



# Enterprise Feedback Suite

## EFS SMS Extension

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# 1 EFS SMS Extension

EFS SMS Extension allows to send SMS and WAP Push messages from inside EFS. The messages are entered and sent via the familiar EFS mail dialog. The technical execution of the transmission is carried out by an external service provider.

The functional scope in brief:

- Customers with an own installation hosted at QuestBack can optionally lease the EFS SMS Extension. On group installation, this extension is not available. For customers who are hosting externally, it is unfortunately not available either.
- To order the required amount of SMS, please get in touch with your QuestBack Sales contacts. They can also provide a current list of prices.
- The dispatch is handled by the external service provider TynTec (<http://www.tyntec.de>). The costs are calculated per dispatch attempt.
- You can send messages from participant administration in personalized projects, from panelists administration, panel groups and panel samples. In anonymous projects, the dispatch function is not available. Sending messages from other menus, by triggers or other features is not possible either. Furthermore, SMS and WAP-Push messages cannot be stored in mail templates.
- For each participant, one mobile phone number can be stored in participant administration.
- When writing SMS and Wap Push messages, you have to respect special restrictions of length and character set. EFS SMS Extension includes various checks which help you to follow the rules.

This manual introduces the features of EFS SMS Extension:

- Chapter 2, *p. 6* explains how to write and send SMS and WAP Push messages.
- In Chapter 3, *p. 9* you can find advice regarding the management of SMS dispatch for your installation.

This document describes the EFS SMS Extension in EFS 10.0.



From EFS 9.1, SMS dispatch can be switched from TynTec to another SMS provider. This option is of interest for customers who have contracts with another SMS provider.

- Choice of the provider, price arrangements and billing are organized by the customer. QuestBack will only provide the technical part.

- The change requires special programming.

- Dedicated comfort features for TynTec (e.g. length and format checks) are not available when using other providers.

If you are interested in using this option, please get in touch with your QuestBack contact.

# 2 Sending SMS

## 2.1 Storing Participants' Phone numbers

The mobile phone numbers of participants are stored in the variable “u\_mobile”. From EFS 7.0 on, this variable is available per default in new personalized projects and employee surveys. In panelists administration, it has already been a default variable before.

The mobile phone numbers of the sender and of the receiving participants or panelists must be formatted according to international formatting rules:

- A total of eleven digits
- Two zeros at the start
- Country prefix, e.g. 49 for Germany
- The number itself.
- Example: 0049223379336.

For participants in personalized projects, the validity is checked from EFS 7.0 on. For panelists and admin accounts, there is no check implemented.



When exporting and importing participant data, mind that the “u\_mobile” column of the Excel file should be formatted as “Text”. Otherwise the two leading zeros are removed.

## 2.2 Defining the Content of Messages

When writing SMS and Wap Push messages, you have to respect restrictions regarding text length and character set. EFS SMS Extension includes various checks which help you to follow the rules of QuestBack's standard provider TynTec.

### SMS

For SMS, the following restrictions of length and character set apply:

- A normal SMS can have up to 160 western-european characters. If the SMS text is longer than permitted, it will be distributed on several SMS automatically. Up to 9 SMS with 153 western-european characters each are available for one text. Each of these follow-up SMS will be billed separately.
- If e.g. cyrillic or chinese characters are used, only 67 characters are available per SMS. If a split of the text is necessary, up to 9 SMS with 67 characters each are available. Each of these follow-up SMS will be billed separately.
- If UTF-8 characters can be displayed, depends of the mobile device.
- Most mobile devices are not able to process word wraps in the text. Therefore, word wraps are automatically removed when saving texts.
- If wildcards are used in the SMS text, please mind that the length of the text can change from message to message.

### Wap Push messages

For WAP Push messages, the following restrictions of length and character set apply:

- The message can have up to 115 characters (incl. URL) and should consist of western-european characters only.
- If the text contains a URL, it will automatically be marked as the URL to be communicated.

## 2.3 Entering and Sending SMS

SMS and WAP-Push messages can be sent from participant administration, from panelists administration, panel groups and panel samples. The sending process requires several settings which differ from normal mailings. Proceed as follows:

1. Open the mail form.
2. SMS messages can not be stored in mail templates. Therefore, usually the uploading of a mail template is not required.
3. In the field “Delivery”, select the type of delivery. The available options are:
  - E-mail
  - SMS
  - E-mail and SMS
4. Confirm with **Apply**. If you have selected “SMS” or “E-mail and SMS” as type of delivery, the section “SMS delivery” will be inserted. In this section, you enter the settings for SMS delivery.
5. Select the type. The available options are:
  - SMS
  - WAP-Push
  - SMS and WAP-Push
6. Enter the mobile phone number of the SMS sender. This is the number to which replies will be sent.
  - Until EFS 9.0, the rules for formatting mentioned in Chapter 2.1, p. 6. apply to the sender address as well.
  - From EFS 9.1, you may also use a non-numerical sender address, limited to eleven digits). Several customers asked for this functionality, assuming that returns might be considerably lower if only a numerical sender is used instead of the author’s name or the company name.
7. Enter the text of the SMS.
  - Do not use word wrap. Most mobile devices are not able to process word wraps in the text.
  - By clicking the **question mark** icon, you can access a list of the wildcards available.

Contact participant groups (Project "EFS SMS Extension")

[Back to list of participants](#)

Write e-mail

Number of mails: 1

Common settings

Mail template: --- Please select --- [Manage mail templates](#)

Method of delivery

Delivery: SMS

SMS delivery

SMS delivery: SMS

SMS sender:

Mail text (SMS):

Here you can get an overview of available wildcards and dynamic content replacements.

Delivery options

Set mail status to "Hold":

When to send (GMT) : 2009 - 05 - 26 09 : 17

Dispatch period for dynamic dispatch (Please specify in minutes.) :

Figure 2.1 SMS form

- Choose the appropriate delivery options and click **Preview mail**. Proceed as normal, while carefully observing hints and error messages.

## 2.4 Checking SMS Dispatch

You can check if the SMS have been sent:

- in the **Mail queue**: It lists all not-yet-completed mail processes of the respective project.
- in the **Participant administration->Mail transmission report** menu.
- in the **Platform cockpit** menu on the **Project mail overview** menu. With the necessary access rights, you can view all project-related mail proceedings of the installation centrally in this menu.



Please mind that EFS can only check if a dispatch has been triggered successfully. It can not be checked if the SMS have reached the recipients and if they were read.



# 3 Planning and Managing SMS Dispatch

## 3.1 Planning SMS Dispatch

Thorough planning of SMS dispatch and early ordering of the SMS packages required can guarantee a smooth process.

- To order the required amount of SMS, please get in touch with your QuestBack Sales contacts. They can also provide a current list of prices.
- As owner of an installation, you are responsible for all SMS dispatched from and billed on this installation.
- Estimate how many SMS you will need for a survey. Mind that depending of the length of the messages, several SMS might be required for sending one message.
- Check the size of your remaining SMS resources regularly (see Chapter 3.2, p. 9). Order a new package before your resources are used up completely.



To make sure that an important survey process is not interrupted, the SMS resources ordered can be exceeded by up to 2,000 SMS. These SMS will be billed as usual. If you have exceeded 2,000 SMS, dispatch will be interrupted and can only be activated again after ordering the required amount of additional SMS.

## 3.2 Managing the SMS Resources of an Installation

In the **Options->SMS overview** menu, you can see how many SMS are still available on your installation.

- In the “Assigned SMS packages” section, you can find the packages which you ordered from your contact at QuestBack Sales.
- In the “SMS amount” section, you can see how many SMS can still be sent.