# **SMS** Integration

## **Requirements**

#### 1. Customer Database should be Live:

 Technics Module > Settings > Database status > > Database status Live

	Database S	tatus: Inspect
		Save
Reason	Database Olahar	
	Database Status	Update Database Status
	Unknown	Automatic
	O Live	O Manual

# Configuration

## 1. Enabled Contract

Currently Int. Service Contract is unavailable in marketplace. Please contact your local HansaWorld representative to sign a contract before starting to use it.

## 2. Set up Phone number

When user will send SMS, system will take user's phone number from Person Register to send SMS.

### System Module > Registers > Persons > > Number Series > Phone 1

				Sample:	Person:	nspect						
$\langle \rangle$						Create	~ C	ancel	Save	$\mathbf{A}$	x	6
	Signature Name		el Jackson		Closed	Urlice	nsed					
5	StandardID	sampl	e@hansav	vorld.com								
Pro	nunciation						_					
Access	Number \$	Series	Sales	Accounts	Job Costi	ng Web	Time E	ntry	Formats	Aste	risk	
	Bonus		4.00	c	ur Ref San	nuel Jaffacake	_	Mir	nimum Pric	e List		_
	Location	WHS		Depar	tment GEI	4			P	OS ID		_
	e Location			P	none 1 +44	8451232732	e.					
Order Reserv	. Location			PI	none 2		e.					
Order Rese	rv. Access											_
Ema	il Address	sample	e@hansaw	orld.com								_
Sp	ecification											_
	Comment											_
	Account	826		Tag/	Object SJ							
	Sort Code			Ba	nk A/C 123	4567893						
				Bank	Name NA	WEST						

#### 3. Set up System Phone Number:

System Phone Number will be displayed as the Text Message sender. This Phone Number applies to the Company in which you are logged in to, and will be only used to send Text Messages to customers. It should be a valid phone number so that the recipient can reply to it. You can set up system phone number in

 Business Alert Module > Settings > Internal System Alerts Settings > System Phone No.

• • •	Internal System Alerts: U	pdate	
			Save
SMS when unexpec	ted restart	Std. Text	_
SMS when Email Qu	ieue has stopped	Std. Text	_
Create Alarm Activi	ty when Email Queue has stopped	Act. Type	_
Create Alarm Activi	ty when Cloud Services have stopped	Act. Type	_
System Phone No	. +37212345678		
Recipient Phone No	D		

# Example of how to use SMS

There are two ways to test if SMS integration is properly working.

### 1. Communication Centre

 Open Communication Center > Choose 'Contact' > Click on 'Text Message'.

System will fill 'To' field from number defined in contact register and 'From' field will be field up from person's register.

 Enter you text message in text field > Tick 'Send' > Click on 'Save'

9 🛛			Message: New				
				Create - Cancel Save	$\sim$	х	0
	2021-11-29 +37212345678 0	Time <u>19:24:58</u> <u>Contact</u>	From Std. Text	Sent			
Text	Hello, This is test messa	ige	Text Misc				

System should send SMS to the number filled in 'To' field

## 2. Business alerts

Text Message can be useful to sent critical business alerts, when immediate action is required by the responsible person. Alert rules can be set in

Business Alert Module > Registers > Approval Rules

•				Sample: Approval F	Rules: New						
>					Create ~	Ca	ancel	Save	$\mathbf{v}$	$\times$	Ø
F	Register	Purcha	se Orders	Comment							
	Contact	SJ									
				Activity Types	Rules						
	Up to		Туре	Approval By	A	ction	Alarm	Next	Level		B
1		1.00	User	SJ	В	y all	SMS	Not R	equire	Q.D	B
2										-	

Choose 'SMS' from paste special in 'Alarm' field.



# **SMS** Integration

# Debugging

## 1. Check if TreatETasksQueue\_SENDSMS is enabled:

Technics Module > Report > Idle tasks list > should have enabled 'TreatETasksQueue\_SENDSMS'

• · 🔒 🥖			Q Search	
			Standard ERI	P, Print date: 2021-11-26 12:0
Code	Argument	Function		
TreatETasksQueue_SENDSMS	SENDSMS	TreatETasksQueueVc		Every 25

#### 2. Check SMS status

It help to check status of all the messages sent by system.

 Business Alert > Reports > SMS Status > choose period when you sent SMSes > Run

		RIKS: SMS St	atus Repo	ort		
•• • 🖬	0			Q Search		
SMS Status R	eport unk TEST			s	tandard ERI	P, Print date: 2021-11-29 18:0 All Contact Classification
Katrin Kiksb	IIK IESI		St	owing Sent to ser	ver, Pending	Delivered to recipient, Faile Sort by: Customer cod
Customer	Customer name	Created	SI	howing Sent to ser	ver, Pending	
		Created 2021-11-25	St 13:54		ver, Pending	Sort by: Customer cod
Customer	Customer name			Last status at		Sort by: Customer cod

### 3. Check sent Messages

It is possible to see all sent message by SERP.

 Database Maintenance Module > Registers > > Messages.



