STAR Easy Message

Business departments BusinessSoftware & LifestyleSoftware

Document information

Customer service: www.starenterprise.com/Assistance/ l support@starenterprise.com
Author: Tobias Eichner

Table of contents

Welcome

Thank you very much for purchasing our software !

We are pleased that you decided for one of our products. It's our passion to develop powerful software and exciting games.

[About this manual]

This handbook will help you to become more familiar with our software.

It will explain some of the concepts behind our software and introduce you to the intuitive interface and its fundamental functionality.

Anyway, you can also explore the software of your own - it was our goal to make all features simple and intuitive for everybody.

This user guide contains the following information:

☆ Installation and configuration instructions.
☆ Detailed information about workflows and feature sets.
☆ Overview about available support services and contact details.

We hope you enjoy reading !

The STAR ENTERPRISE software engineering team.

The first time...

The software is ready-to-use instantly - no complex installation required !

1. Unzip the software package on your computer.
2. Move the app folder to any desired location (like your desktop).
3. Execute the software within the app folder.

[Tips and recommendations]

Visit our website at www.starenterprise.com/Assistance/SoftwareCenter/ to read a more detailed quickstart guide providing additional instructions.

Please also have a look at the ReadMe file included in the software package. It contains latest information and will assist you with the first steps to use the software.

Fundamentals - before you start

[Sample data set]

In order to make it easier for you to become familiar with STAR Easy Message, a sample data set is available (like recipient profiles, archive entries and configuration settings).

Use it as **playground for your first experiences** with STAR Easy Message.

[Push messaging services]

STAR Easy Message is a **provider-independent software for bulk and group messaging solutions** using commercial SMS services ("text messaging").

Besides, STAR Easy Message supports many other **communication services based upon push technology**, like paging systems, fixed network SMS and mobile messaging.

Most push messaging services providing an HTTP(S)-based communication interface are supported (please contact your provider our our customer service for details).

The term "SMS gateway" used in this manual refers also to any other platform.

[Text encoding standards]

Letters, numbers, symbols - basically all kinds of characters - are part of larger constructs, the so-called character sets.

Common encodings are Unicode and character sets based upon ISO-8859-x, while Unicode tries to cover most of the world's writing systems.

Tip: The character sets "UTF-8" (Unicode) and "Latin-9 (ISO-8859-15)" are matching most Western European languages.

[Automatic cost estimation]

Commercial SMS gateways are usually subject to charges. According to the agreed terms with your provider, **fees may apply for sending text messages**.

STAR Easy Message can **automatically calculate the estimated costs** for a campaign.

However, the fees finally charged by your provider may differ especially when...

● sending individualised SMS (size of text messages is hard to predict).
● using special chars (special chars may be counted multiple times).
● sending concatenated SMS (additional control chars are required to merge messages).

Failed delivery due to lack of credits (pre-paid services)

If you run out of credits while sending a text message, recipients will be dropped and marked as "failed" in the archived campaign record.

In this case, please check out the button menu "More tasks..." (see view "Archive") to make another delivery attempt as soon as your account has sufficient funds.

Fundamentals - communicating with gateways

STAR Easy Message is **compatible with all SMS gateways and push messaging services** providing an HTTP(S)-based communication interface.

Every time sending a single message, STAR Easy Message will call your provider's gateway using a URL to submit required data.

Typical gateway URLs may look like these ones:

```
http://www.provider.tld/sms-gateway.cgi?user=smith&password=abc&
sender=12345&recipient=0123456789&text=Hello%20World%20%21
```

```
https://www.provider.tld/gate.php?key=abc123&to=0049123456789&
message=Hello%20World%20%21&type=1
```

Both URLs send the string "Hello World !" to the cell phone number 0123456789.

In order to make these URLs universal, values for sender, recipient and message contents must be replaced by placeholders (called "command tags" in the following):

```
http://www.provider.tld/sms-gateway.cgi?user=smith&password=abc&
sender=<.SenderID>&recipient=<.Recipient>&text=<.MessageContents>
```

```
https://www.provider.tld/gate.php?key=abc123&to=<.Recipient>&
message=<.MessageContents>&type=1
```

On the preferences window, you can set up multiple gateways to choose from when sending text messages (to cover different routes, services and even totally different providers).

Please **contact your gateway provider** for instructions and configuration details.

For information on how to send a support request to our **technical customer service**, please see last page of this manual.

Fundamentals - recurring campaigns

[Scheduler for recurring text messaging campaigns]

On the preferences window (tab "Scheduler"), **this feature needs to be turned on first**.

Due campaigns are **searched and sent once a day**. If you interrupt this process, pending campaigns will be sent later automatically.

Archived campaigns created by the scheduler use the prefix "SCHED_".

Recommendation: You should run STAR Easy Message **at least once a day** !

STAR Easy Message can be used on any desktop PC or compatible device. For continuous operation (24/7/365), it should be installed on a server (e.g. virtual machine).

Tip: On a desktop computer, use the autostart feature of your operating system to load STAR Easy Message automatically when booting your PC.

[Dates of delivery]

Absolute delivery date: Fixed date during one year period.
Relative delivery date: Individual date based upon each recipient's list subscription date.

The scheduler will only sent due campaigns of the current date. If you wish to process previously ones, you need to manually handle them.

Fundamentals - data encryption and password protection

STAR Easy Message uses **strong AES-128 encryption** to hide its internal databases from prying eyes. And a **password protection** restricts access to the user interface.

By default, data is encrypted using a hardcoded encryption key and password protection is turned off. You can change this behaviour by **setting an individual password**.

The individual password is requested every time STAR Easy Message launches.

Note on backups: Please consider that restored backups may use a different password.

Emergency password reset

Please keep your password on a safe place, because there is absolutely no way to recover lost passwords. Remember: If you forget your password, your data is lost, too.

Anyway, it's possible to reset the internal databases to their factory defaults by deleting the directory `./Workspace` (located within your application folder).

Fundamentals - tips & tricks

[Campaigns]

● If you wish to **keep a campaign-in-work** for later access, save it as a template.

● Before you officially process a campaign, **send a preview to the administrator** to ensure that anything looks as desired (especially when using individualised contents).

[Campaign archive]

● The archive contains **processed (scheduled) campaigns**.

● **Select an entry to view some statistics**. Text in red colour: Some recipients failed to receive the campaign; text in green colour: Incomplete campaign, please resume delivery.

Configuration - set up your SMS gateway account

Before sending your first text messages, you need to **set up at least one gateway account** and **do some other configuration stuff**.

New to STAR Easy Message ? Please read the chapter "Fundamentals" first.

[Access the software preferences window]

Click on the preferences button (or press F4 key) to **open the preferences window**.

"✗" (or a red indicator) marks mandatory settings.
"✔" (or a yellow/green indicator) marks optional settings.

Configuration - set up your SMS gateway account (continued)

[Messaging gateway accounts]

On the preferences window, move to the first tab and enter your gateway account details.

The **gateway link** contains the URL used to send messages; it must begin with "http://" (unencrypted connections) or "https://" (encrypted connections).

STAR Easy Message uses **placeholders in the gateway link URL** (so-called "command tags") that become replaced with appropriate contents when sending a text message.

These command tags are mandatory:

`<.Recipient>`　　　　　Recipient (e.g. cell phone number, terminal identification).
`<.MessageContents>` Contents of the text message to send.

These command tags are optionally available:

`<.SenderID>`　　　　　Global sender ID (see tab "Appearance").
`<.AdminPhoneNumber>` Global admin's phone number (see tab "Appearance").
`<.MessageID>`　　　　Individual tracking ID, automatically created for each message.
`<.CampaignTagx>`　　Campaign-related individual settings.　　　　　x = 1-5

Any other settings are optional, but recommended to make use of all features.

[Appearance]

Now move to the second tab of the preferences window.

The **administrator's phone number** is used to send previews of text messages.

[Notes on configuration]

● The **favourite gateway** will be pre-selected when writing a campaign and replaces gateways that are no longer available.

● Requesting **account balance** works with most gateways, since it uses an intelligent algorithm to extract the amount even from an alphanumerical string.

● If no specific **return value on successfully sent messages** is provided, the HTTP status code is evaluated instead of (2xx, 3xx = success, others = failed).

● **Delayed transmission** enforces a delay of 0,5 seconds between each sent message. This is required by some gateways.

● **Message tracking IDs** (created by command tag `<.MessageID>`) are available in the delivery report at the campaign archive, using this format: `YYYYMMDDHHMMSSR`

YYYYMMDD: Date stamp, HHMMSS: Time stamp, R: Random number of nine digits

Configuration - set up your SMS gateway account (continued)

[Campaign-specific settings]

Some gateways provide services you want to use on a per-campaign base only, like delayed distribution (scheduled text messages) or special routes.

Insert `<.CampaignTagx>` tags into the gateway URL where appropriate.

Example of a gateway URL:

```
https://www.provider.tld/gate.php?key=abc123&to=<.Recipient>&
message=<.MessageContents>&type=<.CampaignTag1>&scheduleddate=<.Cam
paignTag2>
```

Values for these tags are set **at the time you write a campaign** (see button menu "..." on view "Send campaign", for example).

If you leave a tag's value empty, the tag will be simply removed from the URL.

Tip: Since these settings are stored on templates as well, you can create different templates for your favourite configurations.

You're done ! :-)

Individualised text messaging - the basics

[Contents from recipient profiles and context-sensitive elements]

Messages can contain **individual contents based upon the recipient profile records**.

Placeholders (so-called "**command tags**") are inserted into the text message.

During processing, found **command tags are replaced with matching contents**. If there is no content available for a tag, it will be removed (duplicate space chars are cleaned up).

[How to insert command tags]

Please use the **contextual menu provided by the text input fields**:

Click on the right mouse button while the mouse pointer is placed at the position you want to insert the tag (alternatively: use keys CTRL or ALT on systems with one mouse button).

Note: Command tags are case-sensitive and their availability depends on the message type (see tags listed in the contextual menu of the concerned text input field).

[Command tags at a glance]

Data from recipient profile records

`<.Recipient> <.Salutation> <.FirstName> <.LastName> <.CustomFieldx>`

Data from address list records

`<.ListLabel>  <.ListDescription> <.ListJoinDate>`1]
`<.SubscribedLists>`2]

1] Format: YYYY-MM-DD l 2] Lists separated by comma.

Date and time stamps

`<.LocalShortDate> <.LocalLongDate> <.LocalShortTime>`
`<.LocalLongTime> <.SQLDate>`3] `<.SQLDateTime>`4] `<.ProfileJoinDate>`3]
`<.ProfileLastUpdateDateTime>`4]

3] Format: YYYY-MM-DD l 4] Format: YYYY-MM-DD HH:MM:SS

Other fields

`<.CouponCode>`5] `<.AdminPhoneNumber>`5] `<.SenderID>`5]
`<.BasicProfileText>`6]

5] As set in preferences. l 6] Summary of recipient profile.

Individualised text messaging - custom text modules

[Individual text modules using conditional statements]

Insert custom text modules depending upon the value of specific command tags by using conditional statements.

Custom text modules may contain command tags for creating individualised contents (nested conditional statements are not supported).

Tip: Create conditional statements on the fly with the **built-in assistant**. See contextual menu of the text input fields (click on the right mouse button or CTRL/ALT key on systems with one mouse button).

Scheme of a simple if/then statement:

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
</IF>
```

If the condition is true, the text module `...` will be inserted into the message.

Scheme of if/then/else statements:

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
<ELSE>
...
</IF>
```

If the condition is true, the first text module will be inserted into the message, otherwise the text module followed by `<ELSE>`.

Scheme of connected if/then statements:

```
<IF <.CommandTag> OPERATOR "Value" LOGCON <.CommandTag> OPERATOR
"Value" THEN>
...
</IF>
```

The logical connector `LOGCON` combines two conditions. If the final result is true, the text module `...` will be inserted into the message.

Scheme of connected if/then/else statements:

```
<IF <.CommandTag> OPERATOR "Value" LOGCON <.CommandTag> OPERATOR
"Value" THEN>
...
<ELSE>
...
</IF>
```

The logical connector `LOGCON` combines two conditions. If the final result is true, the text module `...` will be inserted into the message, otherwise the one followed by `<ELSE>`.

Individualised text messaging - custom text modules (continued)

[Available operators (referred to as OPERATOR in the schemes)]

```
CONTAINS            contains (a partial string)
NOT CONTAINS        does not contain (a partial string)
EQUAL               matches, is equal to
NOT EQUAL           does not match, is not equal to
GREATER THAN        greater than
LESS THAN           less than
IS EMPTY            field has no content
MATCH REGEX         matches the pattern (regular expression)
```

[Available logical connectors (referred to as LOGCON in the schemes)]

```
&&        AND (both conditions must match)
||        OR (at least one condition must match)
|||       XOR ("exclusive or", only one condition must match)
```

[Examples]

Query the gender as stored in a custom field

```
<IF <.CustomField1> EQUAL "female" THEN>
For your digital lifestyle... visit www.digitallifestyle.eu !
</IF>
```

Query the year of birth as stored in a custom field

```
<IF <.CustomField2> GREATER THAN "1994" THEN>
This month's special: Liquor, 1-litre bottle only 9,99 € !
<ELSE>
This month's special: Buy one soft drink, get one for free !
</IF>
```

Look for an empty field

```
<IF <.CustomField3> IS EMPTY "TRUE" THEN>
Get worldwide, fast mobile Internet access - the easy way.
<ELSE>
Upgrade your mobile Internet access plan today...
</IF>
```

```
<IF <.CustomField3> IS EMPTY "FALSE" THEN>
Upgrade your mobile Internet access plan today...
<ELSE>
Get worldwide, fast mobile Internet access - the easy way.
</IF>
```

Query two optional fields (connected statements)

```
<IF <.CustomField4> CONTAINS "1" && <.CustomField5> MATCH REGEX
"(premium)|(fan)" THEN>
For true fans only - my new CD with autographed cover.
</IF>
```

Individualised text messaging - custom text modules (continued)

[Important notes]

● Use capital letters for keywords and operators. Condition values are case-sensitive.

● The operator `MATCH REGEX` performs a pattern search on the field's content using regular expressions (based upon Perl compatible regular expressions, PCRE).

Hardcoded options for regular expressions: Non-greedy, case-sensitive; period character "." matches everything except a newline.

● The operator `IS EMPTY` allows only two values: `TRUE` (match) or `FALSE` (no match).

● Invalid conditional statements (provided that they have been recognized), will not be processed but removed entirely from the message.

● It's not possible to predict the length of an individualised message precisely, so message length and campaign cost estimations are some kind of an educated guess.

[Validation of individualised messages]

Send a preview before finally posting your text message to the list !

This will check all included command tags and conditional statements to prevent logical errors; the result is send to the administrator's phone number.

Possible results for command tags:

● Valid tags are amended by the string "Okay".
● Command tags not recognized are left untouched.

Possible results for conditional statements:

● Valid statements will always return the first text module.
● Invalid, but recognized statements are removed from the message.
● Statements not recognized are left untouched.

Individualised text messaging - coupon and rebate codes

[Prerequisites]

Open the configuration window of the software to set the intended coupon code style:

● The style "Four digits" generates simple numbers in the range of 1000 to 9999.

● The style "Hexadecimal RGB colour values" can be used for advertisement campaigns, because it produces colour values you may combine with sweepstakes or contests.

● The style "ID with date and checksum" is intended for higher-grade coupons or limited time offers and comes in the format `MMYY-YYDD-RRRR-RRRR-CC`.

MM: Month, YYYY: Year, DD: Day, RRRR: Random number, CC: Horizontal checksum

[Insert coupon codes into messages]

Use the command tag `<.CouponCode>` to insert a coupon code. You can use the tag several times, it will always show the same unique code per message.

Go to the campaign archive to view a delivery report with abilities to save and print the list of recipients and associated coupon codes. These can be also exported as tab-delimited data file for use in third party applications.

Data exchange

[Import of recipient profiles]

Data import is supporting text-based source files encoded with Unicode (preferred) and character sets based upon Latin-1 to Latin-9 (ISO 8859-x).

Before starting the import process, a backup of the internal databases is created.

"Smart detection of phone numbers" is an intelligent algorithm that extracts phone numbers from any text-based document (valid elements: 0-9, (,), -, /, spaces).

"Set of records - tab/CRLF scheme" requires the following scheme:

```
Phone number<Tab>Salutation<Tab>First name<Tab>Last name<Tab>
Custom field 1<Tab>...Custom field5<CRLF>
```

"+ update: address list": Import new profiles, subscribe all (!) profiles to the selected list.
"+ update: all fields": Import new profiles, synchronize existing profiles.

Notes on import

● The source file contents must **strictly match the above scheme**.

● **Custom fields at the end of records** are optional and can be skipped (you don't need to fill the record with tab chars).

● The source file is **not allowed to contain headlines** (as some spreadsheet apps do) **or any other additional data** not matching the above scheme.

[Export of user profiles]

Export files are always encoded in UTF-8 (Unicode).

Supported data formats

Tab/CRLF: Fields separated by tabulators, records separated by line breaks (this is the recommended format for exporting data to third party applications).

CRLF/2CRLF: Fields separated by line breaks, records separated by double line breaks.

XML: XML-like scheme (internal, non-official standard).

Troubleshooting tips

Many issues can be fixed easily by understanding how the software works. In this chapter, we are going to explain typical problems, their causes and possible solutions.

If you still need assistance, **please contact our customer service**.

[Software health report]

STAR Easy Message comes with **internal logging and reporting features** providing valuable technical information for troubleshooting purposes.

See application menu, entry "Administration" to open the software health report window.

[Network-related errors and gateway connection issues]

● Check your account configuration carefully.

● Disable firewalls and malware detection tools or add a whitelist entry, where necessary.

[Failed message delivery]

● Check your network connection.

● Restart the campaign (see view "Archive", menu "More tasks...").

[Failed import of recipient profiles]

● Source file must be encoded using an supported character set: Unicode (UTF-8, UTF-16LE/BE and UTF-32LE/BE), Latin-1 to Latin-9 (ISO 8859-x).

● If not using smart detection, ensure that the record scheme is matched (no headers, no empty lines allowed in the source file). See status window for specific error message.

[Incorrect display of messages (on user devices)]

● Try a different encoding scheme. UTF-8 or Latin-9 (ISO 8859-15) are recommended.

● Contact your gateway provider or the manufacturer of the user device for known issues.

Due to the wide variety of user terminals, there is no guarantee that submitted special characters are handled properly (even if supported by the gateway).

Customer service, help & support

Customer service: www.starenterprise.com/Assistance/SoftwareCenter/

Our support website provides resources covering these topics...

☆ Quick-start guides (help with installation, instructions for getting started easily).
☆ Frequently asked questions (including answers ;-), technical support.
☆ Information about available updates and bugfixes.

Technical support by e-mail: support@starenterprise.com

[Priority support for customers owning an active license]

In order to allow preferred handling of your inquiry, we need to know your license ID. Please always include your license ID with every request !

See Assistance menu of the software for license information (or have a look at the license document received upon purchase).

Backups and data recovery

Please ensure to perform regular backups of your data !

More information about backups in general and how to restore lost data is available on our support website.

License information

License ID	
License owner	
Location of use / Host	

Space for your own notes