

Millennium SMS

Setup Guide

Version 1.01

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Using This Guide

This guide explains how to set up the Millennium SMS Service and how to use the text messaging features in Millennium.

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Step 1: Enter Text Messaging Account Details

1. To begin, you must first enter your UpsideWireless Username and Password into Millennium. To do this, we will be going to our **Business Information and Preferences** screen, located at the bottom of the **Data** menu.



 Once you are in the Business Information Screen, you will go to the Preferences Tab, and then the Millennium.SMS Tab, then press Edit. Here you will enter your Username (ID) and Password for your UpsideWireless account. If you do not know your username or password, you can go to http://harms.upsidewireless.com to either reset your password or contact UpsideWireless for assistance if necessary.

C Salon	⊂ Spa	© Salon/S	Spa C Clinic	○ Medi-Spa	C	Others	alon/Spa	1
General H	lours P	references	This Cash Drawer	This Computer	Online B	ooking	SDK	Fields
Options Da	ta Format	Millenniu	m.MAIL Credit Ca	rd/EFT Millenni	um.SMS C	0 Cur	rency	Marketing
confirmation	s or emp	ovees for al	ert notifications. T	o setup an accou	int with Up	ide Wir	eless.	lick on
confirmation the following © UpsideW	ns or emp g link: <u>htt</u> ireless (oyees for al p://harms.u M:Science	ert notifications. T <u>psidewireless.com</u> (UK) Country Co	o setup an accou	int with Up:	side Wir	eless, o	click on
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- 3. Once you have entered youruser name and password you can press **SAVE**, and then press **Verify Account** to test the account.
- 4. In the Account Verification window, enter your 10 digit cellphone number, without dashes. Do not include the 1, as this will be included automatically. Press **OK**.

Upside Wireless Account Verifica	ation	2
Enter the cellphone number you want I	to use to verify your creder	itials.
0001201001	1.	1 1

- 5. If everything in Millennium is correct it will tell you that the test was successful and a message will be sent from Millennium to UpsideWireless. In a few moments you should receive a text message that indicates the same. If you receive a success message from Millennium but you never receive the actual text message, please contact UpsideWireless to troubleshoot.
- 6. Proceed to the next step of the setup.

Step 2: Define Your Confirmation Message

1. Millennium comes pre-configured with a confirmation message that reads as the example below:

Elysium Salon & Spa is confirming your appointment(s) on Wed. 8/14/2013 starting at 2:00PM. Please reply with a Y/YES to Confirm or a N/NO to Cancel.

2. You can modify the "Please reply with ..." portion of the message if you wish. To change this default, press **EDIT** on the **Millennium.SMS** tab of your **Business Information and Preferences** (the same place where we setup your username and password).

C Salo	n CSpa	© Salon/S	Spa Clinic	C Medi-Spa	C	Other Salo	on/Spa
General	Hours	Preferences	This Cash Drawer	This Computer	Online E	looking	SDK Fields
Options	Data Form	nat Millenniu	m.MAIL Credit Car	d/EFT Millenniu	m.SMS (O Currer	ncy Marketing
commina	itions of en	ipioyees for a	lert notifications. T	o setup an accou	it with op	side wirele	ess, click off
the follov	wing link: <u>I</u> leWireless	C M:Science	IDSIDE COUNTRY CO	de 1		side wireit	ess, click off
the follov © Upsid From Na	wing link: <u>t</u> leWireless me	C M:Science	(UK) Country Co	de 1			
the follov © Upsid From Nai	wing link: <u>t</u> leWireless me	C M:Science	e (UK) Country Co	de 1 Format Mes	sage		ess, click on

3. Once you are in **EDIT** mode, press Format Message.

C Salo	n OSpa	Salon/S	Spa Clinic	C Medi-Spa	C Other S	alon/Spa
General	Hours	Preferences	This Cash Drawer	This Computer	Online Booking	SDK Fields
Options	Data Forma	at Millenniu	m.MAIL Credit Ca	rd/EFT Millenniur	n.SMS CO Cur	rency Marketing
commina	cions or em	proyees for al	ere nouncations. I	o secup an account	ic mich opside will	CICSS, LILLA UI
 Upsid 	wing link: <u>h</u> eWireless	C M:Science	UK) Country Co	ode 1		
the follov Upsid From Na	wing link: <u>h</u> eWireless me	C M:Science	UK) Country Co	de 1 Format Mess	age	
the follov © Upsid From Nai ID	wing link: <u>h</u> eWireless me	C M:Science	d	ode 1 Format Mess	age	

 In the Millennium.SMS Message window, you can type in your changes, and then press the Update Fields button to save them and press OK. You will be returned to the Business Information screen, press SAVE.



Note: Please be mindful when making changes that a standard SMS message can only be 160 characters long, this count includes spaces, punctuation, and also your business name as it is entered in your Business Information and Preferences. If you make your message too long, it may be cut off when sending confirmations.

To combat this issue, you can shorten the length of your message, or you can use the "From Name" option in the Millennium.SMS Tab of Business Information and Preferences to shorten the name of your business in text messages. See below for information on how to shorten your Business Name.

 To shorten your business name in text messages, go to Data > Business Information and Preferences > Preferences > Millennium.SMS and press EDIT. In the "From Name" field, enter a shortened name for your business.

General	Hours Pr	; Preferences Th		rawer Th	is Computer	Onlin	e Bool	king	SDK	Fields
Options	Data Format	Millenniu	m.MAIL Crea	dit Card/EF	T Millenniur	n.SMS	со	Curr	ency	Marketing
Willennium.SMS uses Upside Wireless Inc. or M:Science to send SMS messages to clients for appointmen confirmations or employees for alert notifications. To setup an account with Upside Wireless, click on the following link: http://harms.upsidewireless.com										
• Upsic	leWireless C	M:Science	(UK) Count	try Code 1						
• Upsic From Na	deWireless 🔿	M:Science	(UK) Count	try Code 1	Format Mess	age				
Upsic From Na ID	deWireless 🔿	M:Science Passwor	(UK) Count d	try Code 1	Format Mess	age int				

Example: If your business name is "A Millennium Salon and Spa" you can use the "From Name" field to change it to "Millennium Salon & Spa" which will use less letters of your 160 character message limit.

6. Proceed to the next step of the setup.

Step 3: Configure the Millennium SMS Service

 Go to Start > All Programs > Harms Software Inc > Millennium.SMS Service and open the Millennium.SMS Service Configuration. When the configuration screen loads, you should verify that your Millennium data directory is correct, and then enter your UpsideWireless Username and Password into their respective fields. Once you have entered the username and password and verified the database location you can press Apply, and then Yes when asked to start or restart the service.

Millennium.SMS Service Configuration	
Configuration EventLog	
Millennium Data Path	
► C:\Hams\Millennium\	
Millennium Data Path	
C:\Hams\Millennium\	(
Check for new replies every 60 - seconds	
Send errors to:	
Upside Wireless User Name:	
Upside Wireless Password:	
OK Apply	Cancel
Millennium.SMS Service Stopped.	

Note: If you want to receive email notifications whenever there is an error with the Millennium.SMS program, you can enter an email address in the "Send errors to:" field in this configuration. This is not required, but you can enter an email address here if you'd like to be notified of this.

- 2. Once you have entered all information and applied the changes, you can close this window. If asked to restart the service again, you can choose either Yes or No.
- 3. Proceed to the next step of the setup.

Step 4: Configure Clients to Receive Text Messages

1. Go to Data > Clients > Client Information



2. Press the Magnifying Glass icon to search for the client you are setting SMS confirmations for. Search by first or last name, or any other method to find the client, select them and open their Client Profile.

Clients:				45. V					8	×
	Maintenance	Account	Formulas/Notes	Docs/Media	Online Booking	UDF	Listing	e,	Search	++

3. On the client profile, press **Edit**, and then make sure that the clients cellphone number is entered correctly.

Appointments	First Name			ast Name				Post So	rt	
Reversions	Address 1									
🍇 Referral Types	Address 2									
Referral Tree	City			State/Reg	ion	▼ Po	ostal Code	3 - 6		
🖉 User Defined Fields	Home Phone	()	-	Business	()	328		Ext.		
Client Reports	Cell/Mobile	(555)	555-5555	Fax	()	120		0		

4. Once you have entered the cellphone number, you also need to indicate that the client wants SMS/Text Message Confirmations. Next to the "Confirm Appts" checkbox in the client profile is a small icon of a person with a speech bubble over their head. While you are still in Edit mode, click on this button.

Related Info 🛛 🕆 🖥 Client History	Q98 Caractive Restricter	d!	Allow Poir	nts/Rewards erable Addres	■ No Mailing ✓ Primary R ss ✓ Confirm A	js esidor ppts		Interests/Hobbies
Total Points 18,924	Maintenance	Account	Formulas/Notes	Docs/Media	Online Booking	UDF	Listing	Q

5. In the Appointment Confirmations Window, make sure you have **SMS/Text Messaging** selected, and then press **OK**.

Reservation Confirmations		? 🔀
Confirm via Confirm via Confi	Sequence Cell Home SMS Email Auto-Confirm Work Fax	

6. If you would also like to configure this clients setting for receiving SMS Reminders and SMS Marketing, you should click on the **Notify** button in the client information screen.



7. Once the Notification Preferences screen loads, you can select "SMS Reminder" and "SMS Marketing". Press **Ok**, and then save the client's profile.

W Notification Preferences	? 💌
SMS Reminder	
Email Marketing Payment Reminders	
<u> ≪Dk</u> ⊗ <u>C</u> ancel	

8. Proceed to the next step of the setup.

Step 5: Send SMS Confirmations

1. Go to Appointments > Appointment Confirmations



2. In the Appointment Confirmations Screen, choose the day of the appointments you want to confirm next to "Use Appt Date" – this already defaults to the next day. Once you have selected the day you wish to confirm, press Load Clients and it will load all clients that need to be confirmed on the appointment book for that day. After loading the list, press the "SMS Confirmations" button at the bottom of the screen.

Repointment Confirmation	ns:1				
📝 Related Info 🔹	Eormulas/Visits	Use 'Confirm Days in Advance' Employee			
Appointment Book	History	♥ Use Appt Date 8/14/2013 :, Load Clients			
Future Appointments	_	Clients to Confirm			
Standings	First Visit 6/27/2012	Paying Client V Left Msg Contact Email SMS Booked B			
Pendings	Last Visit				
Clients	3/13/2013	KRISTIN			
Services	Primary Employee				
Security		Appt Notes			
1	Confirm Via:	MORGAN - Notes			
2 Help	0 days in advance	Appointment Details Standings shown in red			
	Home Phone	Date Time Client Employee Type Service Resol -			
	Work Phone				
	Email 🕅				
	E Carr				
	() -	• • • • • • • • • • • • • • • • • • •			
	Mobile Phone				
	SMS Message	🗹 Edit/View Client 🛛 💕 🕑 🐨 🏸			
Confirmation Sequence					
	MHSEAWF	Confirmations			

3. The SMS Confirmations window will load, which will list the names and appointment information of every client that is setup to receive an SMS text message. If you wish to send a text message to an individual person on this list, you can click the "Send Message" button to the right of their name in the list. If you wish to send confirmations to every name on the list, you can click the "Send SMS Confirmation Message to All Selected" button at the bottom of the screen.

Note: This screen can also be used to see the current status of sent messages, what time they were sent, and whether or not you received a response text message back from your client or not yet.

8	SMS C	Confirmations									? 💌
	Show a	Appts with s	tatus 🔽	Confirmed	SMS Me	ssage S	ent 🔽 No Mess	sage Sent 🗹 Can	celled 🔽 I	ncorrect Re	esponse
	Select	Paying Clien	t	Appt Date	Message Sent		Status		Confirm ^		
•				8/14/2013	8/14/2013 9:44	B:02 AM	No Response i	received.		Send Mes	sage
											-
1											•
26	Hect AL	Appointmen	t Details								
		Date	Time ▽	C	lient	E	Employee	Service	Res	ource	•
		8/14/2013	02:00P						MASWE	60:Swedish	
											=
		_									
			1 1							,	-
				ſ				Cu	rrent SMS C	redits: 499	95
					Send SMS Co	ontirmatio	on Message to A	Il Selected Curre	nt SMS to b	e sent: 0	

- 4. Once you have clicked the **Send** button of your choice, it will send the message from Millennium to UpsideWireless, and then UpsideWireless will send it to your client.
- 5. Proceed to the next step of the setup.

Step 6: Set Up SMS Reminders

Millennium also has an option to send a Reminder text message immediately after you book an appointment, or make changes to an appointment. Setup of this portion is not required, unless your business has interest in sending these types of instant reminders.

1. Go to Data > Business Information and Preferences > Preferences > Options



2. Press Edit, and then press the Appt Reminder button on the Options tab.

		references	This Cash D	rawer	This	Computer	Onlin	e Bool	king	SDK	Fields
Options D	ata Forma	t Millenniu	m.MAIL Cre	dit Card	/EFT	Millenniun	n.SMS	со	Curr	ency	Marketing
Category A	ppointmen	ts 💌 1	5 mi 🔽 🎟 🔿			Preferen	се			Val	ue 🔺
Centraliz	ed Booki	na	-	Auto-C	Check P	ending Cano	ellation	ns Afte	r Dele'	YES	
Mary A.	not Peaks	0.000 1	Appt	Autom	atically	adjust servi	ice star	t times	in ap	YES	
Max A	ррг воокs	open	Reminder	Display	Appoi	ntment Note	es In Reg	gister	Defa	YES	-
Remove a	ppts older	than 2	months	•							+
Au	ito NOSHO	W after 0	💼 mins	Start W	/eek Vi	iew on Mor	ndav		-	د دما ۹	Cettings

3. In the Appointment Reminder window, to turn on Reminders you need to check the box next to "SMS" and make sure that you are using the *SMS REMINDER* letter as your reminder. This is the default SMS reminder and should not be changed. If you use another letter, messages will not send correctly.

In this screen, you can also choose whether or not you want to send reminders again (after the first reminder) if you make any changes to their appointments. The options are 'Never' to never send anything, 'Prompt' to ask every time you save an edited appointment, or 'Always' to always send a new message without prompting.

Appointment Reminder					
Appointment Reminder Configuration					
Choose the type of reminder to send to clients after creating an appointment					
SMS	*SMS REMINDER*				
	This is a reminder from < <business name="">> regarding your appointment(s) starting on <<appt info<br="" reminder="">WITH TIME>>.</appt></business>				
🗖 Email					
Send reminder after editing an appointment Never Prompt Always					
	<u> </u>				

4. Press **Ok**, then **Save** and close your Business Information screen, and SMS reminders are now enabled.

The setup is complete.