2sms Account Preferences and Options

Account management

This section explains the benefits of the 2sms 'account' system, and how organisations can deploy SMS services to their business units while maintaining control of usage.

Master account

Every customer of 2sms is assigned a customer account. This is known as a master account. The account carries a username and password, which can be used on the 2sms web site, or with any of the 2sms software add-ins, portal solutions or XML technologies. The master account can be used to purchase SMS messages, and 2sms keeps customer account information and a log of all customer service calls.

A customer can use a master account in isolation, or can open free of charge sub-accounts. We recommend that customers open sub-accounts at departmental levels. This allows for control of usage, streamlined address book management, audit and control.

A master account can impose restrictions on sub accounts.

Sub accounts

A sub account for all intents and purposes operates in the same way to a master account, unless the master account has placed restrictions on the sub-account. Sub accounts can in turn create sub accounts of themselves, so that a parent, child, grandchild relationship can be built up.

This allows organisations to mirror their organisational structure within the SMS environment.

Login segmentation

Customers wishing to allow multiple access to a single account, while logging who actually used the account, can use Login segmentation. In addition to the account id and password, a 4 digit PIN is assigned to each user. At login, the PIN is requested. This allows the account owner to see who sent what and when.

Login segmentation is used where a common pool of resources is operating in a team environment, for example a Helpdesk. Each Helpdesk operator can access and see the traffic of the whole account, but the Helpdesk manager also can see who does what.

Usage control

A master account holder can control what the sub account can do. For example, limit volume of SMS messages sent, limit which address books can be used, or limit the account to only use predefined address books or group lists.

Account balance

Once topped up 2sms sets a threshold on master account. When the balance drops below specified limit support team notifies account holder about the low balance. This allows account holder to keep the balance healthy and top up when required.

2sms also provides automatic top up service where accounts which balance drops below

specified threshold get topped up automatically. The threshold and the top up amount are agreed in advance by the account holder.

This service can also been used to automatically transfer credits from master account to subaccounts.

Address book management

Address books can be stored at the account level on the 2sms web site. The address book is stored in a secure database, and is made available for online use.

Creating and modifying address books

Customers can create their own address books (Assuming the master account has not restricted this capability.) This allows customers to select contacts from the 'Send Message' page on the web site rather than having to type in multiple mobile phone numbers.

They can manually enter data, or upload it from Microsoft Outlook or Microsoft Excel. We recommend that customers keep their address books to less than 500 entries, as displaying an address book of larger size on a web page requires a lot of scrolling. Customers with large address books should contact 2sms to discuss alternative solutions. Customers can edit and delete address book items.

Creating and modifying group lists

Customers wishing to create, modify and delete group distribution lists can do this on the 2sms web site. (Assuming the master account has not restricted this capability.) They can manually enter data, or upload it from Microsoft Outlook or Microsoft Excel.

Address book inheritance

A master account may allow its address books and group lists to be used by a sub account. A sub account in turn, may allow the sub accounts below it the same rights. When an address book is inherited to the next account level down, it can be on a read only basis, and Edit basis (changes can be made.) When a group list is inherited down to a sub account, it can be done on a Read only basis, a Use only basis (where the group list can be used, but the members of the list are not viewable) or on an Edit basis, where changes can be made.

The 'Use only' mode for Group lists is very useful where organisations have high profile mobile phone numbers that they wish staff to send SMS messages to, but do not wish the staff to know to whom the mobile phone numbers belong to.

Address book synch to Outlook /Exchange

If customers are using 2sms Outlook add-in, they can upload their personal address book or Exchange based Global address book information into the 2sms systems. Please note we recommend a 500 record limit on each account.

Web site usage

Customers are able to use the 2sms web site 24/7. This section lists some of the customisation that the site allows.

Branded sites

Customers purchasing over 100,000 messages are entitled to a free branded web site. We offer a URL in the format http://<yound brand>.2sms.com. We place your company logo on the web site, and replace the 2sms name with your brand name. Finally, we allow you to limit which menu options on the web site you want to display. For example, you may not want the 2sms software solutions or the purchasing pages to be made available.

Time zones

Each customer account (incl. sub accounts) can choose their local timezone. All message timestamps will then be quoted in local time. We take account of daylight saving time, and work out the date and day of week according to your timezone, not the actual timezone used in our database. (UTC.)

Currency

We accept payment for our services in a number of currencies, and can quote in your local currency. We currently operate GBP £, USD $ and EUR €. We can accept payments in any other major currency at prevailing foreign exchange rates.

Localised support

We have two support centres at present, one in the UK and one in the US. We are looking to add a third support centre in Asia. The support numbers to call will be listed on the web site and will depend on your time zone.

Sending messages

Sending a text message can be simple, or can be complex. This section lists the options available.

Simple messages

Send a single message to a single person or people listed in your online address book, and/or by typing in their mobile phone numbers.

Group messages

Setup group distribution lists where you want to send to many people at once. Just like email group distribution lists but for SMS.

Send now

Our default service sends the messages as soon as you press the send button.

Send later

You can delay your messages for up to one calendar year.

Recurring messages

If you have a message that you want to send out regularly to a preset schedule, use recurring messages. An example is 'Please submit your timesheets on time'.

Fixed messages

If you have a message that you send our regularly, you can save it for future use. This 'fixed' message then can be used unaltered, or as a template.

2way messages

In certain territories, we are able to route the reply messages back to you.

Trigger messages

In certain territories, we are able to offer the service where if people send you a keyword, you can automatically reply with a fixed message, for example 'Info' sent to you might cause the message 'Please call 12345678 or email abc@xzy.com for help, or visit www.xzy.com/support'

Segmented messages

When you send a message, you might want to record a project code, cost code or other information against the message. This information is not sent with the message, but can be used to run future reports, e.g. all messages sent on project code 123456.

Batch messages

When you send messages, we give the messages a batch number. You can re-send to this batch at a later time, or run reports at the batch level.

Mobile send

If you are away from your desk, you can send SMS messages from your 2sms account by visiting www.2sms.mobi. This allows you to send messages to your group lists. You can select a fixed message or type your own. SMS messages sent will be charged to your 2sms account not to your mobile phone bill. Note that normal data charges apply when using this web site. You will need an internet capable phone to use this service.

Reporting services

Sending a SMS message is only the start of the process of getting people in your organisation informed and acting on the information you send them. Knowing that the message was successfully delivered is an important benefit. 2sms has helped customers win court cases by proving that the information was sent as claimed.

A key benefit of the 2sms service is that is does not matter how you send SMS messages; you might use the web site or our Outlook tool, our Salesforce.com solution or our XML gateway; you will always be able to see reports on all messages sent from the web site, from within our software add-ins or using XML, irrespective of how you sent the message.

The website reports can be customised based on various parameters such as Report Type, Date Range, Status of the messages sent, Destinations to which messages have been sent, Message Reference if specified when sending. The available formats of the reports are: Standard Report, which can be viewed on the page, Printable Report and as a CSV file.

Depending in jurisdiction, regulatory requirements impose the burden of having to record communications for a set time period. For example, the Anti Terror Laws in the UK and US impose requirements to hold records for a number of years. Most SMS providers will provide reporting on messages sent recently, but leave it to the customer to archive that information.

2sms holds SMS traffic information for a minimum of 7 years.

2sms offers pre-defined reports on our web site, a simple report writer, and an on-demand custom report service available via our Sales Support team.

LDAP / Active Directory integration

Customers are beginning to centralise contact information on corporate Directories, using LDAP, Active Directory (Microsoft) or x500.
2sms has developed a number of tools to allow use of these directory services, and is developing more solutions.

1. Desktop client Database edition – If you have a database, Active Directory or LDAP directory, this tool allows you to send messages to people in your directory direct from your desktop.
2. XML services – our XML services, coupled to your own internal applications, can select contacts from directory services, build a SMS message and send it using XML over HTTP(S).
3. Portal technologies – Our Microsoft SharePoint, IBM Web Sphere, BEA Web Logic and Oracle Portal Server solutions are all LDAP capable.

For the future – We are looking to offer customers the ability to address their LDAP directories direct from the 2sms web site. Speed and security issues remain the key items to address before we go live with an offering in this space.

Software plug ins

For more detailed information on our software solutions, please visit
www.2sms.com/software

2sms offers software add-ins in four product areas

1. Desktop application add-ins
2. Portal technologies
3. XML / SOAP / WDSL web services (Web 2.0)
4. Code samples for developers

Desktop applications

Send SMS from Microsoft Outlook, Microsoft Excel or Lotus Notes or Microsoft Windows.

Portal Technologies

Send SMS messages from Microsoft SharePoint, IBM Web Sphere, BEA Web Logic, Salesforce.com, Oracle Portal Server or any JSR-168 compliant portal server.

XML / SOAP / WDSL

Use XML / SOAP / Web services to send SMS messages, open and manage sub accounts, run reports and manage your account.
http://www.2sms.com/software.aspx?Section=XML

Code samples for developers

If you are a software developer, embed SMS into your software. Get free code samples from http://www.2sms.com/software.aspx?Section=Developers

Additional information

The following is useful additional information.

Resource	Location
Software information	www.2sms.com/software
Document library	www.2sms.com/documents
2sms YouTube channel	http://www.youtube.com/user/2smsTextMessaging
Support forum (Technical support)	www.2sms.com/forum
Blog	www.2sms.blogspot.com
Email support	support@2sms.com
Web site	www.2sms.com
Telephone support	+44 1234 757 800 +1 224 353 2600