ZERIXTEXT

Corporate Messaging Solution

User Manual

Phone book

Using **ZERIX Text**, you can import and maintain all your contacts, sort them according to groups, synchronize them with an existing database, and even manage a block list. All contacts added to the Recipient List will be displayed when you compose a message.

Setup Individual Contacts

This chapter discusses how you can search, add, edit, and delete records of **Individual** contacts.
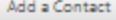
Individual Contacts - Main Screen

Add new contact

1. Click on add contact ![Add a Contact] .

2. Choose Contact privacy.
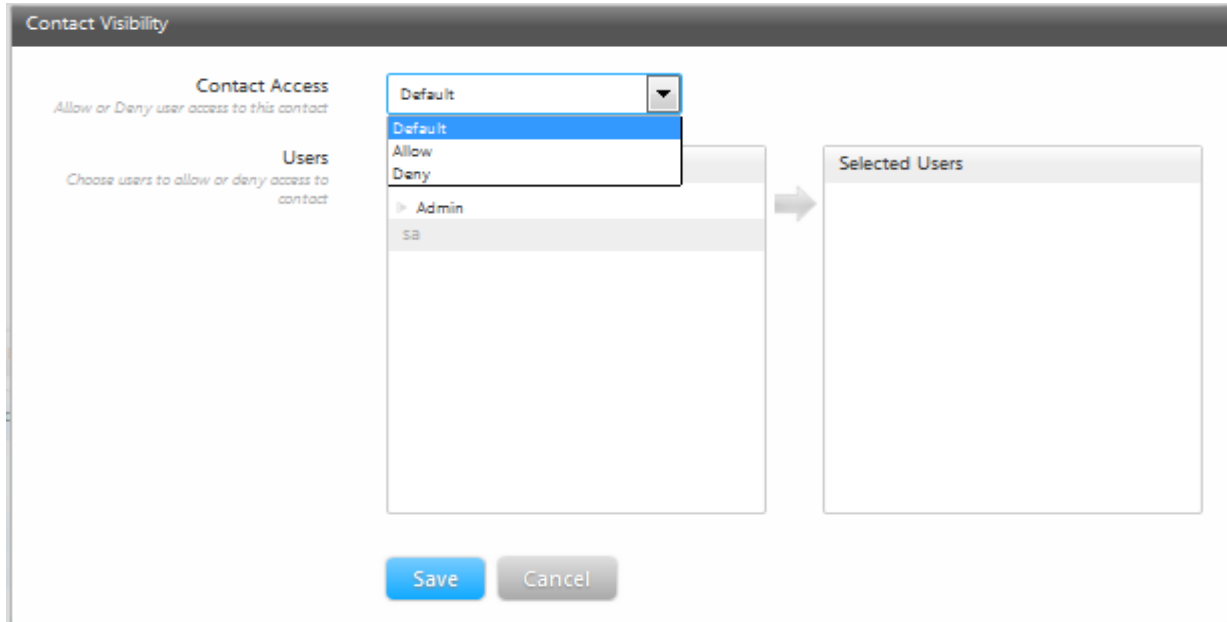
Public: All users have access to the contacts created but the creator can deny or allow specific user to view the contact.
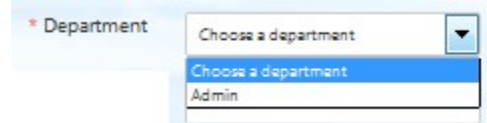
Department: Only the users of department have access to the contact created.
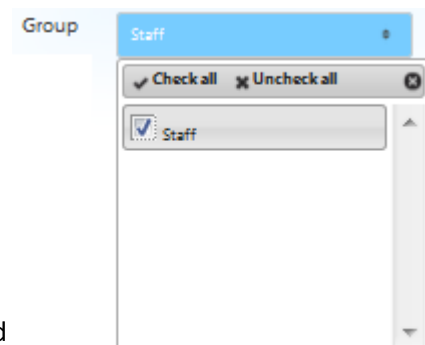
Private: Only the creator of the contact has the access.

3. Enter information , such as Last Name, First Name, Middle Initial, Salutation, Sex, Birth date, Mobile Number, and Job Position. With asterisk mark (*) are the necessary information needed.

4. You can also include the contact to a specific group
Or to a multiple group, just click the check box and
Close the drop down by clicking ![button] button.

5. Click ![Save] to save created contact, after saving created

Successfully created record.

Contacts for user [sa] [▼]

	First Name	Last Name	Mobile Number	Email Address	Creator	Privacy	
☐	Juan	Dele Cruz	09051234567	Juan@zerix.com.ph	sa	Private	Edit

Add a Contact

Search: [ ] Show 10 [▼] entries

All | ABC | DEF | GHI | JKL | MNO | PQR | STU | VWX | YZ

6. To delete contact just press the check box on the left side and press [Delete] button.

	First Name	Last Name	Mobile Number	Email Address	Creator	Privacy	
☑	Juan	Dele Cruz	09051234567	Juan@zerix.com.ph	sa	Private	Edit

Add a Contact

Search: [Juan] Show 10 [▼] entries

All | ABC | DEF | GHI | JKL | MNO | PQR | STU | VWX | YZ

	First Name	Last Name	Mobile Number	Email Address	Creator	Privacy	
☐	Juan	Dele Cruz	09051234567	Juan@zerix.com.ph	sa	Private	Edit

Setup Contact Groups

Contact groups are an efficient way to organize your contacts. Using contact groups, you'll also be able to send one message to several contacts.

This chapter discusses how you can Search, Create, Edit, and Delete

Contact Groups - Main Screen
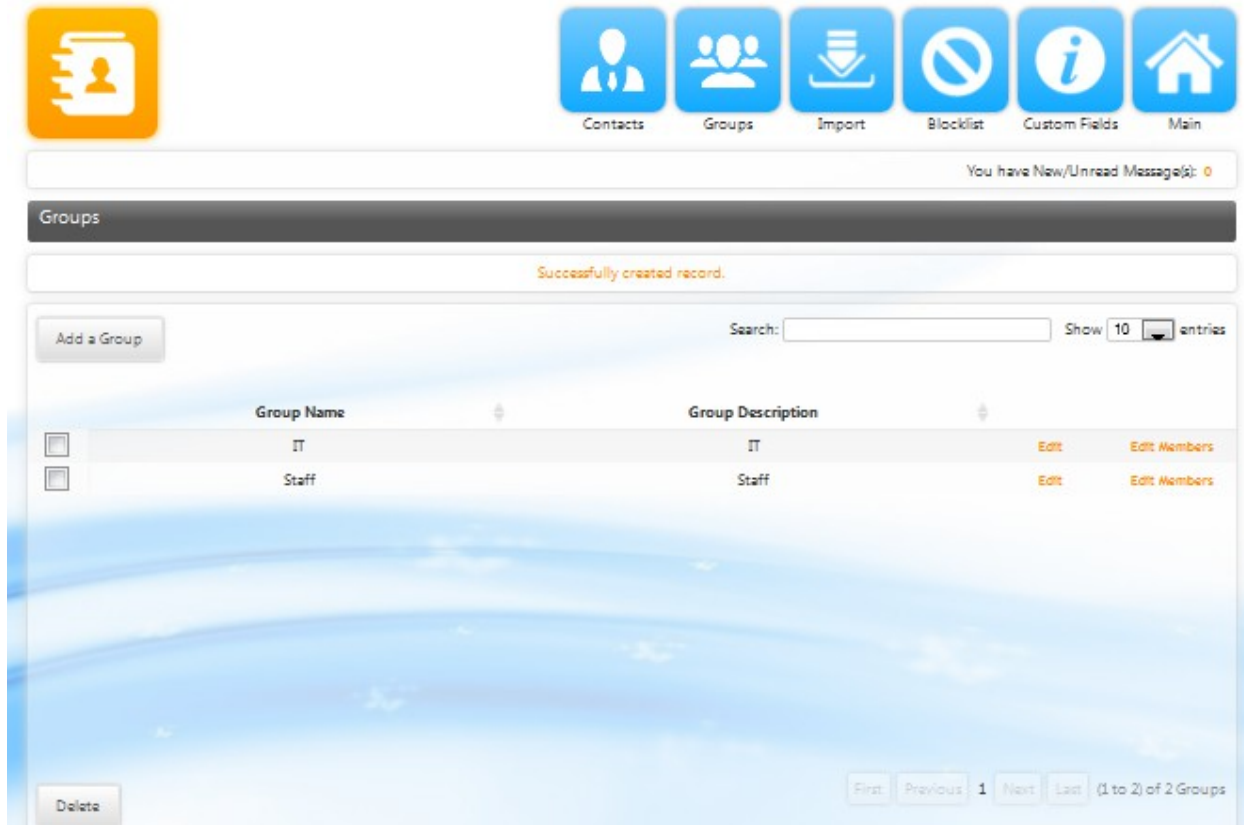
Creating a group

1. Click on Add a Group [Add a Group] .
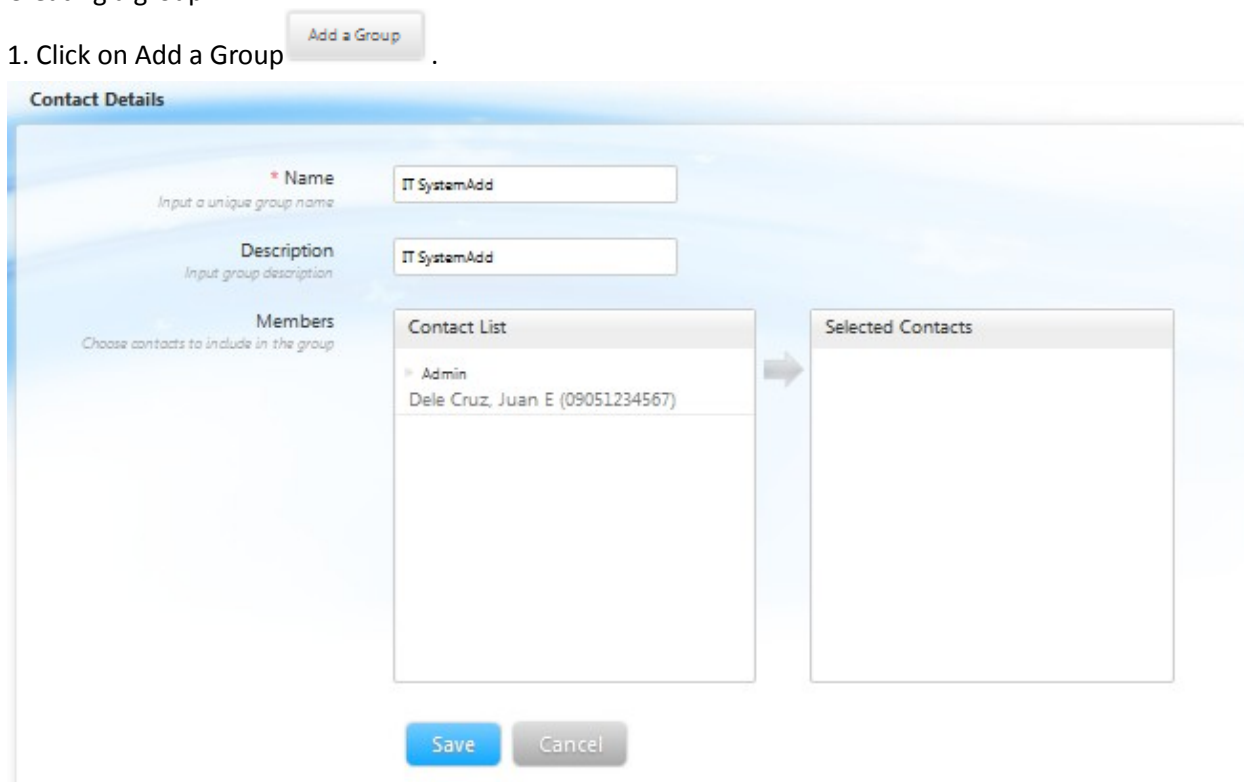
3. Recently created group will be automatically added on the group list.
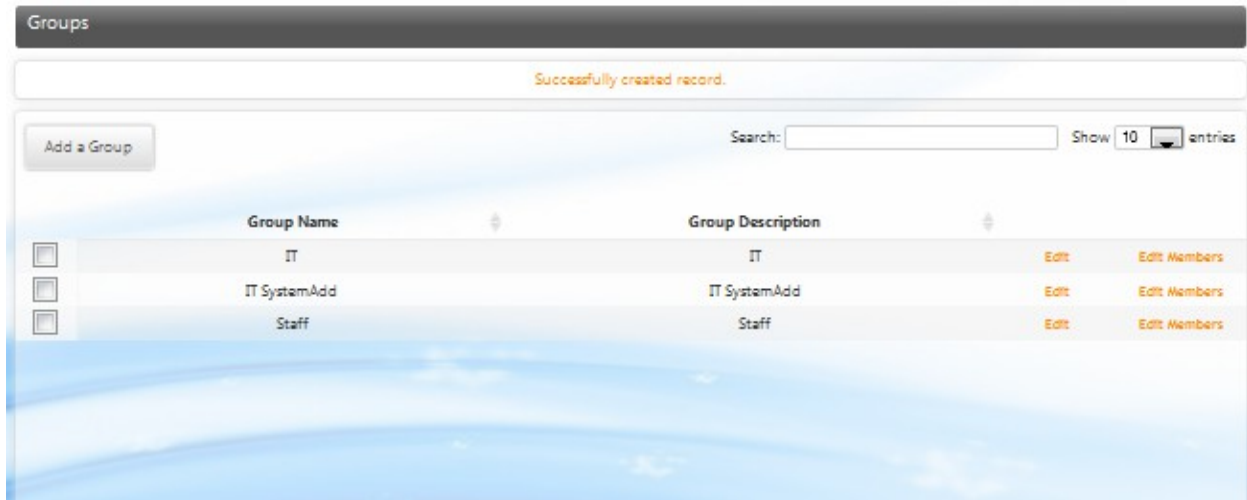
4. To add an additional contacts click on the Edit Members.

Import Contacts

ZERIX Text allows you to import contacts from comma-separated values file (.csv) excel file (.xls).

Import Contacts - Main Screen
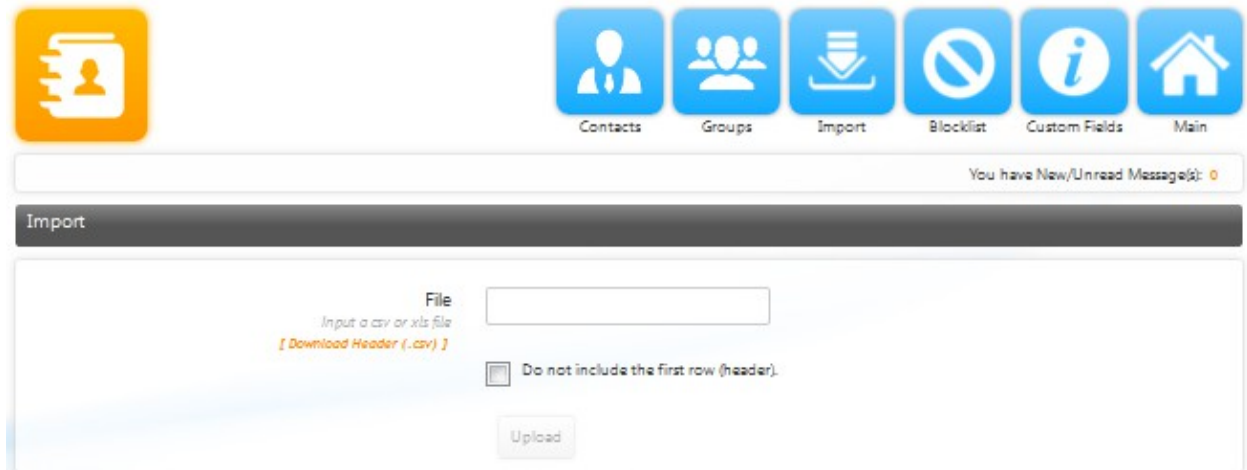
1. To Import contacts the file must be on comma-separated values file (.csv) excel file (.xls) and click the download header   *[Download Header (.csv)]*
2. Or the fields are in this order "MobileNumber,FirstName,LastName,MiddleInitial".
3. To upooload the .csv file click the box

4. After the box is clicked, select the file and press open. zerix
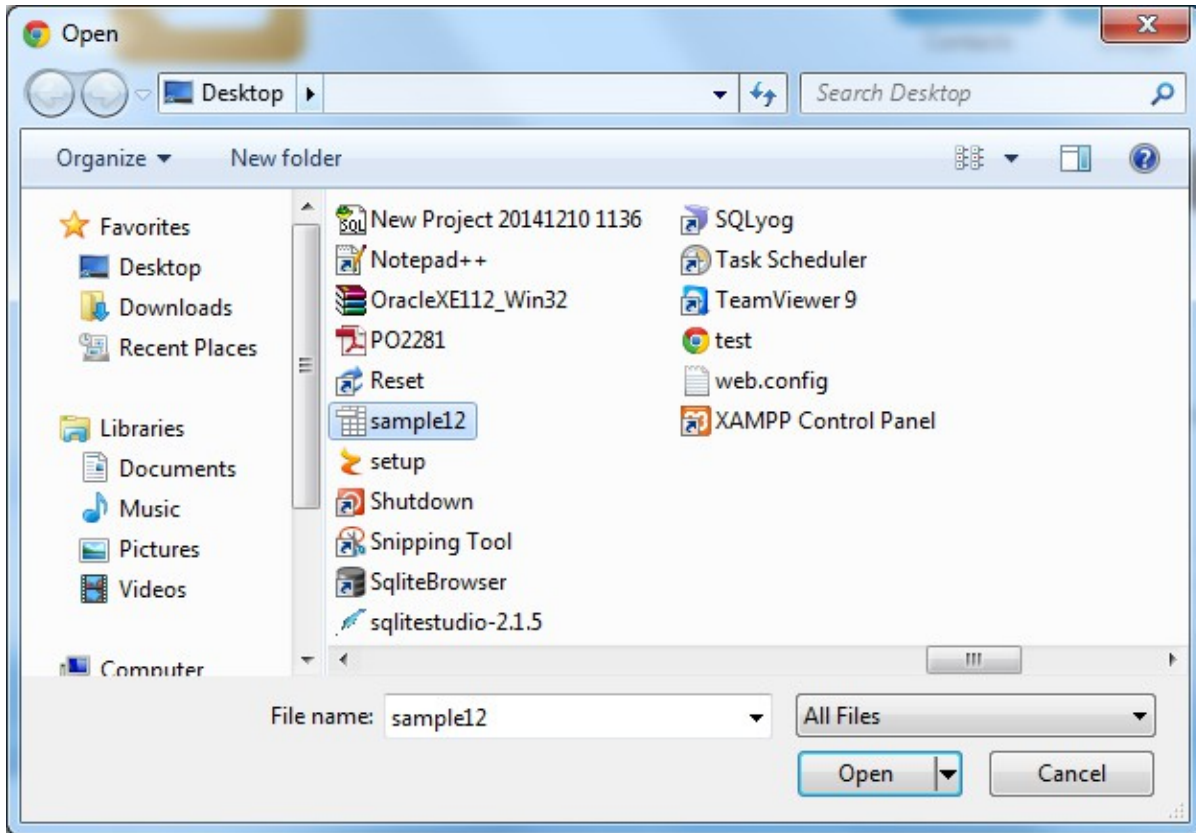
5. And check the status if the file is ready to import.
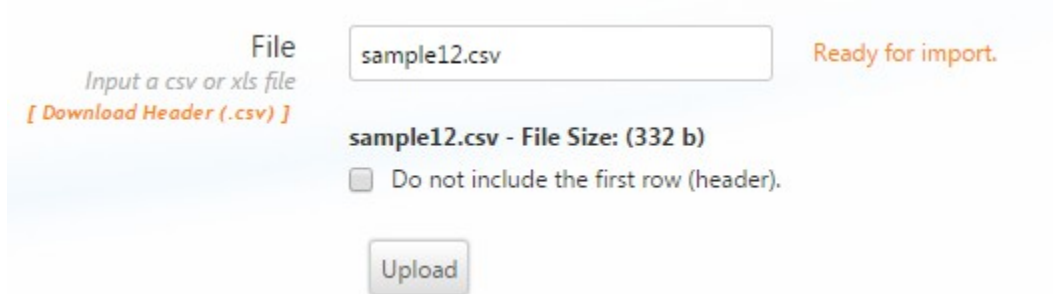
6. Then Pess "Upload"

Block List

ZERIX Text allows you to create a list of numbers that it **will not send** any messages or notifications to.
Zerix Text will **not be able to forward** any messages to these numbers as well.
This list of numbers is called a **Blocklist.**

Block List- Main Screen

Creating Block List

1. To Add Specific number, click on the Mobie number text box and type the specifc mobile number and press Add Mobile Number.
2. To an Existing contacts on block list click the contact name inside the Contact List and press the arrow sign and the existing contact will be added to Blocklisted Numbers.

Custom Fields

Using custom fields User can add an additional details on contacts or additional fields on contact creation.
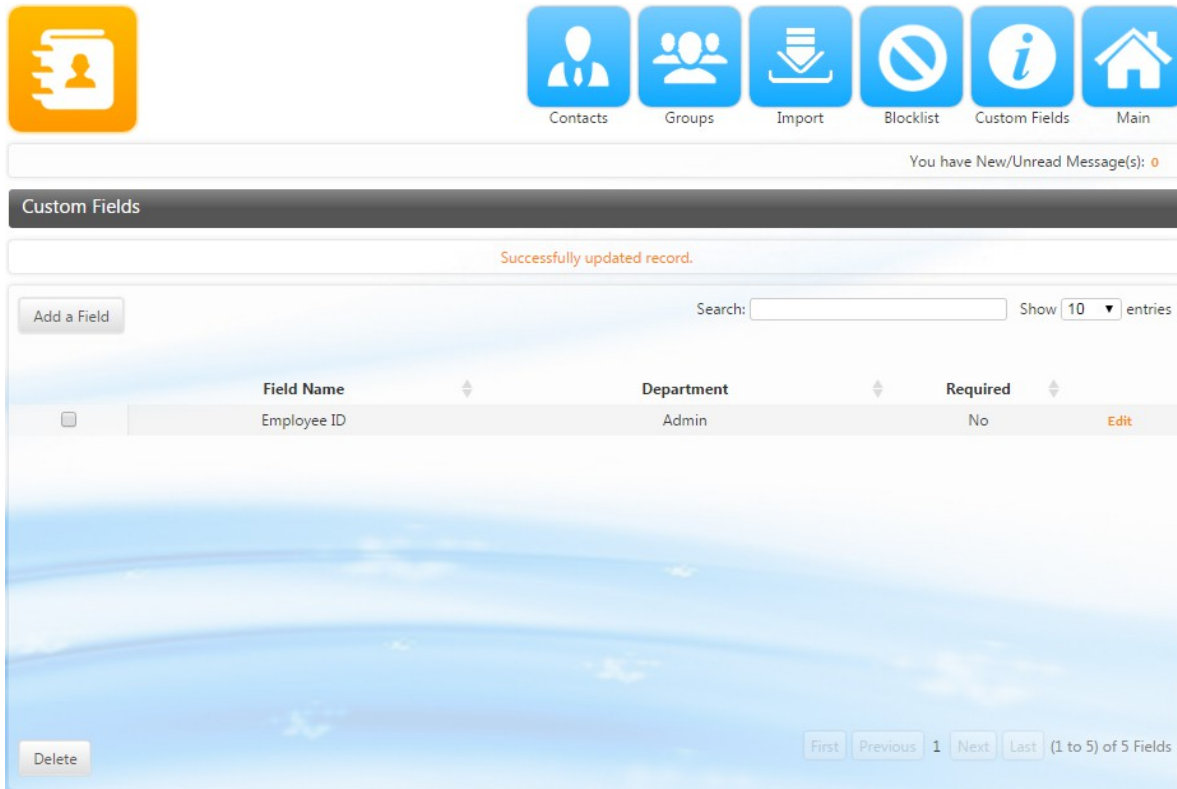
When creating Custom fields.
1. User Department is needed to create additional fields, please refer to. Zerix Setting Guide on how to create Departments.
2. The created field will only appear on specified department when the deparment is selected on contact creation. User can specify if the field is required or not nessary field.

Creating Custom Field

1. Click Add a Field and fill up Custom Field Details. Click the check box if Nessary to fill up the field or leave it un checked if not.

Message

ZERIX Text makes the whole process of SMS messaging easier and more straightforward. You can send personalized messages to a single contact or broadcast to multiple recipients at one click of a button. You can also create message templates to quickly send frequently used messages without having to type it all over again. Your inbox and outbox tasks can be done similar to a typical e-mail application interface.

Compose Messages

This chapter discusses how you can compose and send messages from the **Message Compose** screen.

Message Compose Main Screen
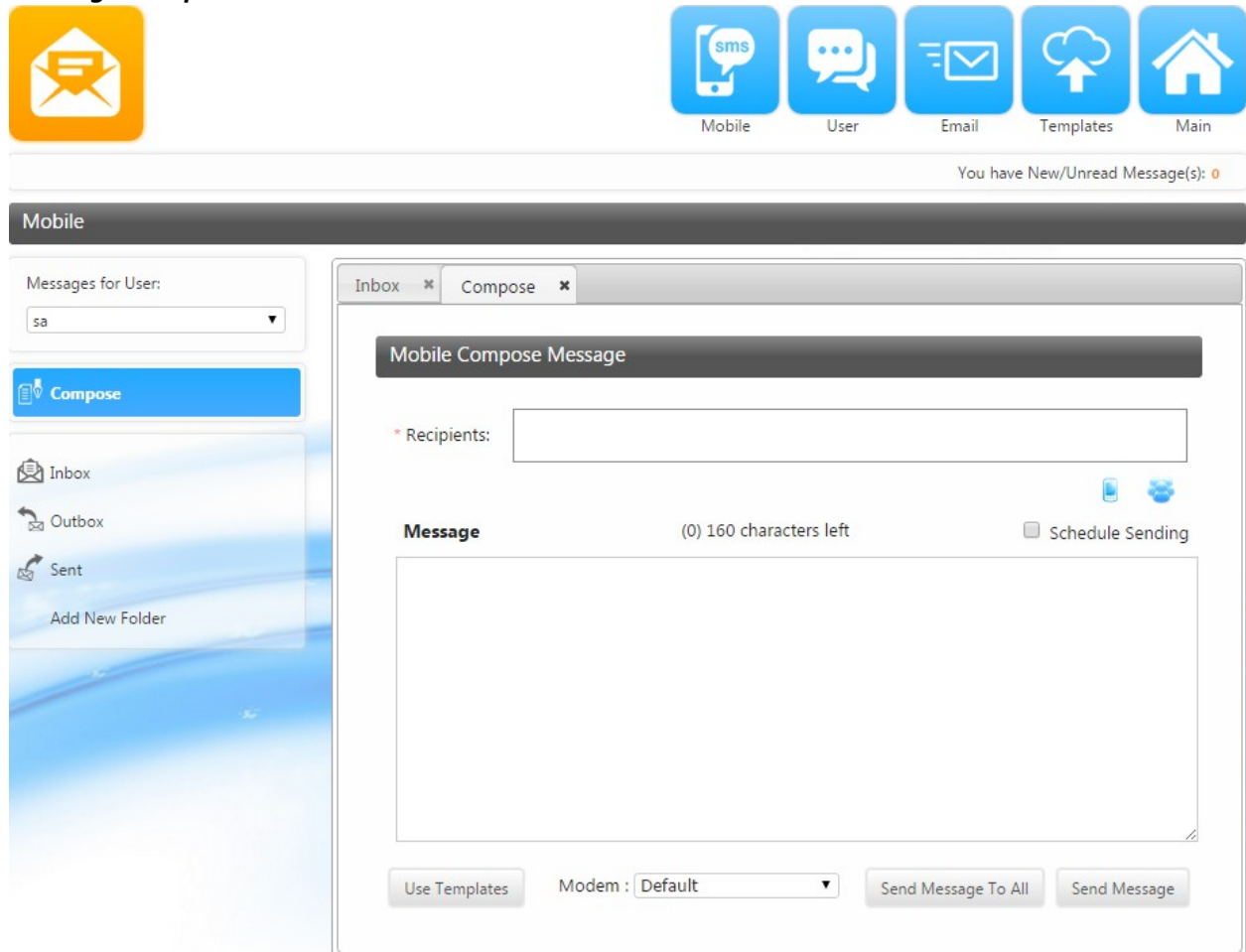
1. Message: where message is composed.

2. Recipients: In recipient text box the entered number or contact name will be automatically searched in the contact list, if the number is not in the contact list it appears as numbers.

3. To search on contact list click this icon   and the Add Recipients page will appear

Click Add to insert the contacts to recipients.

4. To search on Group list click this icon ![icon] and the Group list will aprear.

Add Recipients   **x**

* Recipients:

[   ]

                                                                              📱   ![icon]

![icon] **Groups**   **Send To**

Search: [   ]   Search: [   ]

Group Name ▲	**Members** ⬍		**Group Name** ▲	**Members** ⬍
Marketing	Add

No data available in table

First | Previous | 1 | Next | Last | (1 to 1) of 1 Groups   First | Previous | Next | Last | No groups to show

Add All   Remove All

close

Click Add to insert the Group to recipients.

5. To use the created template click **Use Templates**

Add Templates   x

Message: [date] [time]

Hi [fname] [lname]

Greetings from..

Templates

Search: [_____]   Show 10 ▼ entries

Title	Message	
Greetings	[date] [time] Hi [fname] [lname] Greetings from..	Use

First | Previous | 1 | Next | Last   (1 to 1) of 1 Contacts

close

Click Use to load the template created.
please refer to page 22 for creating templates.

6. User can specify on what modem is used to send the message created.
Click on drop down and choose the modem

Modem : | Default   ▼
Default
Globe Telecom

7. **Send Message To All**   **Send Message**

Send Message To All:
Send Message:

8. Inbox Graphical User Interface (GUI): Where receive messages can read.
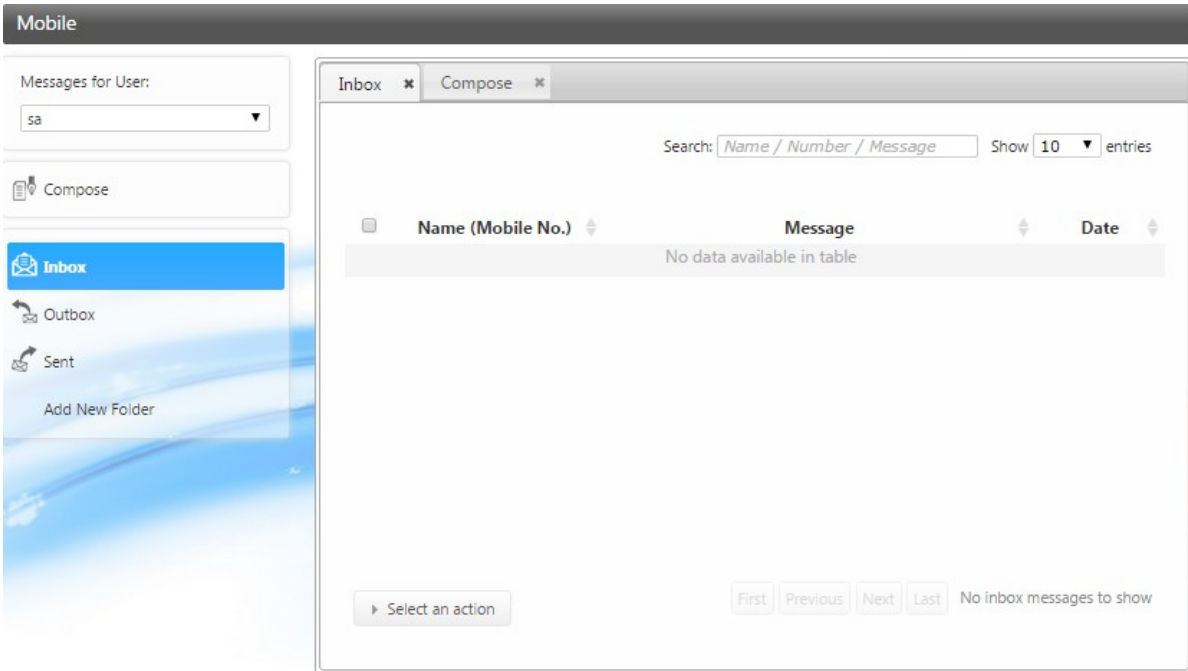
9. Outbox Graphical User Interface (GUI): Where Message being sent is queued.
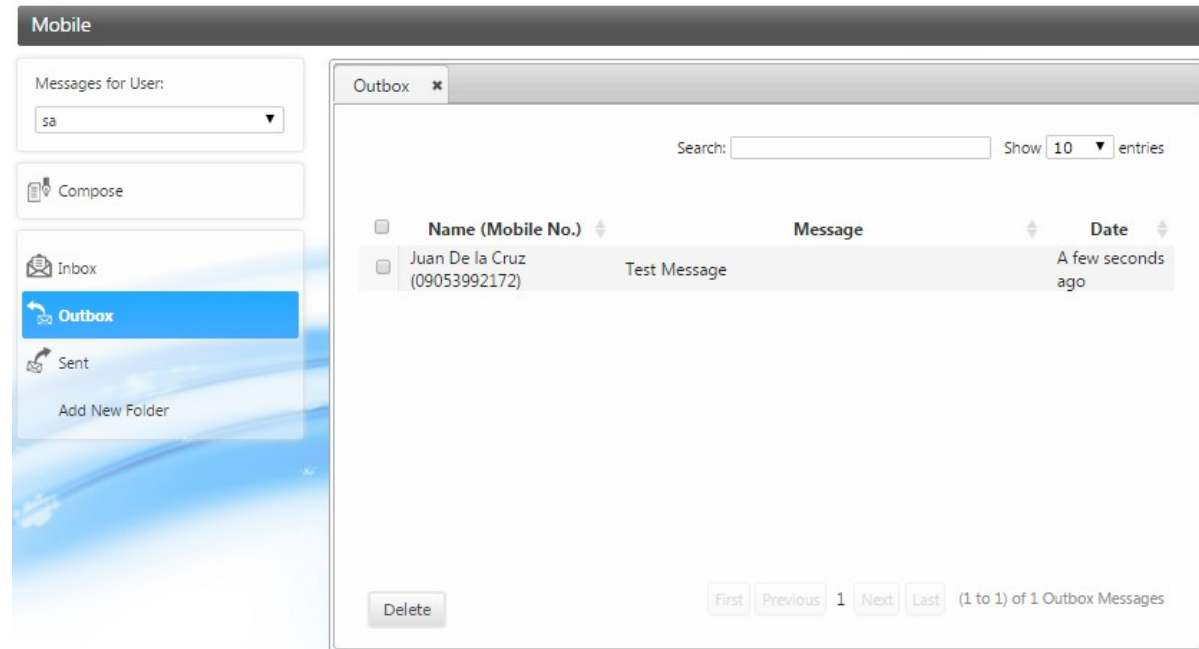
10. Sent Graphical User Interface (GUI): Where user can view sent messages
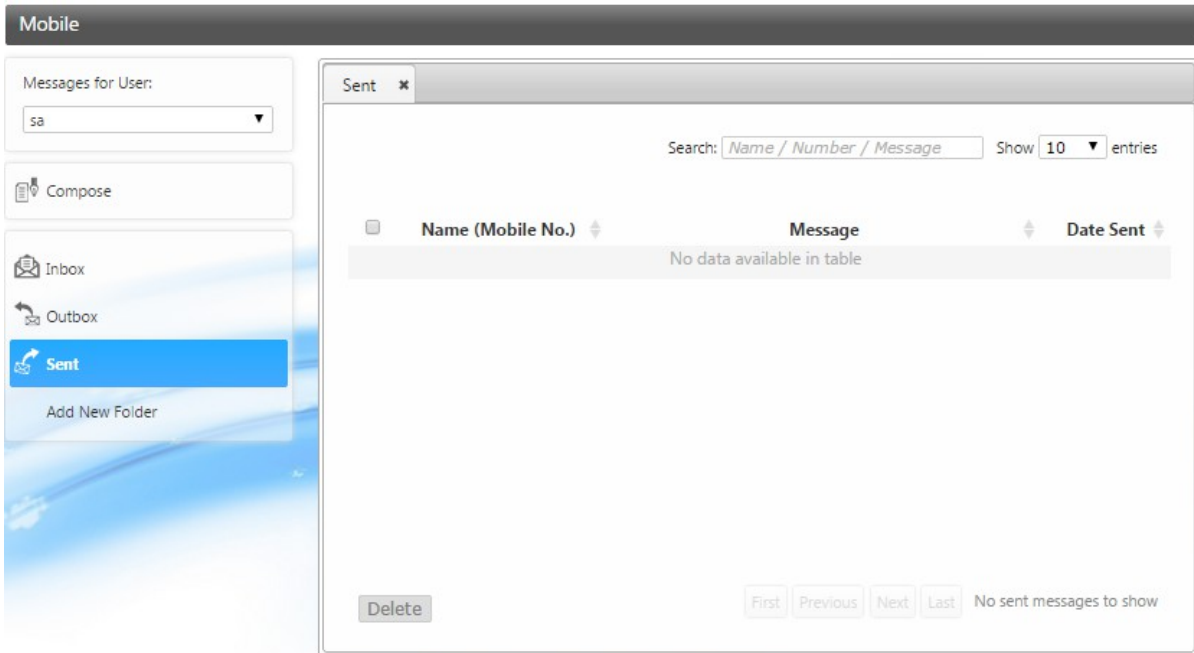
11. To add New Folder (Personal Folder) Press the "Add New Folder" on the bottom left under sent icon.
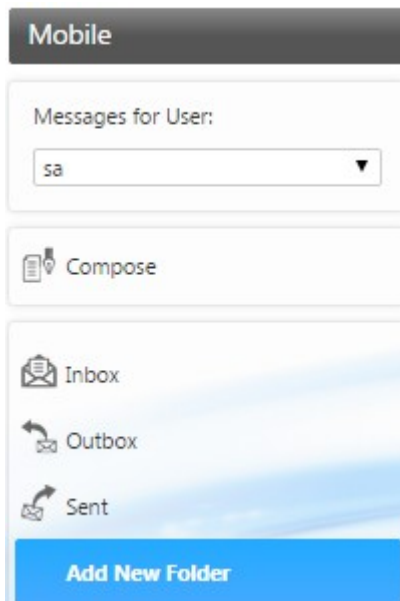
Type a folder name eg: Important. And press   Save
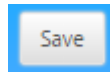
And the 'Important' folder will be created.
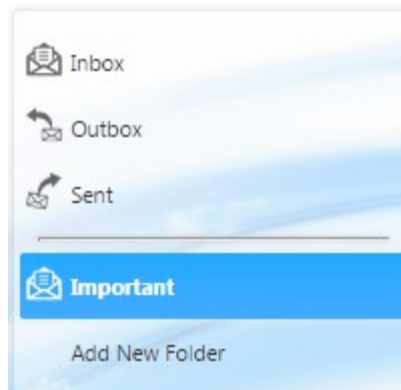
12. Navigate from Inbox Messages and New Created Folder. (Personal Folder)

Inbox / Personal Folder:
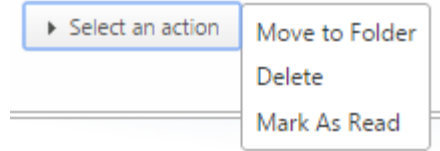
- Move to Folder: To move inbox messages to Created Folder.
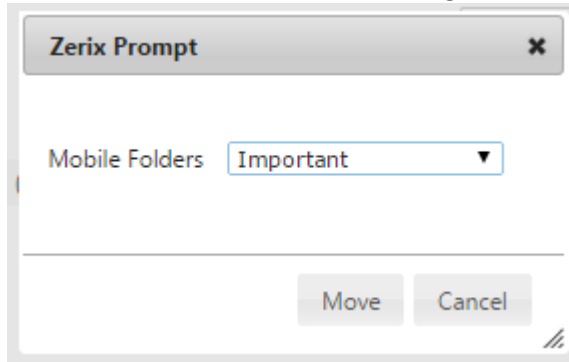
Select on what folder do you want message to be moved and press "Move" Button.

- Delete: To delete selected message / s.

- Mark As Read: Message will be tagged as read.

User

Zerix Text can also sent Private Message within it's user. This is without use of text message. This guide discusses how you can send Private message within Zerix User.
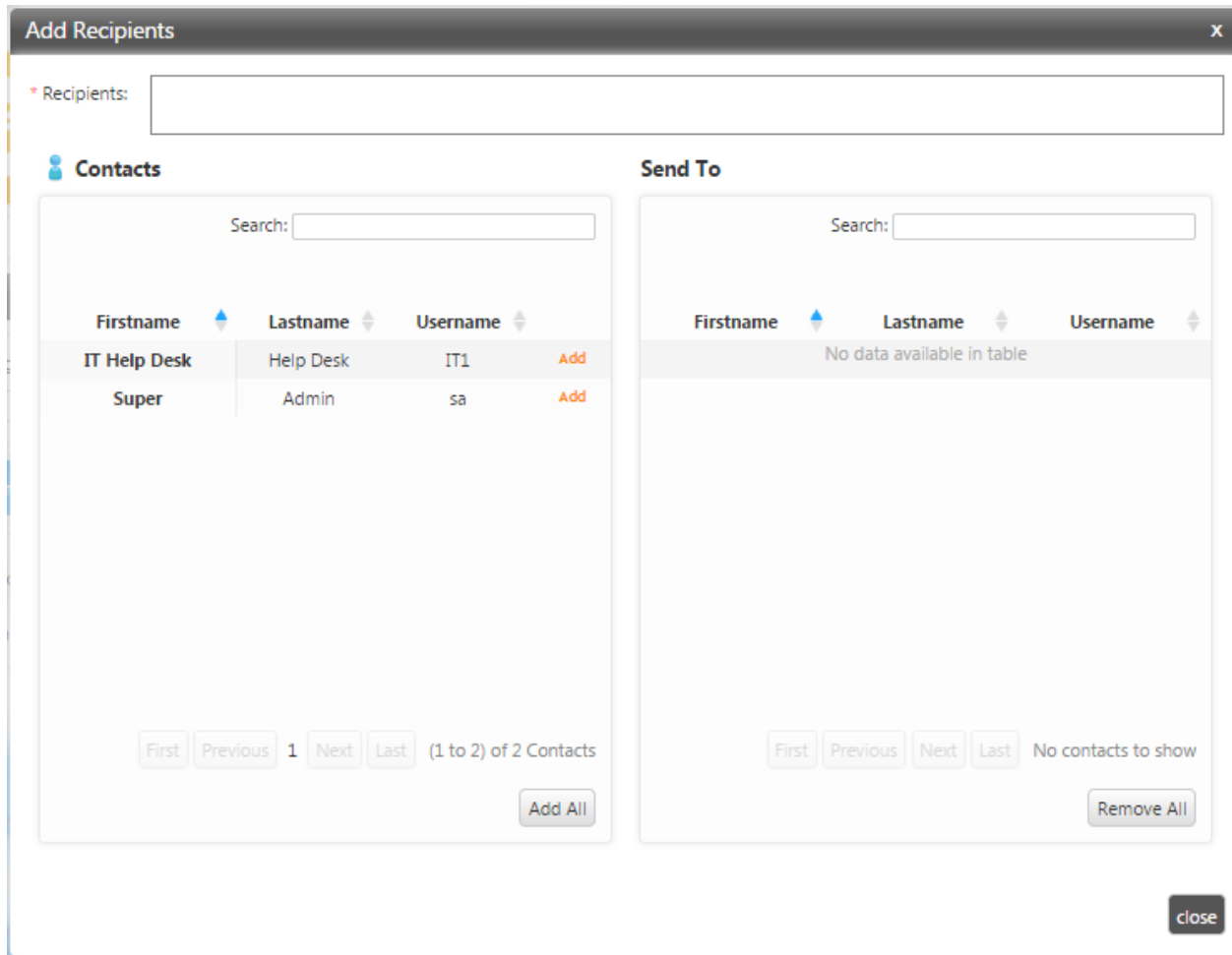
Message Compose Main Screen
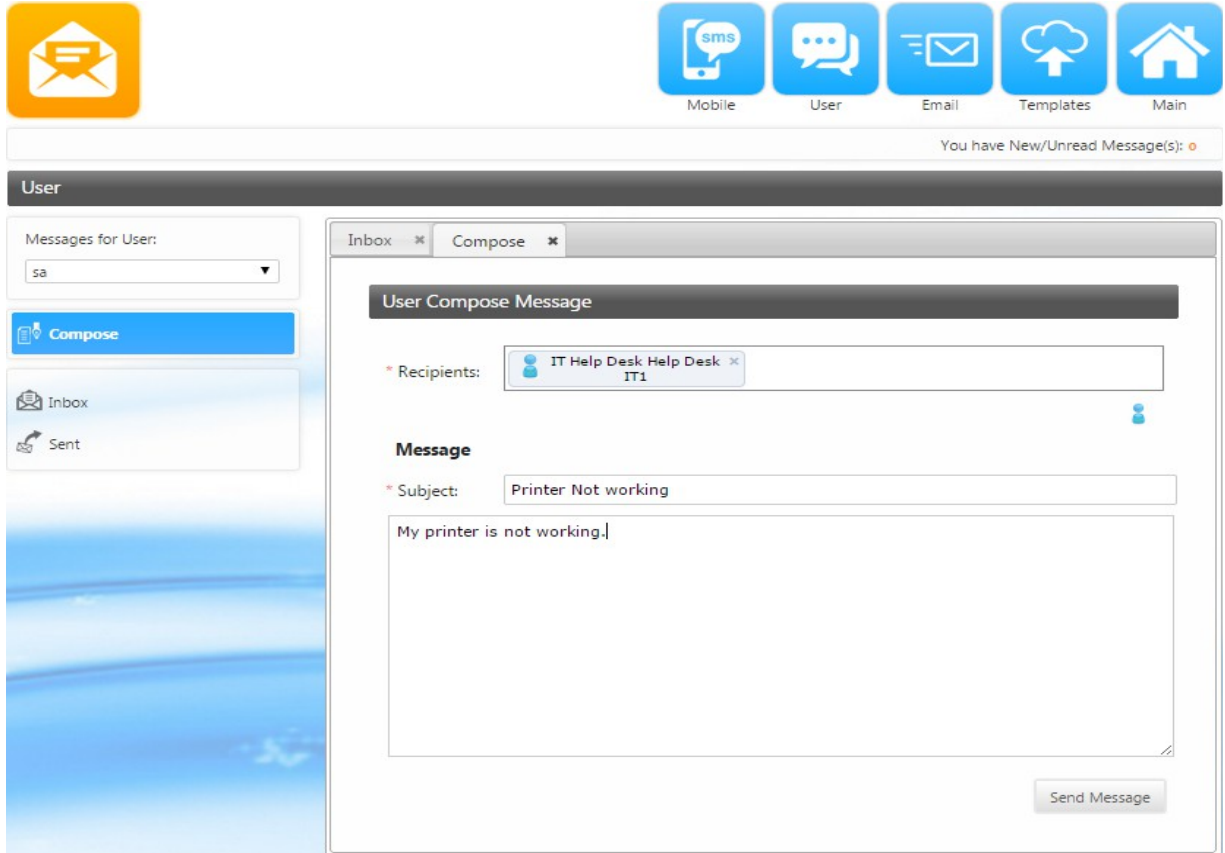
1. Compose: In this tab user can composed messages.
   - Recipients: Recepient must be in the user list.
   - Subject: This is required field, User can't message if subject is blank.
   - Message box / Text box: body of the message.

   To send the composed messages press [Send Message] botton.

To view the full list of user press the ![user icon] botton and and the list will pop up.

Add Recipients   x

* Recipients: [   ]

Contacts   **Send To**

Search: [   ]   Search: [   ]

Firstname	Lastname	Username	
IT Help Desk	Help Desk	IT1	Add
Super	Admin	sa	Add

Firstname	Lastname	Username
No data available in table		

First | Previous | 1 | Next | Last | (1 to 2) of 2 Contacts

First | Previous | Next | Last | No contacts to show

Add All   Remove All
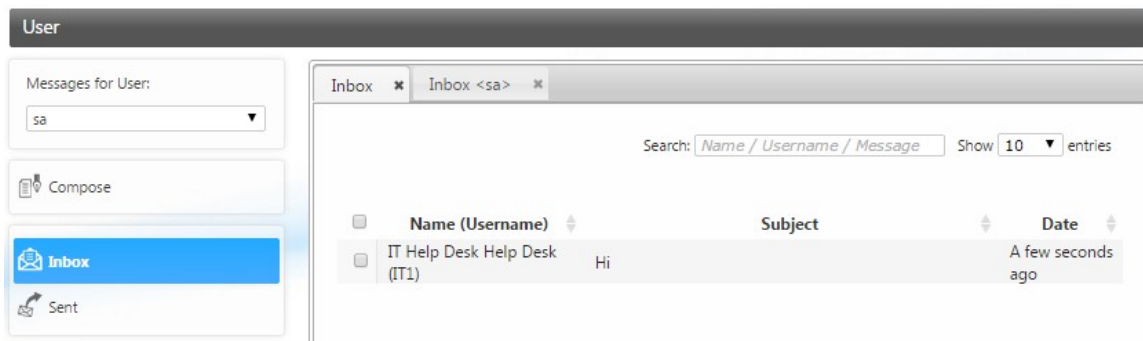
close

Click Add to inset on Recipients list.

2. Inbox:

User

Messages for User:

sa ▼

Compose

Inbox

Sent

| Inbox ✕ | Inbox <sa> ✕ |

Search: [Name / Username / Message]   Show 10 ▼ entries

☐	Name (Username)	Subject	Date
☐	IT Help Desk Help Desk (IT1)	Hi	A few seconds ago

Click the message to view.

Message is in thread format.

Email

Use Zerix Text to send email message, On Zerix Text only one email address can be configured.

Email - Main Screen
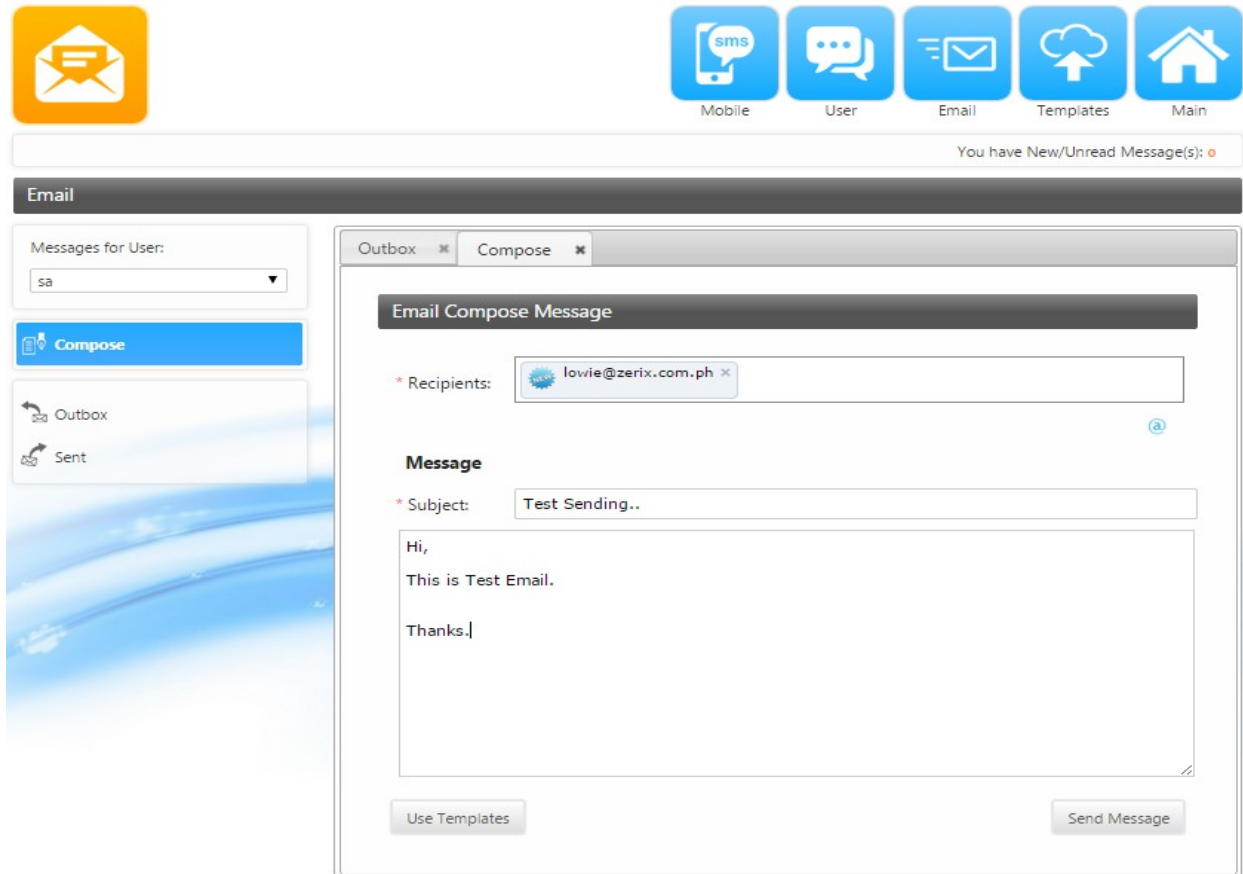
1. Compose: In this tab user can composed messages.
   Subject: This is required field, User can't message if subject is blank.
   Message box / Text box: body of the message.

   To send the composed messages press Send Message botton.

2. Outbox tab: queued messages.
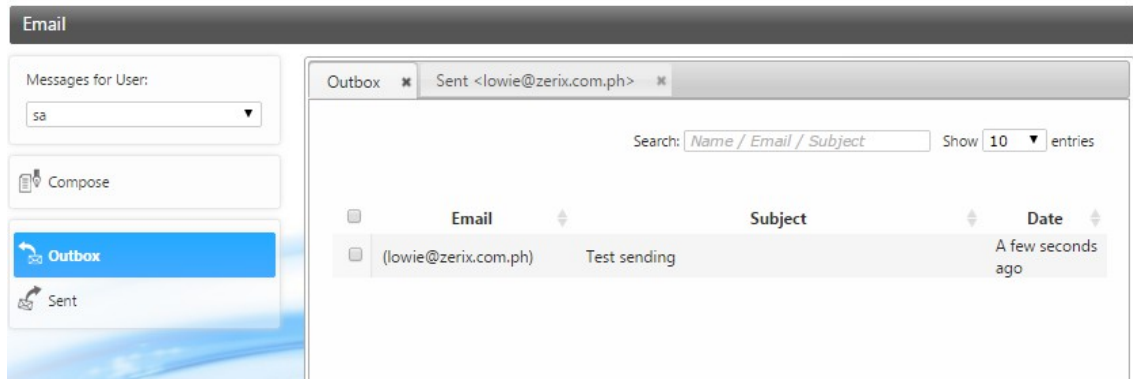
Click on message to check the content.
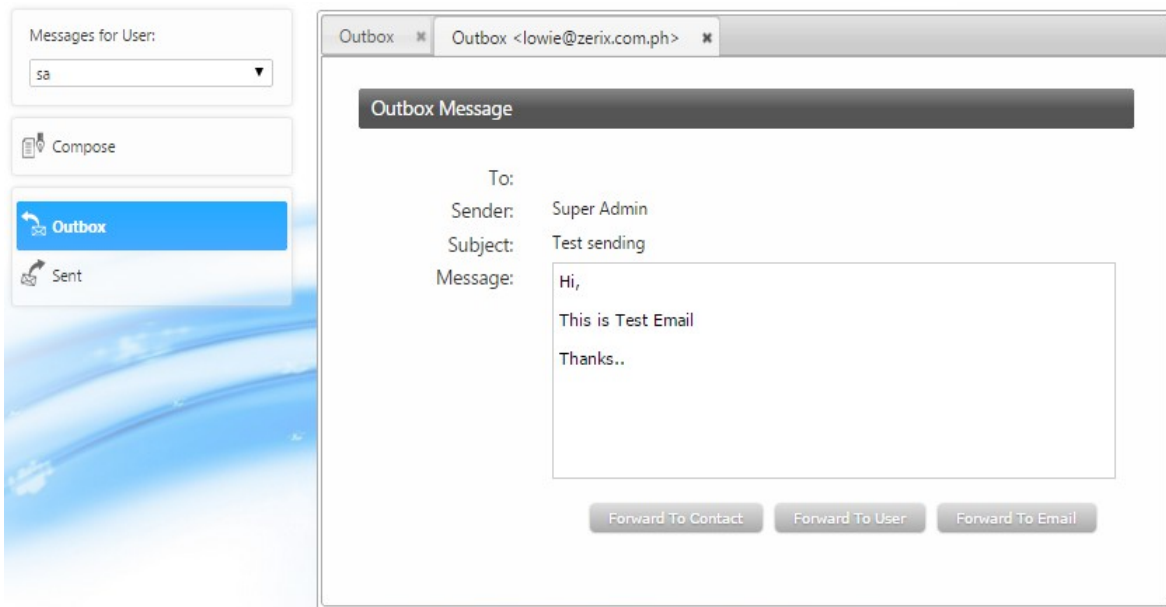
*Forward to Contact: Forward message via SMS.
*Forward to User: Forward message in other Zerix User.
*Forward to Email: Forward message to other Email.

3. Sent Tab: Sended Messages.
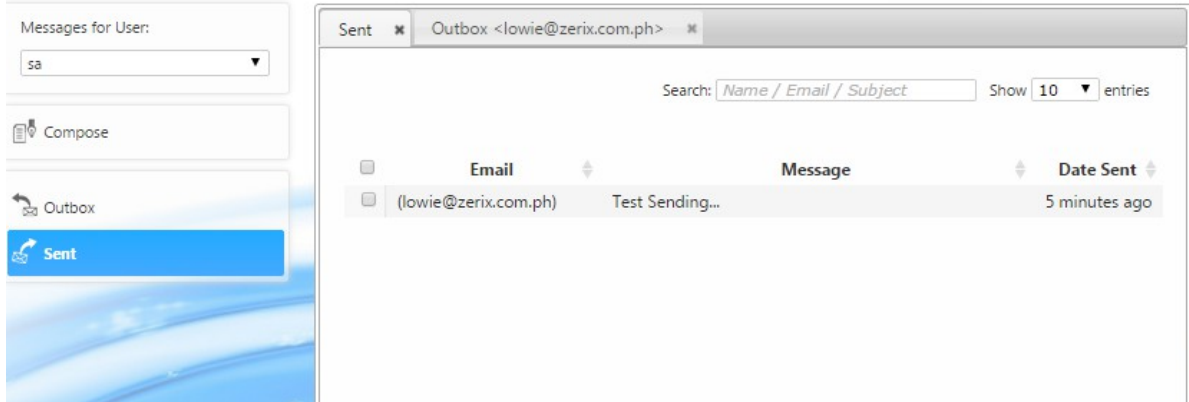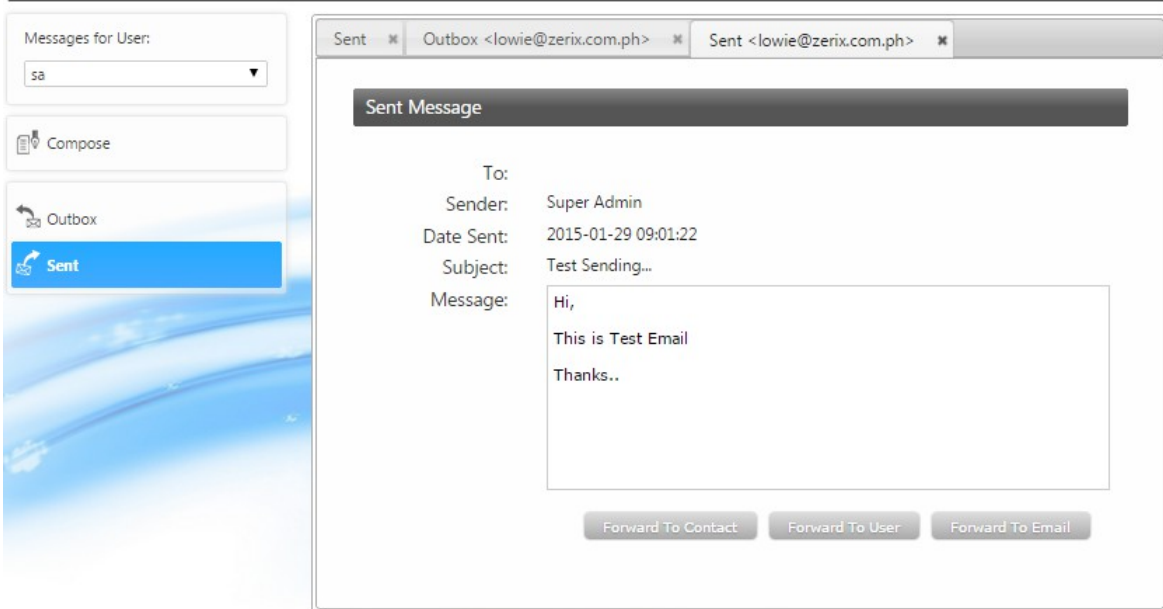
Click on message to check the content.
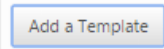
*Forward to Contact: Forward message via SMS.
*Forward to User: Forward message in other Zerix User.
*Forward to Email: Forward message to other Email.

Message Template

Creating template:

1. Press **Add a Template** to create template.
2. Variables: Variable is used to pull out data from contacts created, it can also pull out system time and date. Variable will be replaced by the actual info need when it is send.
   EX. **[date]** variable will be replaced by system date with this format **(dd/mm/yyyy).**

Place Holder	Description	Examples
[date]	Current Date	12/31/2007
[time]	Current Time	12:00 am/pm
[fname]	Recipient's First Name	John
[lname]	Recipient's Last Name	Smith
[prefix]	Recipient Salutation	Mr., Mrs., etc.
[nday]	Numeric Day of Current Date	1 to 31
[cmonth]	Character Month of Current Date	June, July, August, etc.
[nmonth]	Numeric Month of Current Date	1 to 12
[shortyr]	Short Format for Current Year of Current Date	07
[longyr]	Long Format for Current Year of Current Date	2007
[mr_lname]	Title and Last name	Mr. Smith
[mr_fname]	Title and First name	Mr. John
[position]	Position	administrator, user, etc.
[email]	Email of Recipient	email@zerix.com
[cday]	Character Day of Current Date	Monday, Tuesday, etc.

3. Title: Teplate Name.
4. Message box: template body.

Template Information:

* Title: Product Lunching.

* Message:
[date], [time].

Hi, [fname][lname]

We are pleased to invite you to our latest product lunching.

Thanks,

Save   Cancel

Variables:

[date]	Current Date
[time]	Current Time
[fname]	Recipient's First Name
[lname]	Recipient's Last Name
[prefix]	Recipient Salutation
[nday]	Numeric Day of Current Date
[cmonth]	Character Month of Current Date
[nmonth]	Numeric Month of Current Date
[shortyr]	Short Format for Current Year of Current Date
[longyr]	Long Format for Current Year of Current Date
[mr_lname]	Title and Lastname
[mr_fname]	Title and Firstname
[position]	Position
[email]	Email of Recipient
[cday]	Character Day of Current Date

5. Click Edit to edit existing template.

Templates

Add a Template   Search: *Title / Message / Created By*   Show 10 ▼ entries

	Title	Message	Created By	
☐	Product Lunching.	[date], [time]. Hi, [fname][lname] We are pleased to invite you to our latest product lunching. Thanks,	sa	Edit

Keyword

Zerix Text can get information from a database then send the results back to the sender. This allows for more flexible Keyword replies.

Built-in Keywords will allow Zerix Text to return to the sender information found in the Zerix Text database. There are 2 ways that Zerix Text can use to get the database information. It can run an **SQL command** or it can run a **stored procedure**.

SQL commands are set of commands that the database use to retrieve data. These are usually in the form of **SELECT** statements and can return all the data in a table, or just get a specific data from the table.

SQL Stored procedures are database dependent. They vary in form from database to database but provide the same thing to database users. They allow a user to save a series of SQL commands to be executed over and over again without typing the entire set of SQL commands.

External Database connects to database other than the one that Zerix Text uses to store user information and messages.

The database needs to be **ODBC compliant** (Open Database Communication). To allow Zerix Text to connect to an external database, it will need to know what the database is and what drivers to use. Windows already comes with several built-in ODBC drivers. You can check these out by going to *Control Panel -> Administrative Tools -> Data Sources*.

DSN (Data Source Names) can also be used. DSNs are files that hold the database details.
To connect to the external database either specify a connection string OR a DSN. Zerix Text can also use SQL commands or SQL stored procedures to retrieve data once a connection to the database has been made.

ZERIX Text maintains **secure connections** to these databases and does not intrude with any other application or system using said databases.

ZERIX Text allows you complete control over how you want to setup your keywords. It's important to know beforehand the method that best suits the kind of keyword you are setting up. Once you've determined the complexity of the information that will be accessed using this keyword, you'll be able to provide the necessary settings using **ZERIX Text**.

Types of Keyword
Simple Keyword - An automatic reply is sent or static reply .

Built-In Database Keyword - A query or stored procedure from **ZERIX Text database** it is used to run queries from internal SQL Database and also to send valid or invalid responses .

External Database Keyword - A query or stored procedure from **an external database** it is used to run queries from external SQL Database and also to send valid or invalid responses

How to create Simple Keyword (static)

Step 1- **Keyword Details:**
Static Keyword Doesn't need a field. When Creating a static keyword, the required fields are **Keyword Name** and **Keyword Description**.

Step 2 - **Key Word Query Type:**
On **Data Source Type** select **Do not use Datasource (Simple Keyword)** To write the static message on **Automatic Keyword Reply**.

Optional – Users / Recipients
Who can receive this keyword: User Added on list also receives the Keyword texted.

Who can receive this keyword?

If Recipient List is empty, messages with this keyword will be received by Admin Users only

User List

Search: [   ]

Firstname ▲	Lastname ⇕	Username ⇕	
Super	Admin	sa	Add

First | Previous | 1 | Next | Last   (1 to 1) of 1 Contacts

Add All

Recipients List

Search: [   ]

Firstname ▲	Lastname ⇕	Username ⇕
No data available in table		

First | Previous | Next | Last   No contacts to show

Remove All

Who can send this keyword: Only the mobile contact added on the list, can used the created keyowrd.

Who can send this keyword?

If Sender List is empty, everyone can use this keywon

Contact List

Search: [   ]

Firstname ▲	Lastname ⇕	Mobile ⇕
No data available in table		

First | Previous | Next | Last   No contacts to show

Add All

Sender List

Search: [   ]

Firstname ▲	Lastname ⇕	Mobile ⇕
No data available in table		

First | Previous | Next | Last   No contacts to show

Remove All

Forward Keyword: Forward Texted keyword to those number added in the list.

Forward Keyword

SMS Recipients   Email Recipients

Contact List

Search: [   ]

Firstname ▲	Lastname ⇕	Mobile ⇕
No data available in table		

First | Previous | Next | Last   No contacts to show

Add All

SMS Recipient List

Search: [   ]

Firstname ▲	Lastname ⇕	Mobile ⇕
No data available in table		

First | Previous | Next | Last   No contacts to show

Remove All

Use Static Keyword to broadcast announcement

Eg: Keyword for announcement.

Keyword: **ANNOUNCEMENT**(space)[Message] and send to zerix number and Zerix will automatically sends the message to list of recipients created.

Sample announcement.
ANNOUNCEMENT(space)[Message]
ANNOUNCEMENT Classes today are suspended due to heavy typhoon, stay safe.

Step1 Create a Static Keyword with **Message** field.

Step 2. Keyword Query Type: On Automatic Keyword reply, Put a notification message. This message will be the notification that zerix receive the message.

Keywords

Keyword Information

| Step 1 - Keyword Details | Step 2 - Keyword Query Type | Optional - Users / Recipients |

Keyword Query Type

Data Source Type
Do not use Datasource (Simple Keyword) ▼

Simple Keyword Configuration

* Automatic Keyword Reply
Input Keyword Reply (Static Reply)

Message received..

Optional User / Recipients:
Keyword creator can limit the texter that who can use the created Keyword.

Forward Keyword.
The contact inserted on SMS Recipient List will receive the keyword.

Forward Keyword

SMS Recipients   Email Recipients

Contact List

Search:

Firstname		Lastname		Mobile	
		No data available in table			

First   Previous   Next   Last   No contacts to show

Add All

SMS Recipient List

Search:

Firstname		Lastname		Mobile	
		No data available in table			

First   Previous   Next   Last   No contacts to show

Remove All

Creating keyword Internal Database /External Database Keyword (Dynamic)
Eg: Keyword
STATUS(space)[Tracking_number]

Texter:
STATUS 000123
Zerix Reply:
Hi [firstname] , the [status] of [product]

Built-In Database Keyword

Sample data on Zerix Database
Table= Repair

id	tracking	firstname	lastname	product	status
1	123	Juan	Dela Cruz	Printer	Done Repair, For pick up

Keyword Creation

On Field put "**tracking**" the status will represent the status on the database, we'll use the "**tracking**" as field container and will be used to search on the database.

Keyword Query Type.
Select Built-in keyword to store data on built in Zerix database or select External Keyword to store on external database. For external database, database must be ODBC compliant database.

On Direct Query: **#1# r**epresents the **status** column**.**
Valid Message Response: The variable **#1.1#** is represents the **firstname** column, **#2.1#** represents the **status** column and **#3.1#** represents the **product** column.

Note: There is no limitation on zerix columns variables

This variable is used to pull the data on the sql query result.

This variable is used to enter information or input data on Zerix and Zerix will translate it to data that texter inputs.

Invalid Message Response: Zerix will reply this message response if the texter send and incomplete fields/details or the sql query results to null.

External Keyword

On Step 2: Choose Use **External Datasource (External Keyword)** and fill up the external database information and click **"Test"** to test the connection. If the connection is successful **"Connection Successful"** will appear and **"Connection failed"** if not.
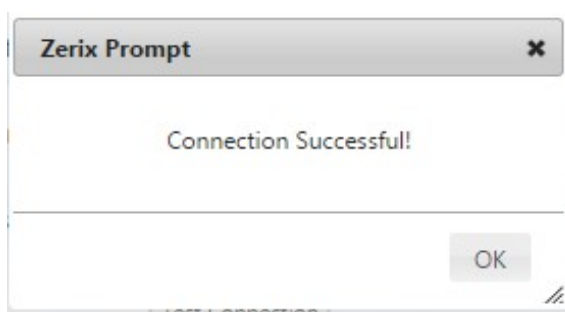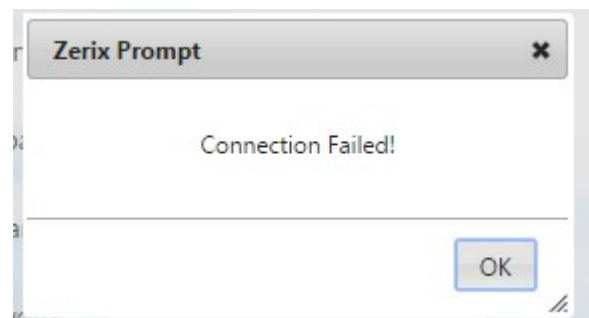

Successful Prompt	Failed Prompt

The **DB Query**, **Valid Message Response** and **Invalid Message Response**, will be the same as the internal keyword.

Using two SQL statements on one keyword.
Zerix keywords allow its user to run two SQL syntax per keyword to lessen the complicated SQL syntax.

Example Keyword flow: Keyword the checking the user record on **"user"** database before inserting into **"sellout"** database and if the texter is not validated invalid message will be replied.

Sample Database:
database name **"User"**

id	firstname	lastname	middleinitial	address	age	gender	mobileno
1	Juan	Dela Cruz	P	Manila	22	Male	9053992173

database name **"sellout"**

id	productname	branch	qty	serial
1	camera	pasig	10	ABC12000

Zerix keyword:

Keyword Details

* Keyword Name	SELL
* Keyword Description *Brief information about the keyword*	test keyword for sellout
Reply Priority	Normal ▼

Keyword Input Fields

Keyword Format	**SELL** [firstname],[productname],[branch],[qty],[serial]
Field Separator	Comma , ▼
Fields *Fields for the keyword* *Hold ctrl to select multiple fields*	[ ] Add Field firstname productname branch qty serial Remove Selected Fields

☐ Allow Multiple Fields

Keyword Structure:
SELL(space)**[firstname]**(comma)**[productname]**(comma)**[branch]**(comma)**[qty]**(comma)**[serial]**

On phone:
SELL Juan,camera,pasig,10,ABC12000
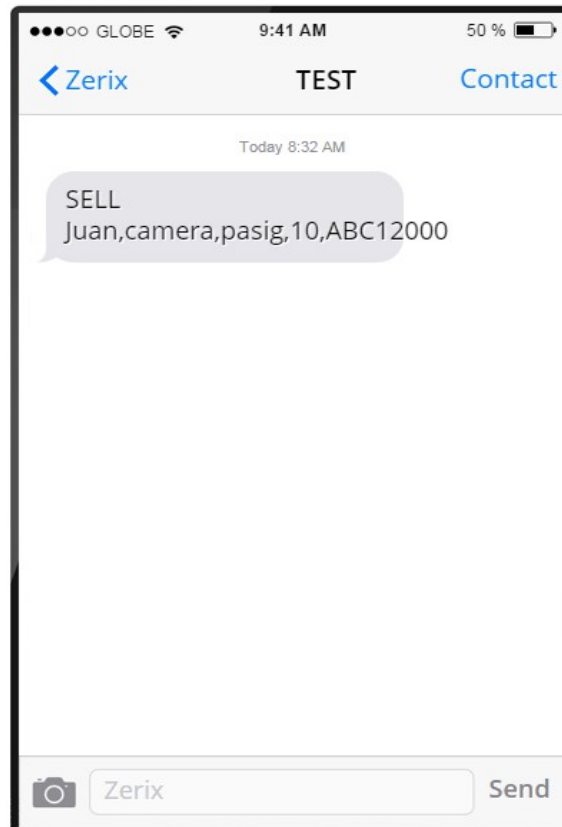
SQL syntax:
(to validate we'll be using the "mobileno" to validate in "user" table)
SELECT firstname,mobileno FROM User WHERE mobileno='#SENDER_NUM#'

#SENDER_NUM# is a zerix variable it is used if pullout the mobile number.

(insert the data entered into "sellout" table if the first query have result.)
INSERT INTO sellout (productname,branch,qty,serial) value ('#2#','#3#','#4#','#5#')

we'll be using zerix special variable **"?upd="** to run the two different SQL query.
Note: "**?upd="** can be only used once per every keyword, this variable will be placed between the two queries without space.

SELECT firstname,mobileno FROM User WHERE mobileno='#SENDER_NUM#'**?upd=**INSERT INTO sellout (productname,branch,qty,serial) value ('#2#','#3#','#4#','#5#')

Sample input on Keyword Query Type:

Keyword Query Type

Data Source Type | Use External Datasource (External Keyword) ▼

External Keyword Configuration

* Database Use | Choose a Database to use ▼

* Server | 192.168.0.116

* Database | DATA

* Username | root

* Password | ••••••••

[Test Connection]

* DB Query
Input SQL Query Statement.

SELECT firstname,mobileno FROM User WHERE mobileno='#SENDER_NUM#'?upd=INSERT INTO sellout (productname,branch,qty,serial) value ('#2#','#3#','#4#','#5#')

[Query Builder]

* Valid Message Response
Input response on successful processing of Keyword's DB Query.

Hi #1.1# your data entry is successful

* Invalid Message Response
Input response on unsuccessful processing of Keyword's DB Query.

Invalid please try again or call XXX-XX-XX for any inquiries.

Samples of what keyword message can do!

1. Collects complains/comments/suggestions
2. Collect votes/surveys
3. Forward an incoming message to one or many mobile users, such as broadcasting that tomorrow is none working holiday
4. Inquire room rates of a hotel
5. Inquire the main menu for the day of a restaurant

6. Inquire product prices

7. Forward incoming message to email

8. Update records of an inventory

9. Track shipping order

10. Update shipping

11. Order products

12. Field personnel reporting to main office

13. Send message to suppliers regarding their approved Purchase Orders

14. Send message to members regarding their application status

15. Broadcast product commercials to mobile users

16. Checks to see if the server or website is up and running or down

17. Switches to stop or start sending messages to a requesting mobile user

18. Inquire monetary value for the day

19. Sends an event reminder to mobile users

20. Inquire email address or phone number of a **ZERIX Text** user