



USER & INTEGRATION MANUAL

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 **ROCKETTXT** 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*

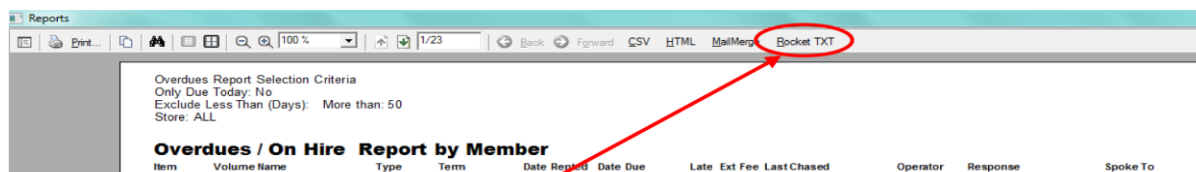
1.3 Specific Task SMS

These can be sent from the following screens:

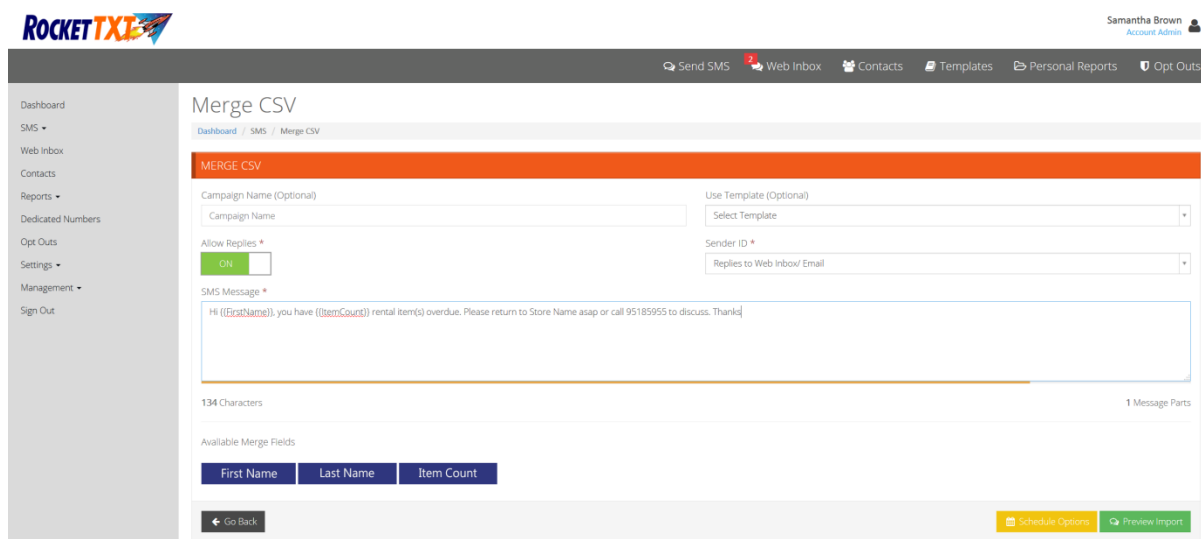
- *Transactions, Chasings, Members, Bulk Returns*
to send a message about late items to a single member
- *Bulk or Standard Returns*
when a reservation is available for a single member
- *Reservations Report*
to all members who have a reservation for a certain ex-rental
- *Stock Receipts*
when *Customer 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 without having to save the file as a Merge SMS, log onto the **ROCKETTXT** 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 **ROCKETTXT** website (screen below, from *Overdues* report).



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.



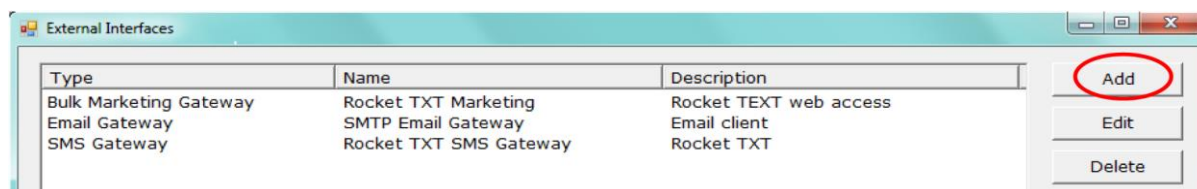
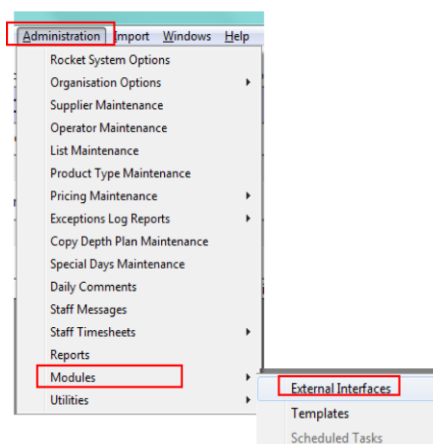
Whilst the messages are being sent you can ALT+TAB and continue in **ROCKET**. Or alternatively, wait for the messages to be sent then close the site.

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.

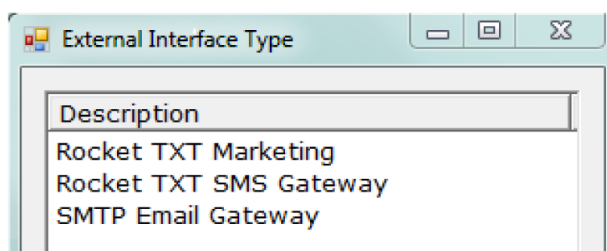
NOTE: In this example all gateways are shown already set up.



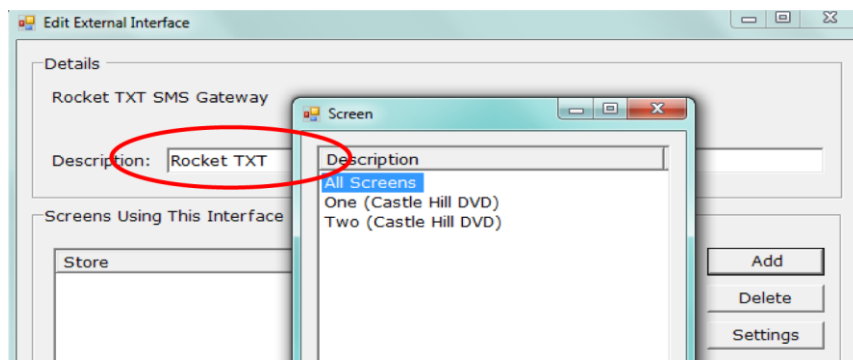
You need to set up two interfaces: One for **ROCKETTXT** (direct access from within **ROCKET**), one for bulk SMS via the web.

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.

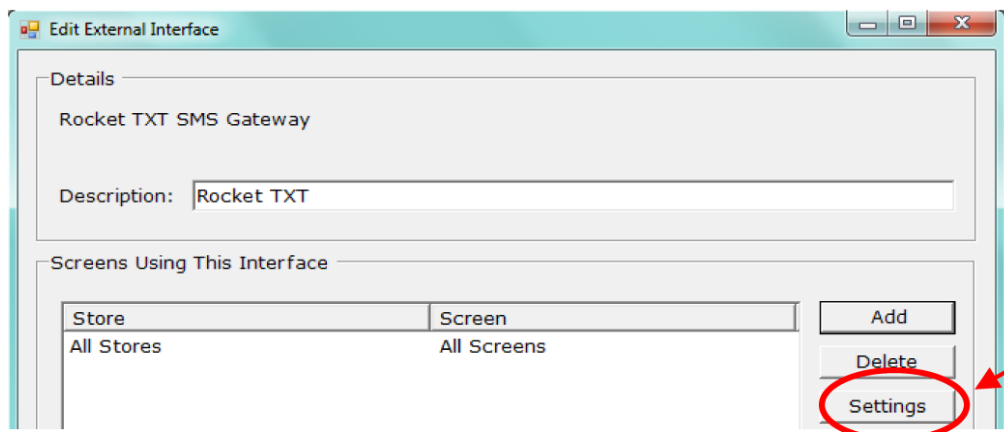


We will start with the **ROCKETTXT** SMS gateway.

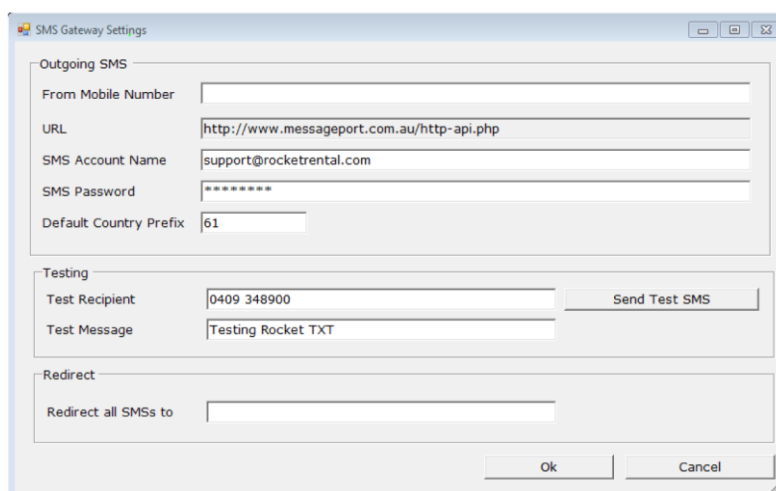


Give this interface a name (say, **ROCKETTXT**) then click Add. **ROCKET** will now ask which screens can use this service. We suggest *All Screens*, then click OK.

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



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



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*.



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

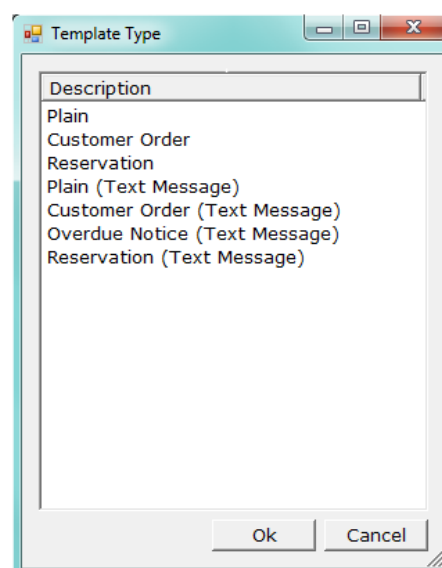
Use this to send an SMS to one or multiple customers when their retail order has arrived in stock. This type of template will insert the name of the product that was ordered, and can be used from the *Stock Receipts* screen (when you get the warning that *Customer orders can now be filled*) or from the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



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.

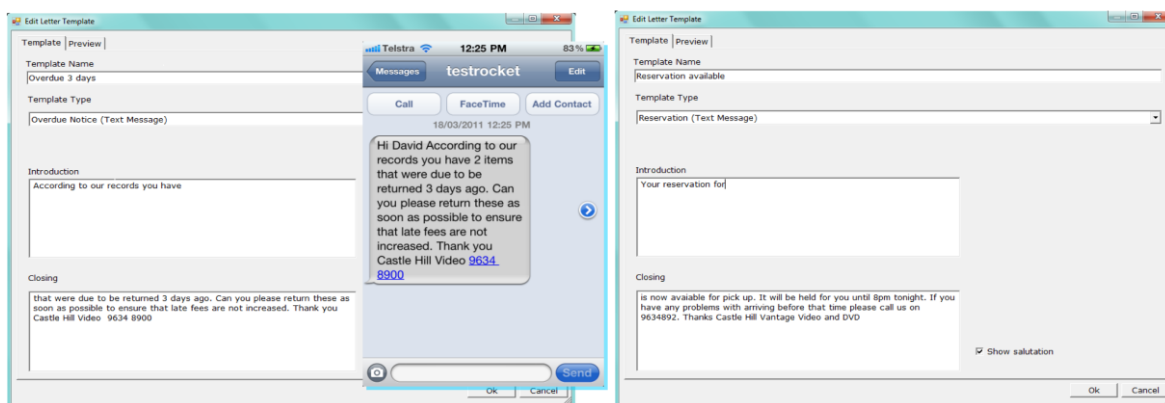
Once you've set up your template, choose the *Preview* button at the top of the screen to see what the message will look like. If you have ticked the *Show Salutation* box (at the bottom of the template screen) **ROCKET** will start the SMS with *Hi (first name)*.

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.

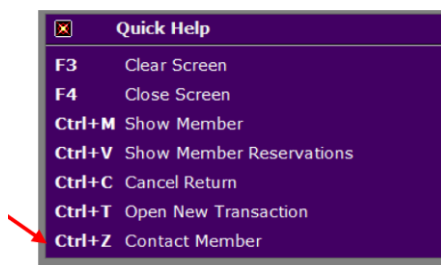
The overlaid screen shows the resulting SMS. **NOTE:** this example is a long message and would be charged as two SMS's.

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

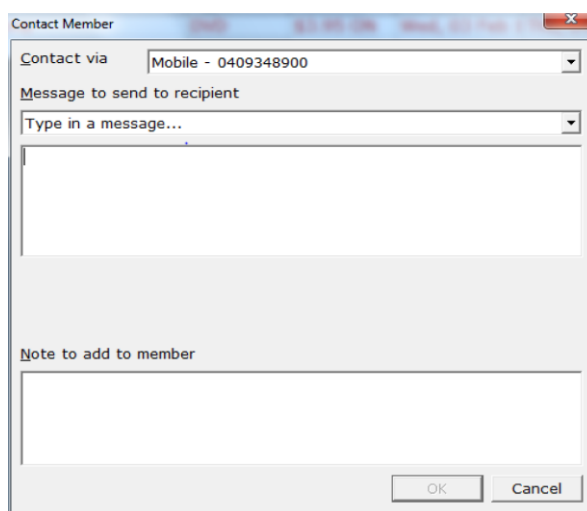


2.4 Now let's see how to use the Templates

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



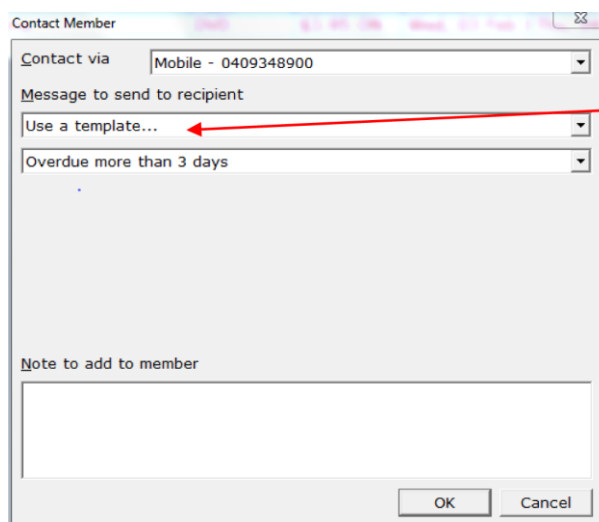
You will be presented with the following screen



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.



ROCKETTXT USER GUIDE

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 **NEXT** to go through each screen, then **FINISH** 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

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.

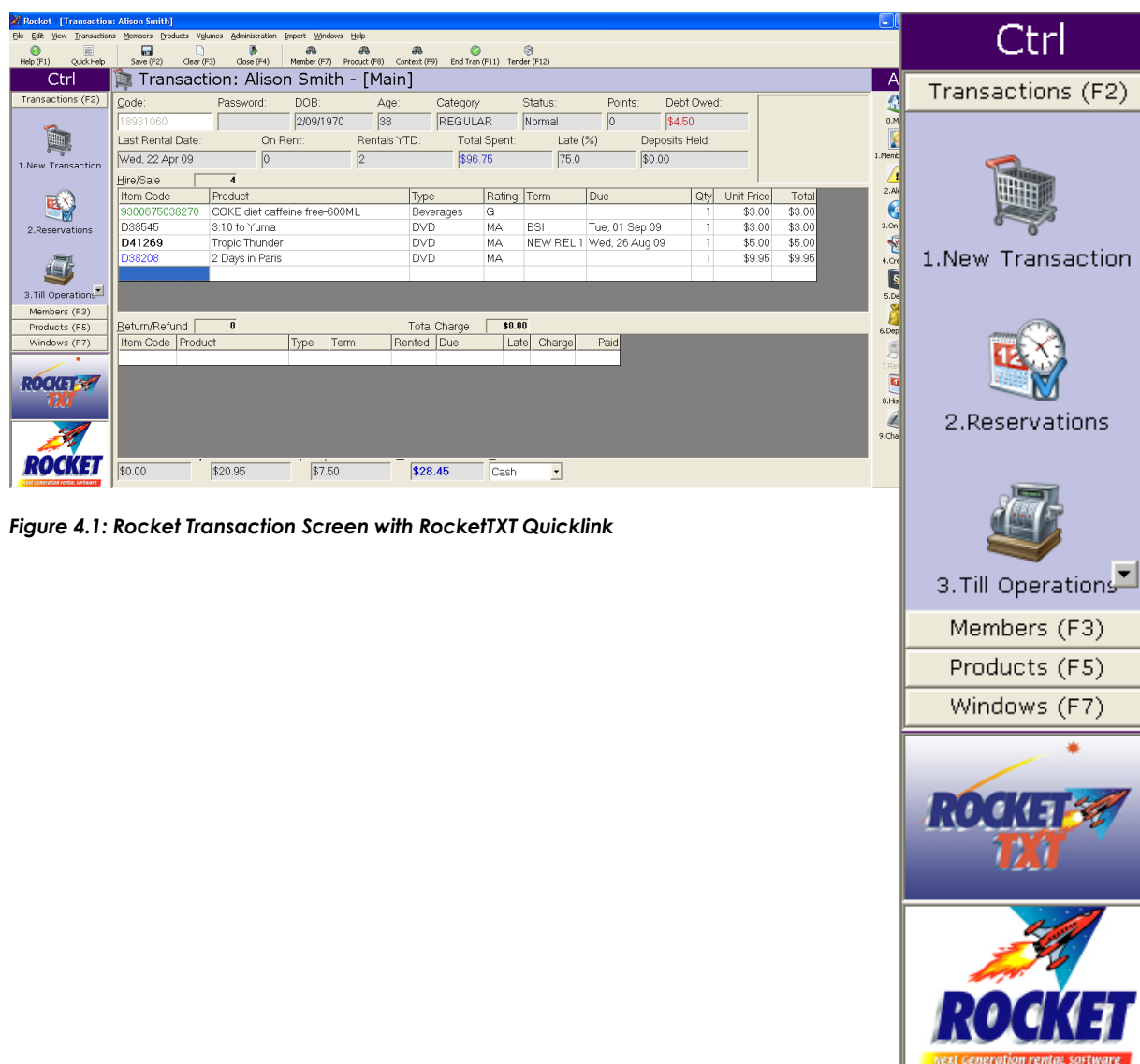


Figure 4.1: Rocket Transaction Screen with RocketTXT Quicklink

Figure 5.2: Main Menu with RocketTXT 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

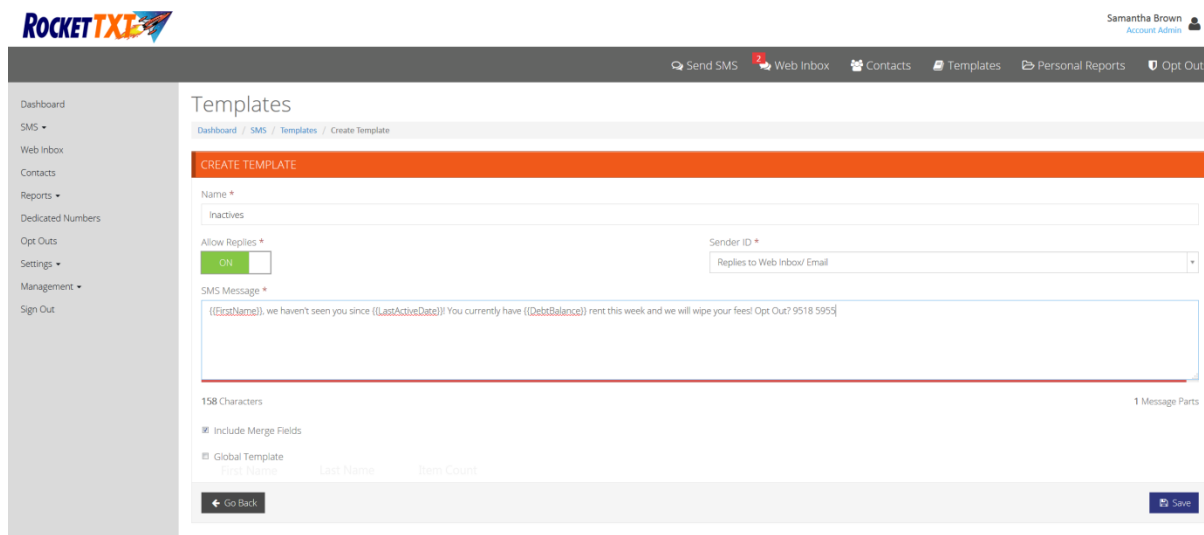


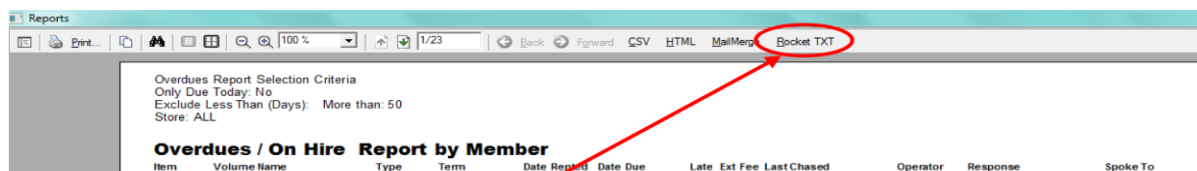
Figure 5.1: Rocket Templates

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
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
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.
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

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.



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.

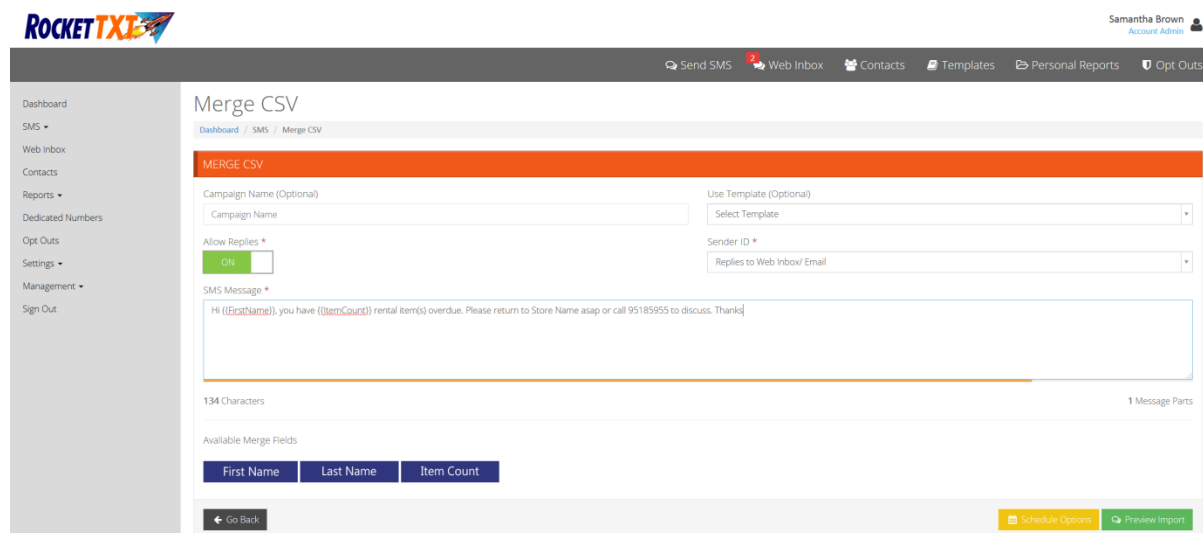
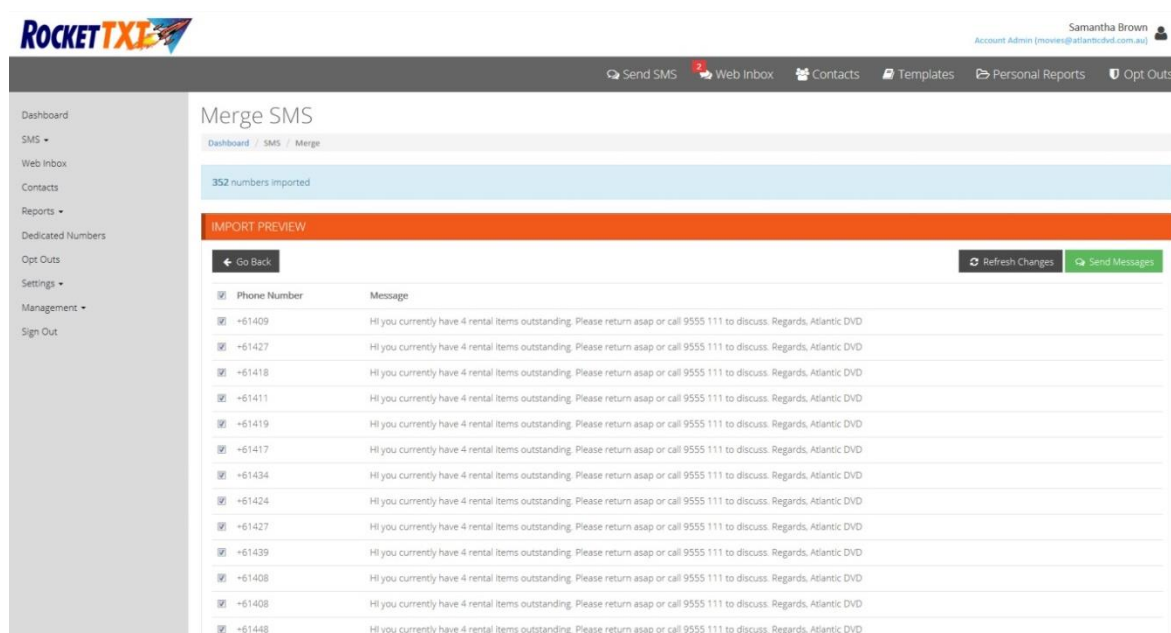


Figure 7.1: Rocket Member Merge – Step 2/4

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.



Phone Number	Message
+61409	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61427	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61418	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61411	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61419	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61417	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61434	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61424	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61427	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61439	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61408	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61408	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD
+61448	Hi you currently have 4 rental items outstanding. Please return asap or call 9555 111 to discuss. Regards, Atlantic DVD


Figure 7.2: Rocket Member Merge – Step 3/4

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.

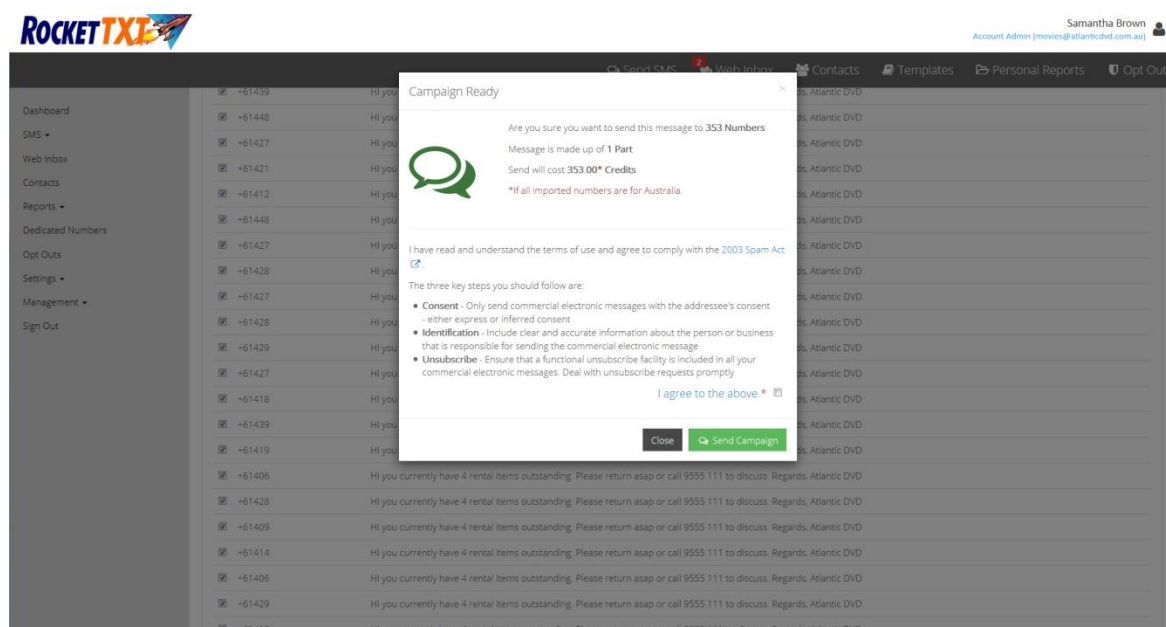


Figure 7.3: Rocket Member Merge – Step 4/4

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.