

MessageSender Installation Guide

# Installing and Setting Up MessageSender

To enable the **Automatic Message Forwarding** feature in PhonePad 4, you need to install and run MessageSender on **one** computer on your network. If you have a Local Area Network (LAN), you would normally install MessageSender on a file server, although you can alternatively run it from a stock standard workstation. Keep in mind though that the computer needs to remain logged in.

### Installing MessageSender

Download MessageSender from the PhonePad Add Ons page: <u>http://www.cybercom-software.com/phonepadaddons</u>

- 1. Run MessageSenderSetup.exe.
- 2. The MessageSender setup wizard will start. Click **Next** to begin.

실 Setup - MessageSender	
1 4	Welcome to the MessageSender Setup Wizard
	This will install MessageSender Version 4.13 on your computer.
-	It is strongly recommended that you close all other applications you have running before continuing. This will help prevent any conflicts during the installation process.
	WARNING: This program is protected by copyright laws and International treaties.
	Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
0	Click Next to continue, or Cancel to exit Setup.
	Next > Cancel

3. The License Agreement screen will be displayed. Select I accept the agreement (unless you don't agree) and click Next.

Ę
*
re n file *
Cancel

4. Read the **Information** screen and then click **Next**.

Setup - MessageSender	
Information Please read the following important is	nformation before continuing.
When you are ready to continue with	h Setup, click Next.
Dependencies	
MessageSender requires Pho	onePad to function.
College College	
ercom posiwers	< Back Next > Cancel

5. Specify the directory you want to install MessageSender in, and then click **Next**.

🕁 Setup - MessageSender	
Select Destination Location Where should MessageSender be installed?	<b>R</b>
Setup will install MessageSender into the following fold	er.
To continue, click Next. If you would like to select a different fol	der, dick Browse.
G:\MessageSender	Browse
At least 4.7 MB of free disk space is required.	
Cybercon Software	
< Back	Next > Cancel

6. You will be prompted to enter a **Start Menu Folder**. You can either keep the default one or enter another one. Click **Next** to continue.

Setup - MessageSender	0
Select Start Menu Folder Where should Setup place the progr	ram's shortcuts?
Setup will create the progra	am's shortcuts in the following Start Menu folder.
To continue, click Next. If you would	d like to select a different folder, click Browse.
PhonePad 4	Browse
Don't create a Start Menu folder	
ercom blotiware	
	Cancel Next > Cancel

7. If you want a desktop icon then select **Create a desktop icon**. If you want a quick launch icon then select **Create a Quick Launch icon**.

🕹 Setup - MessageSender	
Select Additional Tasks Which additional tasks should be performed?	<b>R</b>
Select the additional tasks you would like Setup to perform while installing MessageSender, then click Next.	
Additional icons:	
Create a desktop icon	
Create a Quick Launch icon	
Cybercom Software -	
Back Next >	Cancel

8. You should now be ready to install MessageSender. Review the information to ensure it is correct and then click **Install**.

_	101210111201112	
Re	ady to Install	
	Setup is now ready to begin installing MessageSender on your computer.	K
	Click Install to continue with the installation, or click Back if you want to review or change any settings.	
	Destination location: G:\MessageSender	*
	Start Menu folder: PhonePad 4	
	Additional tasks: Additional icons: Create a desktop icon	
		-
		P
irc	om Software	
	c Bank Instal	Cancel
irc	om Software	Са

9. Once the installation has completed, click **Finish**.

🍓 Setup - MessageSender	
G	Completing the MessageSender Setup Wizard Setup has finished installing MessageSender on your computer. The application may be launched by selecting the installed icons. Click Finish to exit Setup.
	Finish

## Setting Up MessageSender

- 1. Run **MessageSender**.
- 2. You should be prompted for the location of the PhonePad data directory. Enter the name of the directory.

Location of Data		×
	Please select the location of the PhonePad database. Directory: C:\Program Files\PhonePad\Data	Cancel

- 3. Click **OK**.
- 4. Select **Settings** from the **Tools** menu.

### General Tab

5. The **General** tab of the **Settings** window will be displayed.

<u>G</u> eneral Messa	ge Sending SMTP Options	• • •	🖌 ОК
PhonePad Datab	ase		🗙 Cancel
Data Directory:	g:\phonepad\data	•••	🕐 <u>H</u> elp
Startup Options			
🔄 Run minimiz	ed 📝 Activate on startup		
📄 Run on star	tup 📄 Prompt on exit		
Date and Time Se	ettings		
Status Bar:	dddd d mmmm yyyy hhamass	*	
Sample:	Sunday 15 November 2009 14:13:50		
Message Log:	dd/mm/yyyy hh:mm:ss	*	
Sample:	15/11/2009 14:13:50		
Display Preference	8		
Default View:	Message List	*	

- 6. The **Data Directory** displayed should be the same as the one you entered earlier.
- 7. Select the **Run Minimized** checkbox if you want MessageSender to be minimized on startup.
- 8. Select the **Run on Startup** checkbox if you want MessageSender to automatically start whenever the computer it is installed on starts. This is highly recommended.
- 9. Select Activate on Startup if you want MessageSender to start checking for messages automatically when it starts. This is useful if you have Run on Startup also enabled because, if the computer MessageSender is installed on is rebooted, MessageSender will automatically start up and start forwarding messages without any intervention from you.
- 10. Select **Prompt on Exit** if you want to confirm the closure of MessageSender whenever you close the application.
- 11. **The Date and Time Settings** allow you to customize the appearance of dates and times in the **Message Log** and MessageSender's status bar.
- 12. The **Default View** option under **Display Preferences** allows you to specify which tab in the main window should be displayed when MessageSender starts, ie. **Message List** or **Message Log**.

Message Sending Tab

13. Click on the **Message Sending** tab.

Settings	8
General Message Sending SMTP Options	🗸 ОК
Message Checking	🗙 Cancel
Check every 5 束 minutes	🕐 <u>H</u> elp
V Show Progress	
Sending Options	
Send only relevant details	
Email Subject	
Use Custom Subject: Message from PhonePad.	
Use Field for Subject     Caller	
SMS Message Limit	
Maximum Message Size: 160 💠 characters	

- 14. **Message Checking** should automatically be checked and set to the default of 5 minutes. You can increase or decrease the number of minutes if you wish but generally 5 minutes is appropriate.
- 15. **Show Progress** displays a progress bar on the MessageSender main window.
- 16. When the **Send Only Relevant Details** checkbox is checked, any fields that are unchecked in phone messages won't be included.
- 17. Under **Email Subject**, you can specify the subject for emails that are sent by MessageSender.
  - a. If you have **Use Message Subject** checked, the phone or text message's subject will be used for the email subject.
  - b. You can select **Use Custom Subject** to override the message's subject and replace it with your own, eg. "Message from PhonePad".
  - c. An alternative is to select **Use Field for Subject** and select either the Caller, From or Subject field for the email subject.
- 18. Most SMS Gateways restrict the size of messages, which is generally 160 characters. The **Maximum Message Size** option allows you to specify the maximum message size and specified by the gateway you use. It is important that you set this correctly as many SMS Gateways will reject the message if it exceeds the maximum allowable size. If you find that messages are not getting through to the mobile/cell phones then it is highly likely your message size is set too high.

#### SMTP Options Tab

19. Under SMTP Sender Details, you can specify the Name and Email address for the sender of the forwarded messages. For instance, you could use "MessageSender" as the Name and "messagesender@xyzcorporation.com" as the Email address. However, you should be aware that some mail servers require that the Email address be the same as the SMTP Account Name.

Name: PhoneP	əd			0	Help
Email: phonepa	adtest@klahrglass.c	om	Ð		
SMTP Email Format					
Message Format:	None		~		
Encoding:	None		*		
Include the following           Include the following           Image: Comparison of the f	information: From Phone Details Action	<ul> <li>✓ Urgent</li> <li>✓ Subject</li> <li>✓ Message</li> <li>✓ Taken By</li> </ul>			
Also apply to text	messages				
Automatically res	tart MessageSender	after 2 \$ fa	ilures		

- 20. The **SMTP Email Format** options allow you to specify how messages should be formatted when sent to your mail server. Generally, **Message Encoding** should be set to **MIME** and **Content Transfer** should be set to **Base64**, however, you may have to play with these settings if you experience problems with your mail server not accepting the messages.
- 21. The SMTP Phone Message Options allows you to select the phone message information you want included in emails.
- 22. By selecting **Also Apply to Text Messages**, you can use the same settings for text messages (only fields that are applicable).
- 23. If you have problems with MessageSender "freezing" (usually due to slow or no response from your mail server, or it not releasing the connection) you can select **Automatically Restart MessageSender** to force MessageSender to shut itself down and restart automatically if this occurs. It also allows you to do this only after a specific number of failures.

#### Connection Tab

24. Click on the **Connection** tab.

Settings		8
Message Sending SMTF	Options Connection	🖌 ОК
Message Sending		X Cancel
MAPI		Help
SMTP		Teb
SMTP Server:	smtp.cybercom-software.com	
SMTP Port	25	
Account Name:	system@cybercom-software.com	
Password:	***************	
SMTP Server Authentication	on	
Secure Password Au	thentication (SPA)	
Logon to incoming (P	OP) mail server before sending	
PDP Server:		
Account Name:		
Password:		
V EHLO		
Use TLS O Automatic   Implic	it 💮 Explicit 💮 None	
🔽 TLS 1.0 📄 SSL 2	2.0 📄 SSL 3.0	
V Log activity V L	og SMTP Responses	

- 25. Select MAPI if you want MessageSender to use the Windows Simple Messaging API (MAPI) functions to send messages. MessageSender must have access to MAPI32.DLL on the machine it is running on. <u>Please note</u> that if you use Microsoft Outlook 2003 or later, you will probably get a message asking you to confirm sending any messages. In this case you will not be able to use MAPI.
- 26. If you want MessageSender to send messages via an SMTP server then check the **SMTP** radio button.

#### The following settings only apply to SMTP.

- 27. Specify the name of your **SMTP Server**.
- 28. Enter the Account Name MessageSender should use to login to the SMTP Server. Please note that some mail servers require that the Email setting under SMTP Sender Details under the Message Sending tab be the same address as the one specified in this setting.
- 29. Enter the **Password** for the SMTP Server account.
- 30. Under **SMTP Server Authentication**, you can select additional settings if your mail server requires it.
- 31. Check Secure Password Authentication if your mail server requires this.
- 32. Some mail servers require you to login to your POP account (incoming messages) before logging in to your SMTP account (outgoing messages). If your mail server requires this then check the **Login to incoming (POP) mail server before sending** option and enter your POP account details.

- 33. If you server requires the use of the **EHLO** protocol then select this option.
- 34. If you server uses TLS then select **Use TLS** and select the appropriate options. You may need to play with these settings to get them right. Here's a quick explanation of these settings:
  - a. **Use TLS 1.0** Configures MessageSender should use the TLS 1.0 security protocol. 0=Disabled, 1=Enabled.
  - b. **Use SSL 2.0** Configures MessageSender to use the SSL 2.0 security protocol. 0=Disabled, 1=Enabled.
  - c. **Use SSL 3.0** Configures MessageSender to use the SSL 3.0 security protocol. 0=Disabled, 1=Enabled.
  - d. Automatic The appropriate option will be automatically selected.
  - e. **Implicit** SSL negotiation will commence immediately after the connection is established.
  - f. **Explicit** MessageSender will first connect in plaintext and then explicity start SSL negotiation through a protocol command such as STARTTLS.
  - g. **None** No SLL negotiation or security. All communication will be in plaintext mode.
- 35. When **Log Activity** is checked, all actions performed by MessageSender will be displayed in the MessageSender log view on the main screen.
- 36. If you enable **Log SMTP Responses**, MessageSender will also log the information it gets back from your mail server. This can be useful in troubleshooting problems you may have with the mail server. Please note that this settings is only valid if the **Log Activity** setting is enabled.
- 37. Click **OK**.

That's it. MessageSender should now automatically forward messages via email (as long as users have this enabled in PhonePad).

Automatic Message Forwarding		8
This option allows you to automatically forward messages PhonePad, Email and SMS (the last two options require MessageSender to be installed on your network). Forward Via PhonePad Forward Via Email Forward Via SMS	via 🔽	OK Cancel <u>H</u> elp
<ul> <li>Automatically send messages to the following email addresses:</li> </ul>		
adam@cybercom-software.com	A	
Each address should be on a separate line.		