

Getting Started

Download 10-day FREE Trial here (http://www.actmobilemessenger.com/try/)

IMPORTANT -- ACT Mobile Messenger works with Act! ONLY

Fill out the online form and you will receive an email with a link to download ACT Mobile Messenger. The **10-day FREE Trial** is an unrestricted full-featured working copy. The software will count down one day at a time, with a warning on the last 3 days. After this time, the software will become disabled and cannot be used until licensed.

Installation

1. Close ACT!

You must close ACT! prior to the installation of the ACT Mobile Messenger

- 2. Log on to your PC as an Administrator (this may mean logging off, restarting your machine, or server)

 Ensure that you have logged on as an administrator on your local machine. If you are not sure what this means than this might be the right time to contact your IT support person, network administrator or IT services company.
- **3. Double-click on the downloaded file:** ActMobileMessenger.msi The Installation Wizard will guide you through installation.



If you need help, please use you free email support and email us at support@actmobilemessenger.com

4. Accept License Agreement

ACT Mobile Messenger is licensed to run on a single machine that is running Act!. You can install the software on multiple machines that share a common Act! database, however you will need to have additional ACT Mobile Messenger licenses. After 10 days, if you do not purchase, the software will cease to function. After purchase, you need to register the software. The reseller who sold it to you will provide a registration key via email shortly after purchase.

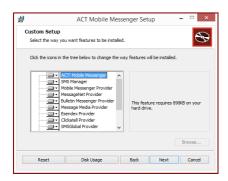


5. Choose a Gateway Provider

In order to send SMS texts from Act!, you'll need a messaging Gateway Provider. Gateway Providers offers web-based services for sending text messages and for managing your account including message credits. ACT Mobile Messenger comes bundled with a range of Message Connectors that are designed to connect to the Gateways, much in the same way printer drivers allows you to connect to specific printers. ACT Mobile Messenger is the only product of it's kind for



Act! to offer a choice of message providers (Gateway Providers). For more information on the providers supported or how to setup your trial account including FREE messages refer to the back of this document.



Typically, you would install only the Message Connector you are going to use, but you can install as many as you like. Currently, there are sixteen (16) Message Connectors, for each of the Gateway Service Providers supported. Each offers a free trial period with FREE sample SMS text messages so you can try the ACT Mobile Messenger during your trial. If we do not support one that you are currently using, or would like to use, we may be able to develop a custom connector for you.

6. Choose Launch Act! with Mobile Messenger check-box

It is recommended that you select the Launch Act! with ACT Mobile Messenger check-box prior to finishing the installation as this will make it easier to find the software if you are a first-time user.



7. Running up the ACT Mobile Messenger for the first time

The first time you try to run the first install on the ACT Mobile Messenger on any ACT! Database, it will try to update the database with the custom activity type and results types for the Text Message activity type. If you are not logged as an administrator as advised in step 2, you will get an error. Please ensure you are logged on as an ACT! Administrator when installing the ACT Mobile Messenger for the first time and especially when it is being loaded for the first time with an ACT! Database.

8. Installation complete no errors

If you are able to start the ACT Mobile Messenger with no errors, then <u>congratulations</u> you have had a successful installation. You are now ready to use the ACT Mobile Messenger. ;)

Start Location

There are many places to start the ACT Mobile Messenger. ACT! is also a very busy application, with many option and choices, so we will endeavour to help you find the most logical place for you to start using the ACT Mobile Messenger.



Once you have started the software 'once' it should be no problem to find it again.

- a) Starting ACT Mobile Messenger using the 'Write' Menu
 - i) Go to the 'Write' Menu in ACT!
 - ii) Select 'SMS Message'
- b) Starting ACT Mobile Messenger using I on the Contact Detail Toolbar
 - i) Go to the 'View' Menu in ACT!
 - ii) Select 'Contacts' [F11] or type 'n' on the keyboard
 - iii) Click on the ACT Mobile Messenger icon in the Toolbar
- c) Starting ACT Mobile Messenger using In the Contact List Toolbar
 - i) Go to the 'View' Menu in ACT!
 - ii) Select 'Contact List' [F8] or type 'l' on the keyboard
 - iii) Click on the ACT Mobile Messenger icon in the Toolbar
- d) Starting ACT Mobile Messenger using I on Group Detail Toolbar icon
 - i) Go to the 'View' Menu in ACT!
 - ii) Select 'Groups' or type 'g' on the keyboard
 - iii) Click on the ACT Mobile Messenger icon in the Toolbar
- e) Starting ACT Mobile Messenger using I on Group List Toolbar
 - i) Go to the 'View' Menu in ACT!
 - ii) Select 'Group List' [F10] or type 's' on the keyboard
 - iii) Click on the ACT Mobile Messenger icon in the Toolbar
- f) Starting ACT Mobile Messenger using short-cut menu
 - i) Go to Contact Screen
 - ii) Right-Click on Contact
 - iii) Select 'Write'
 - iv) Select 'SMS Message'

NOTE: During the installation of the ACT Mobile Messenger you may have been asked whether you would like to automatically start ACT! and load the ACT Mobile Messenger by selecting a tick-box.

Sending your first Text Message (SMS) from ACT!

There are many things you do in Act!, that are second nature. However, it is likely your first time sending a Text Message from Act! so we would like you to get off on the right foot. In order to send your first SMS Text Message we recommend that you do three things:

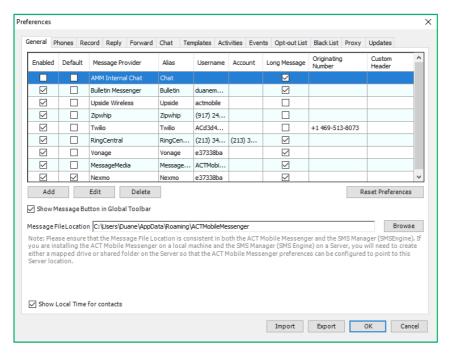
1. Ensure that you have your Message Account User Name & Password





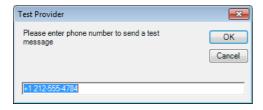
2. Enter these details into the ACT Mobile Messenger preferences tab

This can be found in the File Menu under preferences (not in Act!, in the **ACT Mobile Messenger**). Here you will also select your Primary Message Gateway Service Provider. Once you have selected your provider, you will need to enter a name for your account (Alias/Label) along with your User name and Password.



3. Send a Test Message

Send a Test Message to yourself to ensure your messages are getting through. The 'Test' button allows you to send a test message to the number listed in your MyRecord (generally your number) or any number you choose. This is the fastest way to get a message out and test the service. It is also a good way to check you have entered your account details correctly.



If the account details were entered correctly and the number was valid, you will receive a confirmation that the Message Test Completed and you would have received it on your phone by now.



If not please check the Troubleshooting section in the following pages.



Send a Quick SMS - Step-by-Step

Step 1: Simple Message Screen

In the ACT Mobile Messenger, go to the View Menu and select either 'Simple' or 'Advanced' until you find the Simple screen as displayed above which is used for sending single messages from Act!. Function Key [F7] also allows you to flip screens.

Step 2: Quick SMS Checkbox

Click on the small checkbox that says Quick SMS and ensure that there is a tick $[\checkmark]$ in the box. This places you in Quick SMS mode and will allow you to enter details for a message recipient that has not already been entered into ACT!

Step 3: Enter Details

Enter the Name and Mobile of the person you want to send the message to.

SPECIAL NOTE: It is recommended that when sending your first message, you send the message to yourself or your own cell/mobile phone so that you can see both the message being sent and the message being received.

Step 4: Message

Enter the Message you want to send which can be up to 160 characters in length for a single message. If your message is longer it will be sent as multiple messages.

Step 5: Send Message

Once you are satisfied you have followed steps 1 to 4 and have entered the correct information then you may click on the 'Send Message' button to send your message.

Next Steps:

If everything went to plan you will see a message on the screen like this;



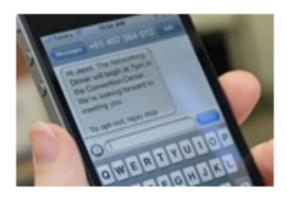
You will also notice that the message details have been recorded in the history, notes or selected field of your MyRecord. These details include the following information;

- a) Date
- b) Time
- c) Result
- d) Regarding & Details
- e) Record Manager (Sender)
- f) Contact Record (Recipient)

Date	Time	Result	Regarding & Details	0	Record Manager	Share With
1/06/2014	1:15 PM	Text Message Sent	SMS Text message sent Hi Meg, can't seem to find you addressare you able to send it to me? Chris		Chris Huffman	



Finally, if everything has worked well, you should have received the message on you cell or mobile phone. The speed at which this occurs will depend on your Internet connection and the performance of your selected messaging gateway.



SUCCESS!

If you have succeeded in sending your first text message from Act! using the Quick SMS feature, it is recommended that you move onto sending messages to contacts or groups within Act! ...
WELL DONE & CONGRATULATIONS!

PROBLEMS?

If you have not received you message it could be for one of the following reasons:

Troubleshooting

The most common reasons for not receiving messages are as follows:

- 1) There is no internet connection available to send a message
- 2) There may be a firewall restriction on your internet service
- 3) The user name and password for the message account is not valid
- 4) There are no message credits left on your message account
- 5) The Cell Phone or Mobile number you have used is not formatted correctly
- 6) The Cell Phone or Mobile number being used is wrong
- 7) The message text contains special characters that are not supported by your provider
- 8) The message provider's service (messaging gateway) is down for some reason
- 9) You have not installed the software correctly or were not logged on as an administrator when doing so
- 10) You are trying to use the software outside of license conditions such as a virtualized environment or shared server



Choice of Providers

Choose your Message Provider (SMS/Text Message Service Provider):

It is important to choose the right provider because depending on where you are located in the world, you will want to find the provider that gives you the best balance of price, performance and deliverability. It is of no use to have 'cheap' or 'free' messages if they are not being delivered or arriving much later than anticipated. There are presently fourteen (14) Message Gateway Service Providers supported by ACT Mobile Messenger that allow you to send Text Messages (SMS) over the Internet directly from Act!, using an internet connection. Depending on whether or not you presently use one of these providers you will need to follow step A) or step B)

A. I already have an ongoing message account with one of the following providers:

Bulletin Messenger - http://www.bulletin.net

Clickatell - http://www.clickatell.com

Esendex - http://www.esendex.com

Frontier Texting – http://www.frontiertexting.com
MessageMedia - http://www.frontiertexting.com

MessageNet - http://www.messagenet.com.au

Nexmo – http://www.nexmo.com

RedCoal- http://www.redcoal.net

RingCentral - http://www.ringcentral.com

SMSGlobal – http://www.smsglobal.com

SMSTech - http://www.smstech.com.au

Twilio - http://www.twilio.com

Upside Wireless - http://www.upsidewireless.com

Webtext - http://www.webtext.com

Zipwhip – http://www.zipwhip.com

NOTE: List of Supported Providers as at December 2018

If you already use one of these message providers then you are already know about sending messages over the Internet and should have your own user name & password, which you would have received from your provider. If you have forgotten these details it is recommended that you contact your service provider to get your user account details, as they will be crucial to ensuring that your messages can be sent.

B. I don't have an account, I'm not sure how to get one, where are my FREE messages?

If you do not have a message account you will need to get one as you will not be able to send any messages without one. Each of the three messages gateway providers we use have their own pros and cons and they all offer trial accounts with 'FREE' messages in order to try them out before deciding which one is best for you.

Setting Up a Messaging Account:

It is quite simple to setup up an account with each of the message providers. All you need to do is visit the websites of any of the message service providers listed above and find the sections relating to setting up a trial account, which will normally be on the front page or home page in most cases. The following pages show you where to start in setting up your trial account to access your 'FREE' messages to start using the ACT Mobile Messenger.



Message Gateway (Provider) – Feature Matrix (Global Providers)

Feature (Capability)	Bulletin	Clickatell	Esendex	Message Media	Nexmo	Ring Central	SMS Global	SMS Tech	Twilio	Webtext	Zipwhip (Frontier)
Rating (1-5 Stars)	****	**	****	***	*	***	***	**	****	*	***
1) Free Text Messages (Trial Period)	✓	1	1	1	×	×	1	✓	×	✓	✓
2) Send Text Messages To: (Cell/Mobile/Device)	✓	1	1	1	1	1	1	1	✓	✓	✓
3) Receive Text Messages From: (Cell/Mobile/Device)	✓	×	1	1	1	1	1	×	✓	×	✓
4) Reply or Callback URL Not Required (Hosting)	✓	×	1	1	1	1	1	×	✓	×	✓
5) Replies to My Phone (Cell/Mobile/Device)	×	1	1	×	×	×	1	1	×	✓	✓
6) Replies to My Email (E-mail Forwarding)	✓	1	1	1	1	✓	1	✓	✓	×	×
7) Replies to Virtual Number (VN) [Long Code]	✓	1	4	1	✓	✓	1	✓	✓	×	✓
8) Customize Sender Phone Number (Own Number)	×	×	1	×	×	×	×	✓	×	×	✓
9) Customize Sender with Text or Name	×	×	1	×	×	×	×	✓	×	×	×
10) System Generated Sender (Pool)	✓	1	×	1	1	×	×	✓	×	✓	✓
11) Multimedia Message Service (MMS) Support	×	×	×	×	×	1	1	×	✓	×	✓
12) Rich Communication Service (RCS) Support	×	×	Æ	×	×	×	×	×	Ø	×	×
13) Confirmation Receipts	✓	1	1	1	1	1	1	✓	✓	✓	✓
14) Read Receipts	✓	×	×	×	×	×	×	×	✓	×	×
15) Virtual Number included (Dedicated)	×	×	1	×	×	1	×	×	×	×	×
16) Virtual Number Purchase (Additional Cost)	✓	1	1	1	1	×	1	1	✓	✓	✓
17) Alpha codes available [Short Code]	✓	1	1	1	1	×	1	✓	×	✓	✓
18) Option of Prepaid Account	✓	1	1	1	×	×	1	1	✓	1	✓
19) Account Establishment (Setup) Fee	×	×	1	1	1	×	1	×	×	×	×
20) Monthly Account Fee	×	×	1	1	1	1	1	1	×	✓	1
21) Multiple User Accounts (Logins)	✓	1	1	1	1	1	1	1	✓	✓	✓
22) Customize Daily Message Limits	✓	×	1	1	1	1	×	×	✓	✓	✓
23) Message Credits do not expire	✓	✓	×	×	×	✓	×	×	✓	×	×
24) Web Application	✓	✓	4	✓	✓	✓	✓	✓	✓	✓	✓
25) Phone Application (Android App)	✓	×	×	×	×	✓	×	×	×	×	✓
26) Phone Application (iPhone App)	✓	×	×	×	×	✓	×	×	×	×	✓
27) Outlook Add-in	✓	×	1	1	×	×	1	✓	×	✓	✓
28) Region Support - USA	✓	1	1	1	1	1	1	1	✓	✓	✓
29) Region Support - Canada	×	×	×	×	1	1	×	1	✓	✓	1
30) Region Support - UK	✓	1	1	1	×	1	1	1	✓	✓	✓
31) Region Support - Ireland	×	×	×	×	×	×	×	×	×	✓	×
32) Region Support - Australia	✓	×	✓	1	×	×	✓	✓	×	×	×
33) Region Support – Asia-Pacific	✓	✓	1	✓	×	✓	1	✓	✓	×	×
34) Region Support - Europe	✓	1	1	1	×	×	1	×	×	✓	✓
35) Region Support – Middle East	✓	✓	✓	✓	×	×	1	×	×	×	×
36) Region Support - Africa	×	✓	×	×	×	×	1	×	×	×	×

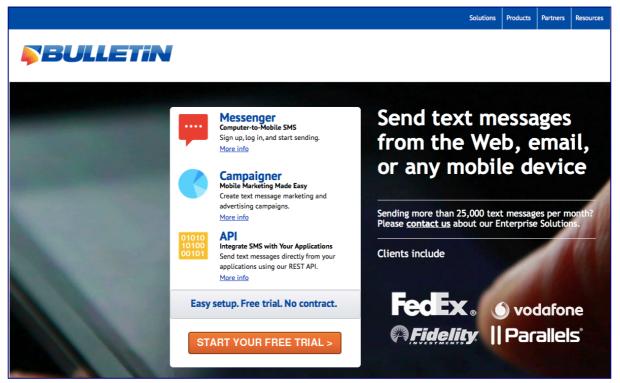


Message Gateway Contact Points

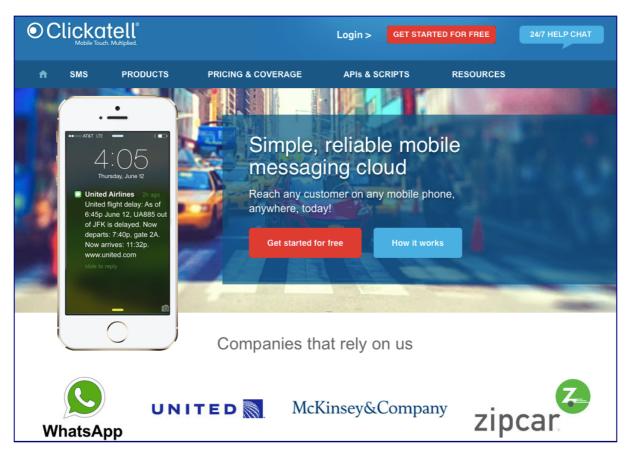
Message Gateway	Location	Address	Contact	Phone		
Bulletin	United States	Level 8, 200 S. Virginia Street Reno NV 89501	Dustin Thornton	+1 775 771 7090		
www.bulletin.net	United Kingdom	Level 1, Holborn Gate, 330 High Holborn London WC1V 7QT	Shaun Hockaday	+44 20 7969 2712		
	Australia	PO Box 1542 Warriewood Square NSW 2102	Annette Tregidga	1300 270 807		
	New Zealand	Level 8, 16 Kingston Street Auckland 1141	Mitendra Das	+64 9307 1146		
Clickatell	United States	Suite 201, 3200 Bridge Parkway Redwood City CA 94065				
www.clickatell.com	South Africa	Level 7, 100 Edward Street Belville 7530 Cape Town	Francois De Lange	+27 21 910 7700		
Esendex www.esendex.com	United States	Suite 1500, 50 California Street, San Francisco CA 94111	+1 866 356 4694			
www.csondex.com	United Kingdom	20 Wollaton Street Nottingham NG1 5FW	+44 115 958 1400			
	Australia	101 Bay Street Brighton VIC 3186	Chris Bartlett	1300 764 946		
MessageMedia	United States	Suite 102, 580 Howard Street, San Francisco, CA 94105	Danny Fonzi	+1 888 799 9767		
www.message-media.com	United Kingdom	Level 6, 52 Grosvenor Gardens, Victoria London SW1W 0AU	Dominic Wates	+44 808 234 8246		
	Australia	Level 22, 385 Bourke Street, Melbourne VIC 3000	Craig Keating	1800 009 767		
SMS Global	Australia	96-98 Market Street South Melbourne VIC 3205	Paul McKenna	1300 883 400		
SMS Tech	Australia	Level 22, 385 Bourke Street Melbourne VIC 3205	Richard Hay	1800 155 228		
Twilio www.twilio.com	United States	Level 3, 645 Harrison St San Francisco CA 94107 399 W. El Camino Real Mountain View CA 94040	Jeff Lawson	+1 (877) 889 4546		
Upside Wireless www.upsidewireless.com	Canada	Suite 503, 553 Thurlow St Vancouver BC V6E 3L2	Branko Zurkovic	+1 (604) 687 7433		
Webtext www.webtext.com	United Kingdom Ireland United States Canada	4-5 High St Galway BC Ireland Suite 201, 36E Main St Norristown PA 19401	AJ Cahill	+44 20 3328 5053 +353 01 2479000 +1 (855) 247 3232		
Zipwhip www.zipwhip.com	United States	Suite 600 2410 4 th Avenue Seattle WA 98121	Justin Ellis	+1 (855) ZIPWHIP +1 (855) 947 9447		

NOTE: The features matrix is published as a guide only. Any specific questions or clarifications regarding features or functionality should be directed to the message gateway concerned. The contact points listed above were valid at time of publishing, but may have changed so please refer to websites if contact points are no longer current.

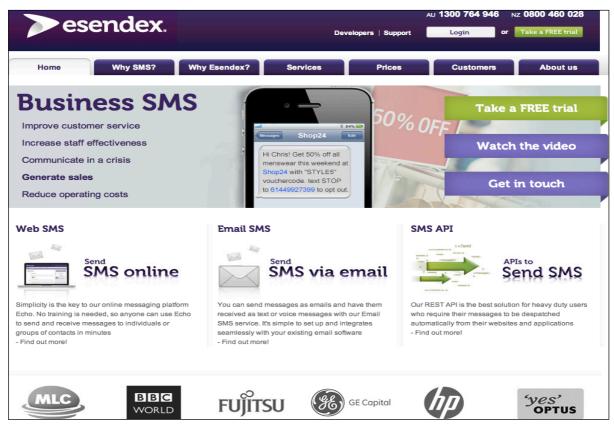




Bulletin.net - Bulletin Messenger - http://www.bulletin.net





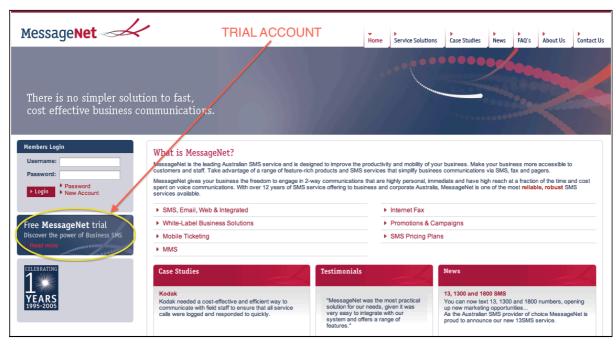


Esendex - http://www.esendex.com



MessageMedia – http://www.message-media.com





MessageNet - http://www.messagenet.com.au

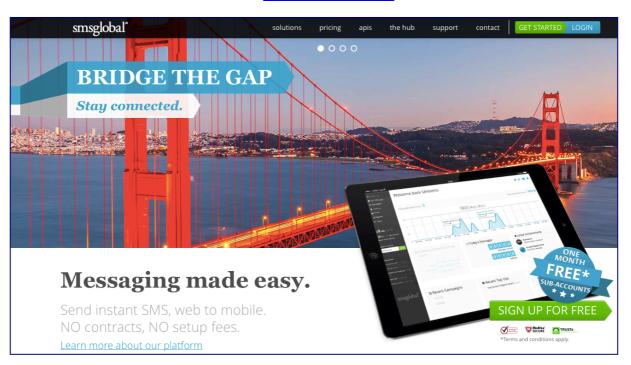


Mobile Messenger – http://www.mobilemessenger.com



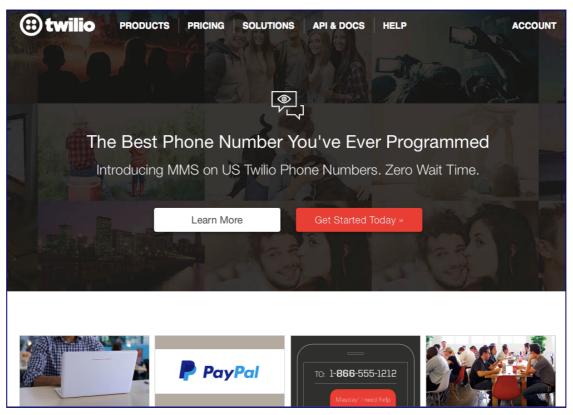


RedCoal - http://www.redcoal.net

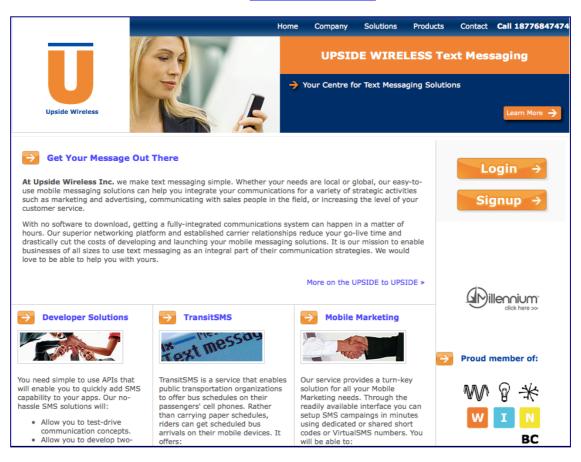


SMSGlobal - http://www.smsglobal.com





Twilio - http://www.twilio.com







Webtext - http://www.webtext.com



Purchasing ACT Mobile Messenger

To purchase, go to the ACT Mobile Messenger site to the 'BUY' page at http://www.actmobilemessenger.com/buy/btml

Please register your software to ensure you receive updates when they become available.

Email not setup?

If you have not setup your email in Act!, don't worry. When you click on the **Buy** button it will automatically copy your details into the windows clipboard and you can paste these into a document or email, that can be sent to your reseller.

Registering ACT Mobile Messenger

Once you have purchased your copy of ACT Mobile Messenger you will receive an Activation Key from your reseller that will enable you to unlock the software. All you need to do is enter the Key and press the Unlock button.

Computer ID & Key:

The key generation process is very secure and is specific to each machine that the ACT Mobile Messenger is installed on. This is for protection of the license and also allows you to keep the same installation and registration even when we send you updated software. This means that it is rare that you will have to re-register your software unless you completely reformat your machine. However, we do understand that most of our users do these sorts of things at odd hours and may need to register their software outside normal business hours. If you have a situation like this please send an email with a screen shot with your registration details and we will do our best to get you registered as soon as possible. However, remember that if you have re-formatted your machine you can go back to trial software until such time as your receive your official registration.

Feedback

We are very keen for you to share your experiences in using this guide and commencing your use of ACT Mobile Messenger. If you have any recommendations or criticisms please let us know as it is with certainty that we will take them on board and address them. You can email us at feedback@actmobilemessenger.com

Thanks

We really appreciate that you have taken your personal or business time to give consideration to a product that we are proud of and user have told us they love. We are continually working to improve the product and your thoughts and ideas are always welcome as well as any issues or criticisms you may have. We would love to have you as a customer and active user of our software.