



SMS APPLICATION USER GUIDE

JED-0513

[www | jacques.com.au](http://www.jacques.com.au)

Disclaimer Notice

Every effort has been made to ensure that the information in this document is correct at the time of publication.

Jacques Technologies Pty Ltd shall not be liable for any errors contained in this document, nor for any incidental or consequential damages that may occur in direct connection with the provision of this material.

This document does not constitute a product warranty, express or implied (including but not limited to, the implied warranty of fitness for a particular purpose), or service guarantee.

Jacques Technologies Pty Ltd does not warrant or make any representations regarding the use, or the results of the use, of the information provided within the publication in terms of its correctness, accuracy, reliability, or otherwise. No oral or written information or advice given by Jacques Technologies Pty Ltd (or by its agents, contractors, distributors, or employees) shall create a warranty or in any way increase the scope of this warranty. Some jurisdictions do not allow the exclusion of implied warranties, so the above exclusion may not apply to you.

Jacques Technologies Pty Ltd acknowledges that information in this publication may be unsuitable in various circumstances and disclaims liability for the use of the information in those circumstances.

Copyright Notice

Copyright © 2023 Jacques Technologies Pty Ltd. All rights reserved.

The material in every part of this document, and in its entirety, is protected by copyright.

No part of this document may be used, transmitted, reproduced, translated into another format, or adapted by any means or form, in whole or in part, or for any purpose without express, written, permission from Jacques Technologies Pty Ltd.

No exceptions to these conditions will be made, except as permitted according to Australian and International copyright law. Jacques Technologies Pty Ltd reserves the right to continually improve products and update the relevant equipment specifications and documentation without notifying clients.

Trademarks

Windows is a registered trademark of Microsoft Corporation. Pentium is a registered trademark of Intel Corporation. Other products mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Document Feedback

We value your feedback. To give feedback on this document please email feedback@jacques.com.au

Publication Information

Document Number:	JED-0513
Revision:	1.0
Release Date:	2023-02-09

CONTENTS

1	Introduction	4
2	Requirements.....	4
3	Set Up	4
3.1	Access.....	4
3.2	Users	4
3.3	Internet Connection	4
4	Connection.....	5
5	Contacts	6
5.1	Add Contact.....	6
5.2	Edit Contact.....	6
5.3	Delete Contact(s)	6
5.4	Send Test SMS to Contact.....	7
6	Segments & Epithets	8
6.1	Segments	8
6.1.1	Create Segment	8
6.1.2	Add Contacts to Segment/View Segment Contacts.....	8
6.1.3	Delete Contact(s) from Existing Segment.....	9
6.1.4	Delete Segment.....	9
6.2	Epithets	9
7	Templates	10
7.1	Create Templates.....	10
8	History	11
9	Triggering SMS Based on System Events.....	11
10	Log	12
11	About	12
12	Help	12
	Contact Details	13

FIGURES

Figure 1:	Online via API Credentials	5
Figure 2:	Valid API Connection	5
Figure 3:	Create New User	6
Figure 4:	Update User.....	6
Figure 5:	Send Test SMS.....	7
Figure 6:	SMS Validation	7
Figure 7:	Create Segment.....	8
Figure 8:	Add Additional Contacts to Existing Segment	8
Figure 9:	Remove contact(s) from segment.....	9
Figure 10:	Epithets	9
Figure 11:	Create new template.....	10
Figure 12:	Add New Template with Static & Dynamic Content.....	10

1 INTRODUCTION

The Jacques SMS application facilitates mass text notifications to contacts based on events within the Jacques system. The distribution of SMS's is via API to online SMS distribution providers. Recipient lists (segments) can be created from a master list. Message templates include dynamic and static content. Templates & segments can be used in the configuration file to trigger the sending of SMS based on system events.

2 REQUIREMENTS

The following are required for the SMS application & it's functions

- Version 8 Web Configuration software (webapps-webcfg) v8.00.39 or greater
- Event Controller software (jevent) v8.05.33 or greater
- SMS Application (webapps-sms) v8.00.6 or greater
- Jacques server connected to the internet via gateway

For setup and uploading packages, refer to JED-0505 V8 JELinux Web Interface User Guide section 6.3 – Packages

For more information on Event Controller can be found in JED-0125 (650 Event Controller Software Manual)

3 SET UP

3.1 ACCESS

For more information accessing web applications including SMS refer to JED-0505 (V8 JELinux User Guide)

3.2 USERS

It is recommended to create usernames and roles for each user of the SMS application. This is achieved via the USERS webapp on the dashboard.

For more information regarding USERS refer to JED-0488 (Roles & Permissions User Guide)

3.3 INTERNET CONNECTION

An internet connection is required for the SMS Application.

For more information about connecting JELinux to the internet refer to JCN-0418 (Network Configuration for V8 System Controller)

4 CONNECTION

To begin using the SMS application, you must first set up the method of delivery. A wizard available on the Connection page will guide you through the process.

Presently ClickSend (www.clicksend.com.au) is the available SMS distribution platform. A ClickSend account with credit is required to set up a connection in the Jacques SMS Application.

CONNECTION

To begin using the SMS application, you must first set up the method of delivery. This wizard will guide you through the process.

Method of delivery:

ONLINE VIA API

SMS API provider:

SMS API URL*:

API Username*:

Api key*:

Cancel Save

Figure 1: Online via API Credentials

1. Navigate to the **Connection** page
2. Choose **Online via API** as the method of delivery (default)
3. The Online Via API credentials box will open
4. Enter the required information. Note credentials must be obtained from the SMS API provider by creating an account with them (eg. ClickSend). As Jacques extends it's range of API providers, the required credentials may be different to the above image
5. Click **Save**
6. A correctly established connection shall present a green tick with Valid API details

ONLINE VIA API ✔ Valid API details

SMS API provider: ClickSend

SMS API URL*: https://rest.clicksend.com/v3/sms/send

Figure 2: Valid API Connection

5 CONTACTS

Contacts is a master list of all contacts registered in the SMS application. Contacts can be added to the master list or edited.

5.1 ADD CONTACT

To add an individual contact:

1. Navigate to **Contact** page
2. Click **Add recipient** below contact table
3. In the **Create new user** pop up enter the required details for the recipient. Epithets & Segments can be added (see sections for explanation)
4. Save

Figure 3: Create New User

5.2 EDIT CONTACT

To edit a contact:

1. Navigate to **Contact** page
2. In the contacts table either double click on the row of the contact to open the edit function or single click on the row to display the options & click **Edit**
3. In the **Edit user** pop up edit required details for the recipient
4. Save

Figure 4: Update User

5.3 DELETE CONTACT(S)

To delete a contact(s):

1. Navigate to **Contact** page
2. In the contacts table either double click on the row of the contact to open the edit function or single click on the row to display the options & click **Delete recipient(s)**

5.4 SEND TEST SMS TO CONTACT

A (test) SMS can be sent to a contact or number of contacts.

1. Navigate to **Contact** page
2. Select single contact or multiple contacts from the contacts table
3. **Click Send SMS(s)**. The selected contacts will present in the recipient box. Additional contacts can be added by clicking on the +
4. Type a static message in the **Message body**. Maximum characters allowed is 160.
5. Click **Send**

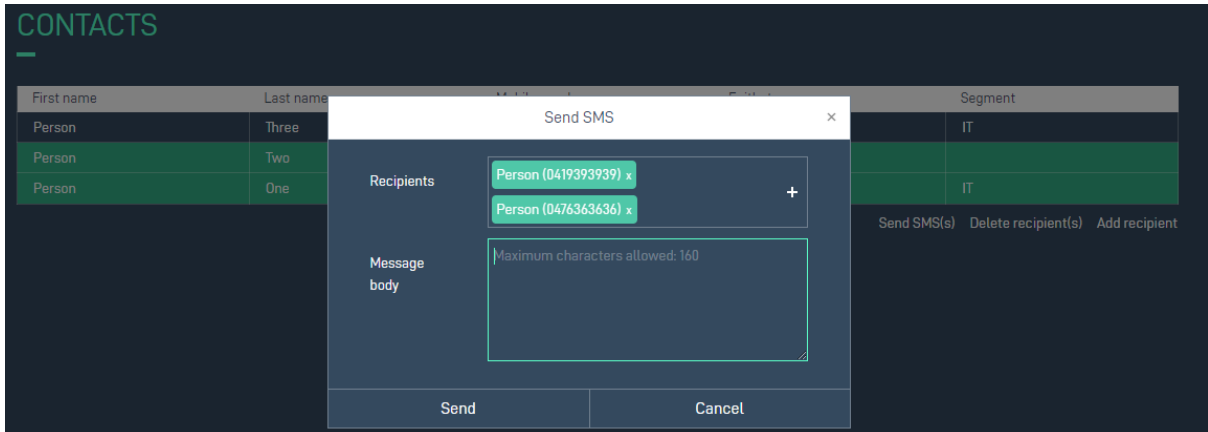


Figure 5: Send Test SMS

A Success message will present advising the SMS was sent. Note the application does not confirm if the SMS was received as the API does not provide this information (Checking delivery status could be a function of the SMS provider).

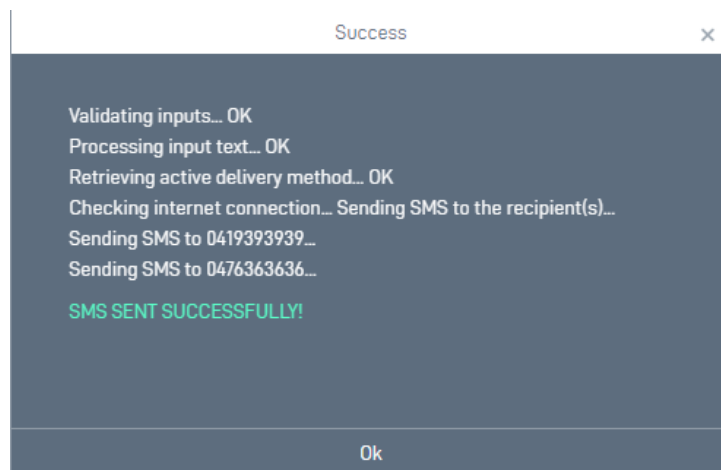


Figure 6: SMS Validation

6 SEGMENTS & EPITHETS

6.1 SEGMENTS

Segments are distribution lists of contacts derived from the master list (usually a subset list). Segments are given a unique short code to define it in the SMS triggering file/step.

6.1.1 Create Segment

To create a segment:

1. Navigate to **Segments & Epithets** page
2. Click **+ Create segment** below segment table
3. In the **Create segment** pop up enter a name to identify the segment. The name will populate the end of the short code
4. Add contacts to the segment by click the + and selecting recipients

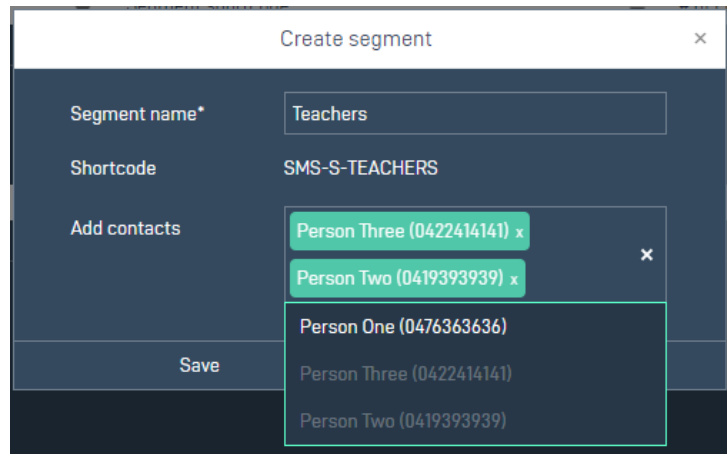


Figure 7: Create Segment

6.1.2 Add Contacts to Segment/View Segment Contacts

To add contacts to an existing segment (or view segment contacts)

1. Navigate to **Segments & Epithets** page
2. Click on the Segment row. The segment row will expand showing the contacts assigned to that segment.
3. Click Add contacts to segment
4. Select the additional contacts by clicking on the +
5. Click **Save**

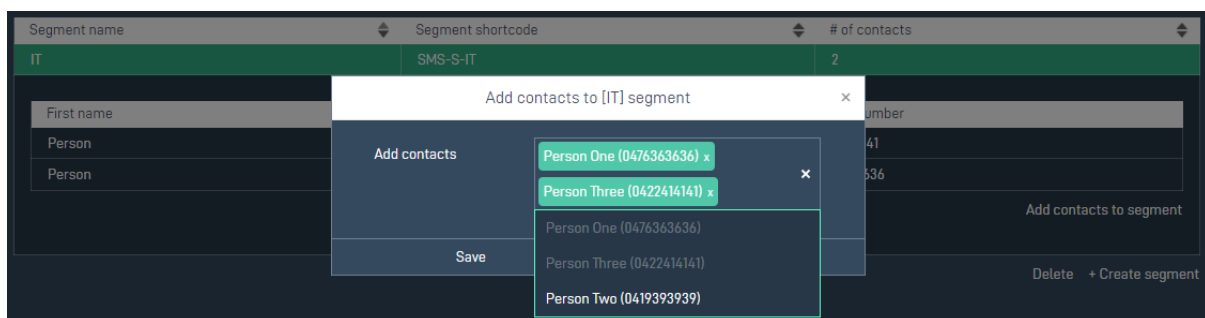


Figure 8: Add Additional Contacts to Existing Segment

6.1.3 Delete Contact(s) from Existing Segment

To delete contact(s) from an existing segment

1. Navigate to **Segments & Epithets** page
2. Click on the Segment row. The segment row will expand showing the contacts assigned to that segment
3. Select row or rows of contact(s) to delete
4. Click **Remove from list**

Segment name	Segment shortcode	# of contacts
IT	SMS-S-IT	2

First name	Last name	Mobile number
Person	Three	0422414141
Person	One	0476363636

Remove from list Add contacts to segment

Delete + Create segment

Figure 9: Remove contact(s) from segment

6.1.4 Delete Segment

To delete a segment

1. Navigate to **Segments & Epithets** page
2. Click on the Segment row to delete. The segment row will expand showing the contacts assigned to that segment
3. Click Delete below the table
4. Confirm deletion. Note deleting a segment can not be undone. Contact do not get deleted when a segment is deleted, they remain in the master Contacts list

6.2 EPITHETS

Epithets are labels or tags used to identify or group contacts. This aids in searching for or creating segments.

Creating, editing, adding contacts, and deleting Epithets is the same as Segments, except with the Epithets table. See above.

Epithet name	# of contacts
Test1	1

First name	Last name	Mobile number
Joe	Bloggs	1234567890

Add contacts to epithet

Delete + Create epithet

Figure 10: Epithets

7 TEMPLATES

Templates provide the content for messages. Content can be dynamic based on events within the Jacques system such as date & time, tag number, (tag) descriptor as well as contact fields (name, number). Static test content can also exist in the message body. Templates are given a unique short code to define it in the SMS triggering file/step.

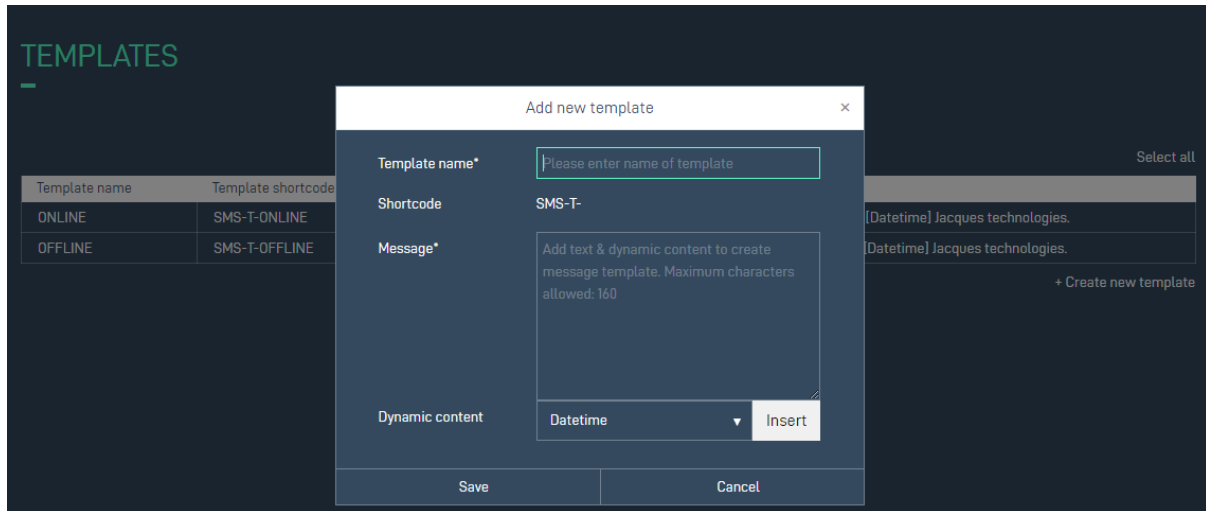


Figure 11: Create new template

7.1 CREATE TEMPLATES

To create a template:

1. Navigate to **Templates** page
2. Click **+ Create new template** below segment table
3. In the **Add new template** pop up enter a name to identify the template. The name will populate the end of the short code and will be un-editable once the template is saved.
4. Add static and dynamic content to create the message. Dynamic content can be added to the message body within static text by selecting the dynamic content element from the dropdown and clicking insert.
5. Save

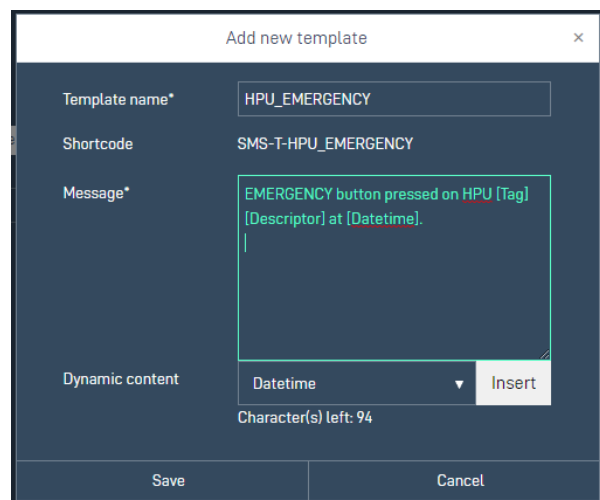


Figure 12: Add New Template with Static & Dynamic Content

8 HISTORY

The history page provides a table of sent messages including Username, Date sent, SMS mode, From, Sent to (phone number), Status & Message (content).

The From column may show Unknown. Depending on the parameters of the API and the API account, the From phone number may be static or dynamic. If the API account is set to dynamic, then the From number will show as Unknown.

9 TRIGGERING SMS BASED ON SYSTEM EVENTS

Triggering an SMS (template & segment/master list) can be configured based on system events. A SMS configuration file (.ini type) is required to be created & added to Event Controller software.

For further information is provided in the following documents:

JED-0505 (V8 JELinux Web Interface User Guide)
JED-0125 (650 Event Controller Software Manual)

Once Segments and Templates are configured they may be included in the SMS message sent.

1. In webcfg navigate to /Applications/Event controller
2. Upload *jevent.sms.ini* as a custom file and **Restart** Event controller

In this example the test is for IPM tag 200 to go offline causing a message to be sent. This test assumes either software or hardware method is active and working.

Example: *jevent.sms.ini*

```
#####
# JEVENT OFFLINE TEST COMMANDS
#####
[tag-state-trigger-offline_200]
tag=200
offline=y

[runcommand-trigger-SMS_OFFLINE_200]
command=/usr/sbin/sms.sh
condition=offline_200
assert-value=200 SMS-S-TESTSEG SMS-T-TESTTEMPLATE
```

Where the input trigger is defined:

- Tag (200)
- Status offline

Where the output is conditional on tag 200 being offline and the assert value is defined by:

- device tag (200)
- SMS-S segment name (TESTSEG)
- SMS-T template name (TESTTEMPLATE)

10 LOG

Features a log of all actions taken by users of the SMS application.

The search feature allows for events to be found. The log can be filtered to only contain actions from one or multiple users. Date range can be changed to the desired range of dates. Data from log can be exported to pdf or csv file for archival purposes (next release feature).

11 ABOUT

This page contains the software version of the application. Provide this to the support team if you require assistance with this application.

12 HELP

A quick setup guide that can be useful to help configure and use certain functionality of SMS application.

CONTACT DETAILS

Ph: +61 7 3846 8400
Email: info@jacques.com.au
Website: www.jacques.com.au

ABN: 48 074 448 712

DOCUMENT REVISION HISTORY

REVISION	DATE	AUTHOR	CHANGE DESCRIPTION
1.0	2023-02-13	RR/AM	Initial release