

A guide on how to send messages directly from ROCKET



ROCKETTXT INTEGRATION GUIDE

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ROCKETTXT INTEGRATION GUIDE

1. ROCKETTXT Interface

1.1 Overview

This built-in functionality allows a **ROCKETXT** subscriber to send SMSs directly from various screens inside **ROCKET**.

There are three types of SMSs that can be sent:

- 1. Ad hoc single SMSs to a member on a one- by-one basis
- 2. Specific task SMSs based on a certain event, such as a reservation now being available
- 3. Bulk SMSs directly from a ROCKET Merge SMS to the ROCKETTXT website

1.2 Ad hoc SMS

These can be sent from within the following screens:

- Bulk Returns
- Chasings
- Members
- Transactions

1.3 Specific Task SMS

These can be sent from the following screens:

- Transactions, Chasings, Members, Bulk Returns to send a message about late items to a single member
- Bulk or Standard Returns when a reservation is available for a single member
- Reservations Report to all members who have a reservation for a certain ex-rental
- Stock Receipts when Customer Orders match the retail products you've receipted
- Customer Orders report to all members who have an order that can now be supplied 2



1.4 Bulk SMS

Bulk SMSs can be sent from within **ROCKET** with this functionality <u>without</u> having to save the file as a Merge SMS, log onto the **ROCKETIXT** website, browse and attach the file, etc. From *Members* reports, *Marketing* reports and the *Overdues* report, you can send the resulting Merge SMS file directly to the **ROCKETIXT** website (screen below, from *Overdues* report).

Reports	
🗉 💩 <u>P</u> rint 🗅	🛤 🔲 🔛 🔍 🔍 100 % 💽 📝 🚱 1/23 🛛 🕲 Back 🙄 Fignward CSV HITML MailMerg Bocket TXT
	Overdues Report Selection Criteria Only Due Today: No Exclude Less Than (Days): More than: 50 Store: ALL
	Overdues / On Hire Report by Member Item Volume Name Type Term Date Report Date Due Late Ext Fee Last Chased Operator Response Spoke To

By clicking on the **ROCKETTXT** button, you will be taken to the following page of the **ROCKETTXT** website. You'll automatically be logged in with your account, the Overdue file (or Members Merge SMS file) will be loaded, and all you have to do is type your message or choose the template you want to use.

ROCKET						Sam	antha Brown Account Admin
	Q	Send SMS	2 Web Inbox	😁 Contacts	Templates	🔁 Personal Reports	🛡 Opt Outs
Dashboard SMS - Web Inbox	Merge CSV Databased / SMS / Merge CSV						
Contacts	MERGE CSV						
Reports 🕶	Campaign Name (Optional)		plate (Optional)				
Dedicated Numbers	Campaign Name		emplate				٣
Opt Outs	Allow Replies *	Sender II					
Settings •	ON	Replies	to Web Inbox/ Email				Ÿ
Management - Sign Out	SMS Message * Hi ((<u>FirstName</u>)), you have ((<u>ItemCount</u>)) rental item(s) overdue. Please return to Store Name asap or call 95185955 to r						
	* (CLAUMIND): you nave (DANDAGAM) / Fehan rein (c) version: Fease Feasi (c) and Fease applied cards) (c) and (c)	ascuss. manaj					
	134 Characters						1 Message Parts
	Available Merge Fields						
	First Name Last Name Item Count						
	← Go Back					🛗 Schedule Options 🛛 🥥 I	Preview Import

Whilst the messages are being sent you can ALT+TAB and continue in **ROCKET**. Or alternatively, wait for the messages to be sent then close the site.

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2. How to Setup your SMS Gateway

First, you need to tell **ROCKET** the details of your **ROCKETTXT** account, and send yourself a test message. To do this, go to Administration, Modules, then External Interfaces.

When you open *External Interfaces* you will be presented with the screen below.

NOTE: In this example all gateways are shown already set up.

Administration Import Windows	Help
Rocket System Options	
Organisation Options	•
Supplier Maintenance	
Operator Maintenance	
List Maintenance	
Product Type Maintenance	
Pricing Maintenance	•
Exceptions Log Reports	•
Copy Depth Plan Maintenance	
Special Days Maintenance	
Daily Comments	
Staff Messages	
Staff Timesheets	•
Reports	
Modules	•
Utilities	•
	_

Туре	Name	Description	Add
Bulk Marketing Gateway	Rocket TXT Marketing	Rocket TEXT web access	
Email Gateway	SMTP Email Gateway	Email client	Edit

You need to set up two interfaces: One for **ROCKETTXT** (direct access from within **ROCKET**), one for bulk SMS via the web.

2.1 LET'S SET UP YOUR SMS GATEWAY

Start by clicking Add on the screen above. The screen at right will appear. Choose one of the interfaces to set up, then click OK.

🖳 External Interface Type			23	
Description	 			
Rocket TXT Marketing Rocket TXT SMS Gateway SMTP Email Gateway				

We will start with the **ROCKETTXT** SMS gateway.

🖳 Edit External Interface		
Details Rocket TXT SMS Gateway	🖳 Screen	
Description: Rocket TXT Screens Using This Interface	Description All Screens One (Castle Hill DVD) Two (Castle Hill DVD)	
Store		Add Delete Settings

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Give this interface a name (say, ROCKETTXT) then click Add. ROCKET will now ask which screens can use this service. We suggest All Screens, then click OK.

Now that you've set up	which screens of	can use this service,	choose Settings.

Edit External Interface		
Details Rocket TXT SMS Gateway		
Description: Rocket TXT		
Screens Using This Interface —		
Store	Screen	Add
All Stores	All Screens	Delete

The screen below will appear. Fill in as described below.

🖳 SMS Gateway Settings		
Outgoing SMS		
From Mobile Number		
URL	http://www.messageport.com.au/http-api.php	
SMS Account Name	support@rocketrental.com	
SMS Password	******	
Default Country Prefix	61	
Testing		
Test Recipient	0409 348900	Send Test SMS
Test Message	Testing Rocket TXT	
Redirect		
Redirect all SMSs to		ī 🔤
	0	Cancel

From Mobile Number:	This is what you want displayed on the recipient's phone when they receive an SMS from you. It can either be a mobile number, the name of your store or you can leave this space blank to allow customers to reply to your messages.		
	Note: Max digits Alpha = 11. Max digits Numeric = 12. Minimum is 5 digits. No spaces or symbols allowed.		
	If left blank, replies will be routed to your store email address.		
URL:	Leave as is		
SMS account name:	Your user name with ROCKETTXT		
SMS Password:	Your ROCKETTXT account password		
Default Country prefix:	Eg, if you are an Australian client, leave this as 61. For New Zealand, change this to 64.		
Testing:	Send yourself a test message to make sure the service is working (screen at right).		
Redirect all SMS to:	Leave blank. Only used for testing with bulk messages. 5		



2.2 How to Use

To make the most of this module you should set up templates for the messages that you will use regularly. Whenever you wish to send an SMS you will have the opportunity of either choosing a template, or type in a message. All templates, except in two areas, are for sending a message to a single customer.

The template types that can be setup are: (you can setup as many of each type as you like)

SMS

- Overdue TXT
- Plain TXT
- Reservation TXT
- Customer orders TXT

To setup your templates go to Administration, Modules, then Templates. You will see the following screen. Click Add.

	Letter Templates	the Real Property lies	Particular (170)	Total Spectra	1400 (00)	Ingently 10	
	Name		Subject				Add
1							Edit
							Delete

2.3 Templates

Plain

Use this type of message when you don't want **ROCKET** to insert anything into the text, apart from the customer's name. This could be used as a welcome, a reminder to bring back a second disk, or any general message you want to send the member.

Customer Order

Use this to send an SMS to one or multiple customers when their retail order has arrived in stock. This type of template will insert the name of the product that was ordered, and can be used from the *Stock Receipts* screen (when you get the warning that *Customer* orders can now be filled) or from the *Customer* Orders report.

Overdue Notice (SMS only)

This template can be used on a member-by-member basis, to send an SMS reminding them about overdues, and will insert the number of late items. This template can be used from the Member file, Transactions screen, Bulk Returns screen and Chasings screen.

Reservation Notice

This can be used from *Bulk Returns*, (when you get a reservation warning) or from the *Reservations* report, for contacting multiple members who have an ex-rental available. Use this on a title-by-title basis.

Template Type
Description Plain Customer Order Reservation Plain (Text Message) Customer Order (Text Message) Overdue Notice (Text Message) Reservation (Text Message)
Ok Cancel

NOTE: When setting up SMS templates, remember to use the character counter to make sure you have no more than 160 characters, including the name of the member and, where applicable, a movie name. If you use more than 160 characters you will be charged for two SMSs.

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Once you've set up your template, choose the Preview button at the top of the screen to see what the message will look like. If you have ticked the Show Salutation box (at the bottom of the template screen) **ROCKET** will start the SMS with *Hi* (first name).

In the Preview button we attempt to advise the maximum characters that **could** be used, based on your SMS template. We have allowed 20 characters in our max character count for the member's first name. If the template is one that will auto insert a movie name (eg, the Reservation Template) then the character count will allow up to a maximum of 50 characters for this field.

In the example at left we've set up an overdue notice. **ROCKET** will insert the number of items (and the word *items*) that are currently late between the *Introduction* words and the *closing* words.

The overlaid screen shows the resulting SMS. **NOTE**: this example is a long message and would be charged as two SMS's.

This screen shows a Reservation template. **ROCKET** will insert the name of the reserved movie between the Opening and Closing paragraphs.

🛃 Edit Letter Template		😴 Edit Letter Template
Template Preview		Template preview
Template Name		Template Name
Overdue 3 days	Messages testrocket Edit	Reservation available
Template Type	Call FaceTime Add Contact	Template Type
Overdue Notice (Text Message)	18/03/2011 12:25 PM	Reservation (Text Message)
Introduction According to our records you have	Hi David According to our records you have 2 items that were due to be returned 3 days ago. Can you please return these as soon as possible to ensure that late fees are not increased. Thank you Castle Hill Video <u>6634</u>	Introduction Your reservation for
Closing	8900	Closing
that were due to be returned 3 days ago. Can you please return these as soon as possible to ensure that late fees are not increased. Thank you Castle Hill Video 9634 8900		is now available for pick up. It will be held for you until Bpm tonight. If you have any problem with arriving before that time pleases call us on 9634692. Thanks Castle HII Vantage Video and DVD
		🖓 Show salutation
	Ok Cancel	Ok Cancel
	· · · · · · · · · · · · · · · · · · ·	



2.4 Now let's see how to use the Templates

In any screen where this function is available, press CTRL + Z for Contact Member or choose from the Quick Help screen.

×	Quick Help
F3	Clear Screen
F4	Close Screen
Ctrl+M	Show Member
Ctrl+V	Show Member Reservations
Ctrl+C	Cancel Return
Ctrl+T	Open New Transaction
Ctrl+Z	Contact Member

You will be presented with the following screen

Contact Member	200	\$2.45.08	Med, 517	X
<u>C</u> ontact via	Mobile - 04093	48900		•
<u>M</u> essage to ser	nd to recipient			
Type in a mess	age			•
1				
<u>N</u> ote to add to	member			
			ОК	Cancel

- 1. Contact Via **ROCKET** will show the email and mobile address on file for that member. Choose which one you wish to use. Click on the drop down arrow to see your options.
- 2. Choose whether you wish to send a free type message or use a template. Click on the drop down arrow to see your options.

If you choose to Use a Template, **ROCKET** will show you a list of the templates that can be used from that screen. Whether you use a template or a free type message you are able to add a note to the member's file.

Once you've chosen your template or typed your message, press OK and the message will be sent.

Contact Member	23
Contact via Mobile - 0409348900	•
Message to send to recipient	
Use a template	•
Overdue more than 3 days	•
and the second	
Note to add to member	
OK Can	cel

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1. About RocketTXT

RocketTXT isn't just about being able to send messages to your customers. RocketTXT is a comprehensive SMS customer management system. Apart from a feature packed online sending and reporting system, RocketTXT includes

- SMS Member Category Change Routine which allows you to quickly and efficiently separate all members with a mobile number and place them into an exclusive SMS member category
- **RocketTXT Quick Link** which takes seconds to install and places an icon on your Rocket Rental software and gives you access to your RocketTXT online sending system instantly

All of these extra features are available at no extra cost and are available in the "Getting Started" section of your RocketTXT website

The new suite of enhanced SMS messaging products will significantly change the way you communicate with your customers.

With RocketTXT you can now send tailored messages to your customers in a simple integrated approach.

RocketTXT allows for a quick, easy-to-use, cost effective means of keeping in touch with customers and other staff.

RocketTXT noticeably reduces call time and costs by sending messages anytime, anywhere.

RocketTXT is ideal for promoting products and events, reminders and notification, and for realising real-time effective communication.

The benefits of RocketTXT include:

- Rocket SMS tailored, personalised SMS
- Web-based application requires no software installation and is accessible via the Internet
- **Central management** reduces maintenance while automatically providing updated features and enhancements.
- **Reduced input time –** it is far easier to type a message on a keyboard than on a handset keypad.
- Merge SMS messages can be sent to multiple recipients simultaneously, with the message body either generic or personalised.
- Message scheduling allows the date and time of message delivery to be preset, recurring at regular intervals or once only.



2. Getting Started

2.1 Logging In

Before starting, ensure that you have been allocated a username and password. This is emailed to you when your user details have been added.



Figure 2.1: RocketTXT Login Screen

Access the login screen shown in Figure 3.1 by clicking on the link provided in the RocketTXT registration email. Enter your allocated user name and password, included in the registration email, in the relevant edit boxes. Click on the *Login* button to continue. The **Account Summary** screen is displayed.

If you are not sure of your local URL to access RocketTXT, refer to the Contact Information at the back of this document.



Should you forget your user name and/or password, click on the "Forgotten Password?" button. Your password will be emailed to your registered email address.



The password is case sensitive so ensure that it is entered correctly.



Add the RocketTXT site to your list of Favorites by bookmarking it (Ctrl+D).



3. Rocket SMS Member Category Change Routine

This routine allows you to move those numbers with a mobile phone number on file (ie, a number found with a prefix of 04 in Australia and 02 in New Zealand) into an SMS membership category. Those that do not have a mobile number will have an alert message added to their file (*GET MEMBER'S MOBILE NUMBER AT NEXT HIRE!*), so that the staff will be reminded at the time of transaction to get a mobile number from the member.

When running the routine, you will be given a drop down list of your membership categories. You will need to select which one you want to move the members from, and then select the category you want to move them to. Before running the routine ensure you have set up the SMS membership type giving it the name you like. To do this you go into **ROCKET/ADMINISTRATION MENU/LIST MAINTENANCE**. Select the **OTHER** tab and then open **MEMBER TYPES**

3.1 Instructions for Running the SMS Member Category Change Routine

- a) Please run a backup before proceeding
- b) To install the program, save the file ROCKET SMS MEMBER CHANGE.EXE from the email into a folder on your hard disk and then double click on it to install the routine. Select <u>N</u>EXT to go through each screen, then <u>E</u>INISH to exit.
- c) A small Rocket icon will be created on your desktop called SMS CATEGORY CHANGE.
- d) Click on this icon to run the routine. You will be presented with the following screen:



Figure 3.1: SMS Member Category Change Routine

- e) Choose the Member Category you wish to move from. The routine will consider only members in this category with a mobile number
- f) Choose the Member Category to move these members to.
- g) Select your operator code. This code will be shown in the member alerts as the operator who added the alert message.
- h) Select **RUN** to process the changes
- i) When the routine has finished you will be given a message "**Process Completed**" Select **OK** and it will close the screen
- j) Check that your promotions are still relevant to the new SMS member category

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4. ROCKETTXT Quicklink

The Rocket Quicklink is a routine that allows you to insert a ROCKETTXT link to the lower left hand side of your Rocket screens.

This will ensure that you are able to click onto on this link from wherever you are in Rocket and immediately be directed to your RocketTXT online sending system.

Just follow the very simple steps from your link in your *GETTING STARTED* page of your ROCKETTXT web site and within seconds, this link will be automatically installed into your Rocket system.

If you are currently using "link 1" for another application, the RocketTXT Quicklink will not install. You should delete "link 1" and re-install the RocketTXT Quicklink. You are then able to re-establish your other link to "link 2". For assistance with this please contact the Rocket help desk.



Figure 4.1: Rocket Transaction Screen with RocketTXT Quicklink



Figure 5.2: Main Menu with RocktTXT Quicklink



5. Rocket Templates

Access this screen by selecting Rocket Templates from the Message Templates menu.

The Rocket Template feature allows you to select a format eg Marketing, Debt or Overdue. Each of these selections will display all of the merge fields which you are able to insert to assist in creating your template.

You are able to create and manage unlimited templates. Below are some suggested formats

ROCKET										Sama A	ntha Brown
					🗣 Send	SMS 🎝		嶜 Contacts	Templates		🛡 Opt Outs
Dashboard SMS = Web Inbox Contacts Reports = Dedicated Numbers Opt Cluss Settings = Management = Sign Out	CREATE TEMPLATES CREATE TEMPLATE Name * Inactives Allow Replies * CREATE Stamplay, we haven't a		<u>keDate))</u> You current	ly have ((<u>Debtilelance</u>)) re	ant this week and we will wipe		b Inbox/ Email				•
	158 Characters Include Merge Fields Global Template First Name Go Back	Last Name	Item Count								고 1 Message Parts 한 Save

Figure 5.1: Rocket Templates

5.1	Late List	Dear <first name="">, you have <item count=""> rental items outstanding. Please return to ACME Video asap or call 96981234 to discuss</item></first>
5.2	Birthday	Happy Birthday <first name="">! come in on <birthday> for your FREE NEW RELEASE DVD! From the team at ACME Video. Opt out? 96981234</birthday></first>
5.3	Debt Chasings	Dear <first name="">, our records show an amount of <debt balance=""> owing. Please contact ACME Video on 96981234 to avoid legal proceedings.</debt></first>
5.4	Lapsed Members	Dear <first name="">, we haven't seen you since <last active="" date="">. Come in to ACME Video before Saturday, show msg for FREE DVD Rental. Opt out? 96981234</last></first>

Figure 5.2: Template Samples



6. How to create a Rocket Merge File

All member reports in Rocket allow you to export the results of a report into a merge format. The format of the file is exactly the same for all reports except for Overdues/Late and Debts. You simply run the report then choose the Merge SMS button at the top of the screen as shown below.

Reports		
🗉 🍓 Brint 🗅	🗰 🗉 🖽 🗠 🔍 100 % 🔽 📄 🕢 🕼 1/23 🛛 🔇 Back 🙄 Figward SSV HITML MailMerg Booket TXT	
	Overdues Report Selection Criteria Only Due Today: No Exclude Less Than (Days): More than: 50 Store: ALL	
	Overdues / On Hire Report by Member Item Volume Name Type Term Date Report Date Due Late Ext Fee Last Chased Operator Response	Spoke To

Rocket will then save the file (the default location is the Rocket directory). You can change where the file is saved if you wish.

Once you've saved the file, you will be asked if you wish to add a note to the members in the file. The Overdue report, Reservations report and Customer Orders report will auto note that the customer has been contacted.

SMS Type	Rocket Report to use
Chasing Late fees	Overdue Reports – select in Member Order
Marketing/Lapsed/Birthday	Any of the Marketing or Member reports
Debt Chasings	Member Report - Debts
Reservation is ready	Reservation report – Put Away not called
Customer Order is ready	Customer Order report – Can be filled, not called



7. Rocket Member Merge

7.1 Sending a Member Merge

7.1.1 Rocket Member Merge - Step 1/4

Figure 5.1 shows the first step of Rocket file upload. In this case it is an Overdue or Chasings report. The Overdue Merge option has been selected and the respective region/country has been selected. Once a region/country has been selected, this will remain as the default until you elect to change if necessary.

ROCKET						Sam	antha Brown Account Admin
	Q Se	nd SMS	2. Web Inbox	😁 Contacts	Templates	Personal Reports	Opt Outs
Dashboard SMS • Web Inbox	Merge CSV Duabbaard / SMS / Merge CSV						
Contacts	MERGE CSV						
Reports • Dedicated Numbers	Campaign Name (Optional) Campaign Name		nplate (Optional) Template				٣
Opt Outs Settings +	Allow Replies *	Sender I Replies	D * to Web Inbox/ Email				v
Management +	SMS Message * Ht ((ErstMame)), you have ((term_count)) rental item(s) overdue. Please return to Store Name asap or call 95185955 to dis	ours Thanks	1				
Sprou.	un (<u>DETACTANTAT</u>), you nave (<u>URETERANTAT</u>) tei wai itei ite) yoer uwe, mease recul it to storie maine asab or car so rozzer to us	cuss. manks	1				
	134 Characters						1 Message Parts
	Available Merge Fields First Name Last Name Item Count						
	← Go Back					🛗 Schedule Options 🛛 🗛 F	review Import

Figure 7.1: Rocket Member Merge - Step 2/4

7.1.2 Rocket Member Merge – Step 2/4

To compose the message manually, type the details in the *Compose Message* text area. Where details are to be inserted from the *Rocket Member File*, use the **Mail Merge Columns** buttons to insert the required personalised data.

To use an existing message template, select the Template from the drop-down list. Edit the template in the Compose Message text area.

ROCKETTX	7						S Account Admin (movies@a	amantha Brown flanticdvd.com.au)
		Q.	Send SMS	💫 Web Inbox	🚰 Contacts	🖉 Templates	🕞 Personal Repor	ts 🛛 Opt Ou
Dashboard	Merge SMS							
SMS •	Dashboard / SMS / Merge							
Web Inbox								
Contacts	352 numbers imported							
Reports -								
Dedicated Numbers	IMPORT PREVIEW							
Opt Outs	🗲 Go Back						C Refresh Changes	🗣 Send Messages
Settings +	Phone Number	Message						
Management +	▼ +61409	HI you currently have 4 rental items outstanding. Please retur						
Sign Out	W +61427	Hi you currently have 4 rental items outstanding. Please retur						
	×61418	Hi you currently have 4 rental items outstanding. Please retur						
	• • • • • • • • • • • • • • • • •							
	¥ +61419	Hi you currently have 4 rental items outstanding. Please retur						
	×61417	Hi you currently have 4 rental items outstanding. Please retained						
	*61434	HI you currently have 4 rental items outstanding. Please return						
	Ø +61424	HI you currently have 4 rental items outstanding. Please retur						
	IØ +61427	HI you currently have 4 rental items outstanding. Please return						
	III +61439	HI you currently have 4 rental items outstanding. Please return	m asap or call !	9555 111 to discuss. Re	gards, Atlantic DVD			
	W +61408	HI you currently have 4 rental items outstanding. Please return	m asap or call !	9555 111 to discuss. Re	gards, Atlantic DVD			
	₩ +61408	HI you currently have 4 rental items outstanding. Please retur	m asap or call !	9555 111 to discuss. Re	gards, Atlantic DVD			
	IZ +61448	HI you currently have 4 rental items outstanding. Please return	m asap or call !	9555 111 to discuss. Re	gards, Atlantic DVD			

Figure 7.2: Rocket Member Merge – Step 3/4

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7.1.3 Rocket Member Merge – Step 3/4

The **Rocket Merge Send Report** gives an example of the message to be sent, the total number of messages that will be merged, and the opportunity for individuals to be omitted from the merge send.

The **Rocket Merge Contacts** window contains a summary of the recipients. You are able to de-select any individuals that you would like to be omitted from receiving the message. You must de-select, then click *Refresh*. This will ensure any de-selected contacts will not receive a message and the total number of merge contacts summary will be updated.

Any errors during this process would more than likely be because the file that you are attempting to upload is incorrect. Ensure that you have selected the correct Rocket member file.



The confirmation report does not indicate if any of the messages will exceed 160 characters once merged. It is therefore important that when composing the message body, the maximum length of each column being imported is considered. Do remember that the mobile number is not included as part of the message body, and that this does not need to be considered when ensuring that the maximum character limit is not exceeded.

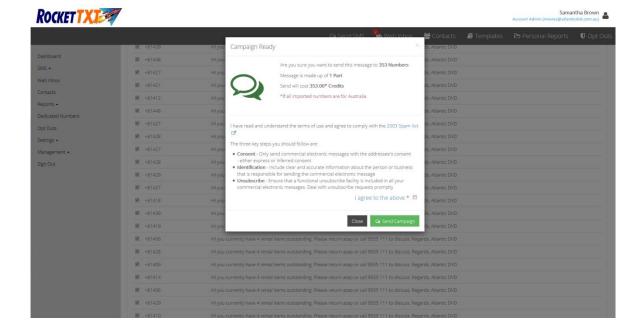


Figure 7.3: Rocket Member Merge – Step 4/4

7.1.4 Rocket Member Merge - Step 4/4

The final step of your Rocket Member Merge is to confirm the send. This step includes a dialogue box which contains the amount of messages that will be delivered. This is an opportunity to *Continue or Decline*. It is specifically designed to prevent accidental sending.

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