

Strata Master Rockend SMS Enhanced Integration

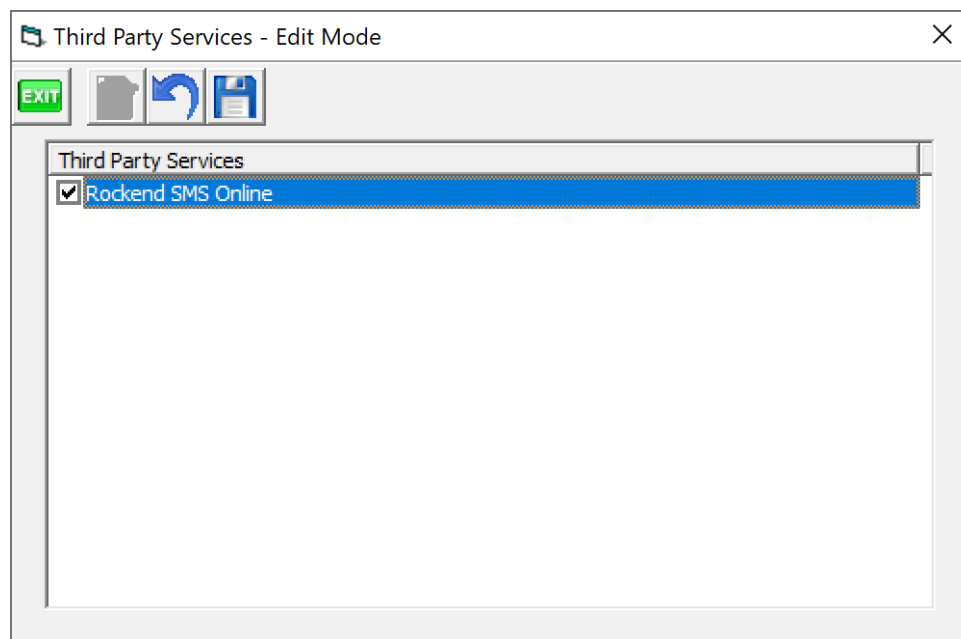
Configuration

To use Rockend SMS Enhanced SMS Integration, each Strata Master user must have the email address in their *User > General Details* area, registered with Edgility on your Rockend SMS account. To register users to your account, login to your Rockend SMS Online Portal at www.rockendsms.edgility.com.au or contact Edgility on +61 2 9518 5955 or support@edgility.com.au.



Rockend SMS Third Party Service Configuration

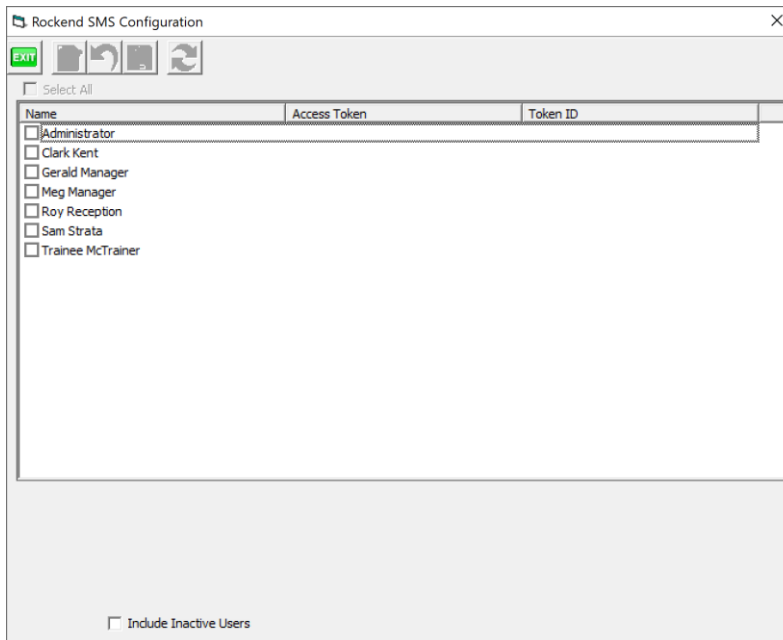
A new screen has been added in Strata Master Version 12, to allow individual users to be configured for Rockend SMS Enhanced Integration. All active Strata Master users will be listed on this configuration screen.

Rockend SMS Configuration must be completed by a user with an access level to *Write* to the database.



Activate Rockend SMS Enhanced Integration and configure users:


1. Navigate to *Configure > Third Party Services*
2. Enable **Edit Mode** by selecting  button and check the box labelled *Rockend SMS Online*
3. Save activation by selecting  button
4. Double click on *Rockend SMS Online* from the list to start configuration
5. A list of Strata Master users will appear in the *Rockend SMS Configuration* screen

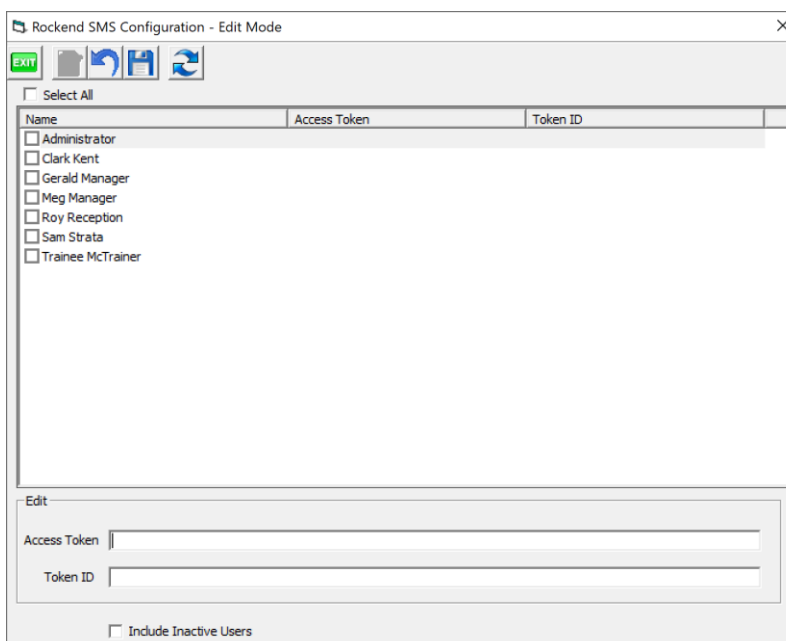


The screenshot shows the 'Rockend SMS Configuration' window. It has a title bar with a close button. Below the title bar is a toolbar with an 'EXIT' button and three icons: a folder, a refresh, and a save. A checkbox labeled 'Select All' is present. The main area contains a table with three columns: 'Name', 'Access Token', and 'Token ID'. The 'Name' column lists several users with checkboxes next to them: Administrator, Clark Kent, Gerald Manager, Meg Manager, Roy Reception, Sam Strata, and Trainee McTrainer. At the bottom, there is a checkbox labeled 'Include Inactive Users'.

Name	Access Token	Token ID
<input type="checkbox"/> Administrator		
<input type="checkbox"/> Clark Kent		
<input type="checkbox"/> Gerald Manager		
<input type="checkbox"/> Meg Manager		
<input type="checkbox"/> Roy Reception		
<input type="checkbox"/> Sam Strata		
<input type="checkbox"/> Trainee McTrainer		

☐ Include Inactive Users

6. Select yourself from the list to reveal Access Token and Token ID area at the bottom of the screen -
enable **Edit Mode** by selecting  button to populate these details.



The screenshot shows the 'Rockend SMS Configuration - Edit Mode' window. It has a title bar with a close button. Below the title bar is a toolbar with an 'EXIT' button and three icons: a folder, a refresh, and a save. A checkbox labeled 'Select All' is present. The main area contains a table with three columns: 'Name', 'Access Token', and 'Token ID'. The 'Name' column lists several users with checkboxes next to them: Administrator, Clark Kent, Gerald Manager, Meg Manager, Roy Reception, Sam Strata, and Trainee McTrainer. At the bottom, there is a section labeled 'Edit' with two input fields: 'Access Token' and 'Token ID'. At the very bottom, there is a checkbox labeled 'Include Inactive Users'.

Name	Access Token	Token ID
<input type="checkbox"/> Administrator		
<input type="checkbox"/> Clark Kent		
<input type="checkbox"/> Gerald Manager		
<input type="checkbox"/> Meg Manager		
<input type="checkbox"/> Roy Reception		
<input type="checkbox"/> Sam Strata		
<input type="checkbox"/> Trainee McTrainer		

Edit




Access Token

Token ID

☐ Include Inactive Users


7. Copy and paste your Access Token and Token ID provided to you in your Rockend SMS Welcome email, into the corresponding fields.

NOTE: To resend your Rockend SMS Welcome email, head to www.rockendsms.edgility.com.au and click login. Use the “Lost Password” link to have your details resent via email.

8. Save settings by selecting  button
9. To complete setup for other users, select yourself from the list and enable **Edit Mode** by selecting the  button.
10. Import all user setting by selecting  button

Access Token and Token ID details for each user with an email address registered with Rockend SMS, will populate automatically during synchronisation.

NOTE: If user details do not populate, ensure user email addresses are correctly registered in their Strata Master user profile and have been registered for Rockend SMS with Edgility - support@edgility.com.au.

11. Once prompted that synchronisation is complete, select  to save the configuration

When User Configuration and Rockend SMS Third Party Configuration are completed successfully, registered users will be ready to use Rockend SMS Enhanced Integration.

NOTE: If you disable Rockend SMS Third Party Configuration, you will need to configure your SMS integration again starting from step 1 of the above instructions.

Sending SMS from Strata Master

When sending SMS messages to a contact, the new Rockend SMS browser screen will load for all Strata Master users configured for Rockend SMS Enhanced integration.

SMS messages can be sent from the following contact screens in Strata Master:

- Owner
- Original Owner
- Tenant
- Agent
- Notice Contact
- Levy Contact
- Creditor (Work order screen & Creditor contact screen)

Strata Master 12.0 -- User: Administrator

File View Manage Accounting Reports Wizards Configure Utility Window Help ClientID: DEMO

Exit Receipt Levy Claim Cr Invoice Pay Quick Pay Corp Budget Owner Quick Rpt Form Rpts Diary WorkOrder Messages Registers Reminders SMS File Smart Activity Help

SMS

Select Creditors to send SMS

Rockend SMS

Strata Master Account Admin (stratamaster@rockendsms.com.au)

Messaging

Select a contact from below to view recent message history

1 Contact selected

Use Template (Optional)

Allow Replies * OFF

Sender ID * Rockend

SMS Message *

0 of 160 Characters 1 Message Parts

Save as Template Clear Message

Please be aware that some messages with long merged data fields may result in multiple parts.

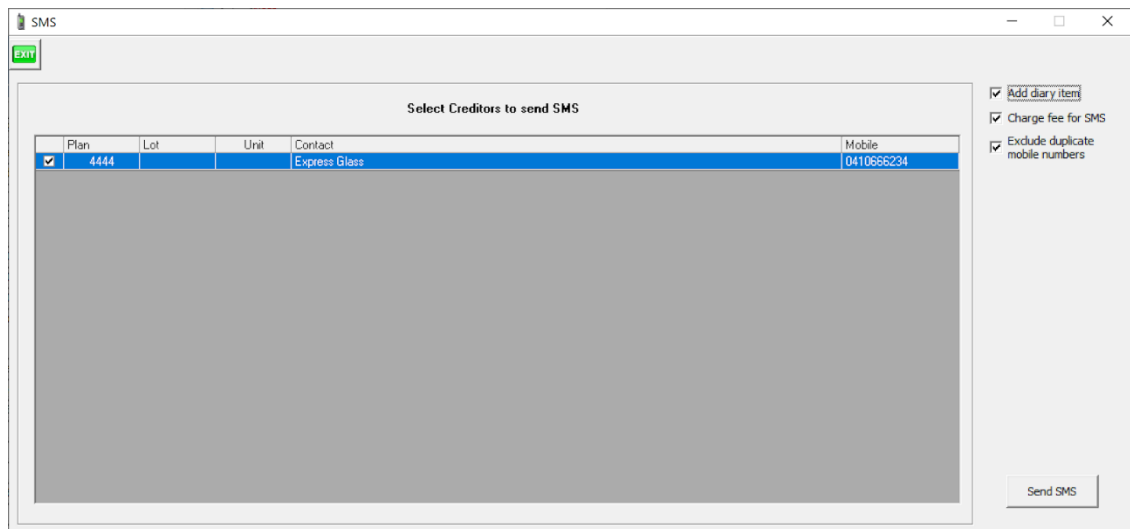
Select one or more merge fields below

Property Details

PlanNo BodyCorpName OwnersCorpAddress OwnersCorpAddressLine1

To send SMS from a Contact Screen:

1. Select the mobile phone icon (to the right of the email icon) on the contact card.
2. A preview screen will load displaying the contacts, including any additional contacts associated with the primary contact.



Add diary item will be selected by default, and when selected the message is recorded in the Owners Corporation diary as a closed entry.

Exclude duplicate mobile numbers will be selected by default.

The *Charge fee for SMS* selection is dependent upon your configuration in Configure > Agency > Management Fees.

NOTE: Contacts with no mobile phone number or an invalid mobile phone number will be displayed in red.

3. Review the contacts selected then click *Send SMS*.
4. The Rockend SMS message browser will load.
5. In order to view message history for selected contact(s), click to expand the "Contacts Selected" toggle and click on a recipient number. The "History" window will appear on the right, with recent SMS communication to this contact. Select the *Show Team Communication* box to display previous contact by all Strata Master users.

NOTE: Contacts who previously opted out of receiving SMS notifications will display in red text and will not receive the message.

6. Set *Allow Replies* to ON if you want to allow the contact to reply to the SMS message. Replies can be sent to your email and are logged in your Web Inbox (accessed via Rockend SMS Online), or to your verified mobile number.

Set *Allow Replies* to OFF to send your message from a verified *Sender ID* ie. your office name.

NOTE: Sender ID's are limited to 11 characters and must exclude spaces and symbols. Select *New Sender ID* in the *Sender ID* dropdown list to create and verify a new one.

7. Type a message in the SMS Message text box or select a template from the template list. If a template is selected, the Sender ID and text can be modified before the SMS message is sent. To include merge fields in the SMS message, select the required fields from the available merge fields. A space will automatically be added after each merge field
8. When the message is ready to be sent, scroll down to select *Send SMS* to send now or select *Schedule Options* to send at a later date/time. The confirmation screen will load.
9. Select the checkbox for *I agree to the above*. It is highly recommended that all Rockend SMS users read the *2003 Spam Act* and *Consent, Identification and Unsubscribe* notes on this screen when using Rockend SMS Enhanced Integration for the first time.

10. Select the *Send Message* button. A confirmation message will display, and applicable diary entries and charges will be updated.

Bulk SMS Messages – Communications Wizard

When sending SMS messages to multiple contacts from the Communications Wizard, the new Rockend SMS browser screen will load for all Strata Master users configured for Rockend SMS Enhanced Integration.

The Communications Wizard allows you to Bulk SMS to individual owners corporations or multiple owners corporations. For multiple owners corporations you are able to filter by managers, and plan numbers.

The contact groups available to send a Bulk SMS to are:

- Owners
- Tenants
- Agents
- Residents
- Committee
- Notice Contacts
- Levy Contacts

To send a Bulk SMS in Strata Master:

1. Select the *Messages* icon from the Strata Master toolbar.
2. Select the *Bulk SMS* option.
3. Select either *Individual Owners Corporation* or *Multiple Owners Corporations* > *Next*.
4. Select the group you wish to receive bulk SMS > *Next*.
5. A preview screen will display with all the selected contacts, including any additional contacts associated with the primary contact.

Communications Wizard

☒ Add diary item
 ☒ Charge fee for SMS
 ☒ Exclude duplicate mobile numbers
 ☒ Select All

Plan #	Unit #	Lot #	Contact	Mobile	Select
2222	1	1	Mr & Mrs John Lennon & Yoko Ono		<input type="checkbox"/>
2222	2	2	Mr Paul McCartney	0421225554	<input type="checkbox"/>
2222	3	3	Mr George Harrison		<input type="checkbox"/>
2222	4	4	Mr Ringo Starr	0401153811	<input checked="" type="checkbox"/>
3333	1	1	Mr Jeremy Bullfrog	0401153811	<input checked="" type="checkbox"/>
3333	1	1	Mr Jeremy Bullfrog - Additional contacts	0401153811	<input checked="" type="checkbox"/>
3333	1	1	Mr Jeremy Bullfrog - Additional contacts	0418514376	<input checked="" type="checkbox"/>
3333	2	2	Mr Peter Rabbit		<input checked="" type="checkbox"/>
4444	1	1	Mr Rosemary Brown		<input checked="" type="checkbox"/>
4444	2	2	Mr Andrew Stewart	0400111222	<input checked="" type="checkbox"/>
4444	3	3	Mrs Janelle Lingini	0411555444	<input checked="" type="checkbox"/>
4444	4	4	Ms Mary Jones	0428111222	<input checked="" type="checkbox"/>
4444	5	5	Ms Rae Lasagna	0456222666	<input checked="" type="checkbox"/>
4444	6	6	Boccardo & Company Pty Ltd	0400000111	<input checked="" type="checkbox"/>
4444	7	7	Mr David Caneloni	0414336666	<input checked="" type="checkbox"/>
4444	8	8	Mr & Mrs David & Robyn Taglatelli	0404955978	<input checked="" type="checkbox"/>
4444	9	9	Mr David Caneloni	0414336666	<input checked="" type="checkbox"/>
4444	10	10	Mr John Fitzgerald	0411222333	<input checked="" type="checkbox"/>
5555	1	1	Mr Steve McManus		<input type="checkbox"/>
5555	2	2	Mrs Jane Turner		<input type="checkbox"/>
5555	3	3	Miss Gina RILEY		<input type="checkbox"/>
5555	4	4	Mr Russell Crowe		<input type="checkbox"/>
5555	5	5	Ms Naomi Watts	0421334579	<input checked="" type="checkbox"/>
5555	6	6	Mrs Nicole Kidman		<input type="checkbox"/>
5555	7	7	Mr Eric Bana		<input type="checkbox"/>
5555	8	8	Dame Edna Everage		<input type="checkbox"/>
5555	9	9	Mr Jack Thompson		<input type="checkbox"/>
5555	10	10	Mr Glenn Robbins	0402384939	<input checked="" type="checkbox"/>

23 contacts have been selected

Close < Back Next > Finish

Add diary item will be selected by default, when selected the message is recorded in the Owners Corporation diary as a closed entry.

Exclude duplicate mobile numbers will be selected by default.

The *Charge fee for SMS* selection is dependent upon your configuration in Configure > Agency > Management Fees.

The total number of contacts that have been selected is displayed in the bottom right hand corner below the preview screen.

NOTE: Contacts with no mobile phone number or an invalid mobile phone number will be displayed in red.

- Review the list of contacts > *Finish*.
- The Rockend SMS Bulk Message screen will load.

8. In order to view message history for selected contact(s), click to expand the “Contacts Selected” toggle and click on a recipient number. The “History” window will appear on the right with recent SMS communication to this contact. Select the *Show Team Communication* box to display previous contact by all Strata Master users.

NOTE: Contacts who previously opted out of receiving SMS notifications will display in red text and will not receive the message.

9. Set *Allow Replies* to ON if you want to allow the contact to reply to the SMS message. Replies can be sent to your email and are logged in your Web Inbox (accessed via Rockend SMS Online), or to your verified mobile number.

Set *Allow Replies* to OFF to send your message from a verified *Sender ID* ie. your office name.

NOTE: Sender ID's are limited to 11 characters and must exclude spaces and symbols. Select *New Sender ID* in the *Sender ID* dropdown list to create and verify a new one.

10. Type a message in the SMS Message text box or select a template from the template list. If a template is selected, the Sender ID and text can be modified before the SMS message is sent. To include merge fields in the SMS message, select the required fields from the available merge fields. A space will automatically be added after each merge field.

11. When the message is ready to be sent, scroll down to select *Send SMS* to send now or select *Schedule Options* to send at a later date/time. The confirmation screen will load.
12. Select the checkbox for *I agree to the above*. It is highly recommended that all Rockend SMS users read the *2003 Spam Act* and *Consent, Identification and Unsubscribe* notes on this screen when using Rockend SMS Enhanced Integration for the first time.
13. Select the *Send Message* button. A confirmation message will display, and applicable diary entries and charges will be updated.

Bulk SMS Messages – Debt Recovery

SMS messages can be configured to be sent to owners to advise them of the debt recovery notices at the time they are distributed via email or post.

You can configure a SMS message to be sent for each stage of Debt Recovery.

To configure:

1. Navigate to *Configure > Debt Recovery*.
2. Select the *Edit* button.
3. Select the *Send SMS when issuing debt recovery notice* option for each stage of Debt Recovery where you would like an SMS message to be sent.
4. Save your changes.

To send a SMS when running Debt Recovery:

1. Navigate to the *Levy Wizard > Debt Recovery*.
2. Select the stage of Debt Recovery.
3. The SMS option will be selected by default.
4. After the Debt Recovery notices have been sent, a preview screen will display with all the contacts for that stage of Debt Recovery, including any additional contacts associated with the primary contact.

NOTE: Contacts with no mobile phone number or an invalid mobile phone number will be displayed in red.

5. *Add diary item* will be selected by default, when selected the message is recorded in the Owners Corporation diary as a closed entry.
6. The *Charge fee for SMS* selection is dependent upon your configuration in *Configure > Agency > Management Fees*.

7. The total number of contacts that have been selected is displayed in the bottom right hand corner below the preview screen.
8. Review the list of contacts > *Next*.
9. The Rockend SMS Bulk Message screen will load.
10. The predefined Debt Recovery template for that stage of Debt Recovery will be pre-loaded within Rockend SMS Online.

Debt Recovery Templates

The following predefined Debt Recovery templates have been preloaded into Rockend SMS Online for you.

- Manual Debt Recovery
- Stage 1 Debt Recovery
- Stage 2 Debt Recovery
- Stage 3 Debt Recovery

Only Rockend SMS users with *Administrator* permissions can create/edit the above Debt Recovery templates in the Rockend SMS Online Platform. You can do this by heading to www.rockendsms.edgility.com.au or by opening a SMS sending screen in Strata Master, scrolling to the bottom and clicking on the Login to *Rockend SMS* button.

Once logged in, navigate to *SMS > Templates* using the left side menu. A list of current templates will be listed. Select a template name to open, view or edit the existing list or click Create Rockend SMS Template button to create a new one.

Merge fields will appear in toggle categories at the bottom of the screen - click any merge button to insert the merge field into your message.

When a template is selected during the sending process, the Sender ID and message text can be changed before sending the message.

Bulk SMS Messages – Meeting Wizard

Meeting reminders can be sent via SMS to all, or un-financial lot owners via the Meeting Wizard.

Issue a reminder to un-financial lot owners:

To send a meeting reminder via SMS to un-financial lot owners:

1. Select the SMS button from the 'Issue a reminder to un-financial lot owners' option on the Meeting Wizard checklist.
2. A preview screen will display with all owners that are un-financial based upon the arrears-cut off date, including any additional contacts associated with the primary contact.
3. Contacts with no mobile phone number or an invalid mobile phone number will be displayed in red.
4. *Add diary item* will be selected by default, when selected the message is recorded in the Owners Corporation diary as a closed entry.
5. The *Charge fee for SMS* selection is dependent upon your configuration in Configure > Agency > Management Fees.
6. Review the list of contacts > *Send SMS*.
7. The Rockend SMS Bulk Message screen will load.
8. The Meeting Wizard Unfinancial Lots Template will be pre-loaded within Rockend SMS Online (To edit this template a Rockend SMS user security level of Administrator is required).

Issue a reminder to all owners:

To send a meeting reminder via SMS to all owners:

1. Select the SMS button from the 'Send a meeting reminder to owners' option on the Meeting Wizard checklist.
2. A preview screen will display with all owners that are un-financial based upon the arrears-cut off date, including any additional contacts associated with the primary contact.
3. Contacts with no mobile phone number or an invalid mobile phone number will be displayed in red.
4. *Add diary item* will be selected by default, when selected the message is recorded in the Owners Corporation diary as a closed entry.
5. The *Charge fee for SMS* selection is dependent upon your configuration in Configure > Agency > Management Fees.
6. Review the list of contacts > *Send SMS*.
7. The Rockend SMS Bulk Message screen will load.

8. The Meeting Wizard Reminder Template will be pre-loaded within Rockend SMS Online (To edit this template a Rockend SMS user security level of Administrator is required).

Rockend SMS Sending Options

Message Templates

To create additional templates or edit existing one, you will need to login to your Rockend SMS Online Platform. You can do this by heading to www.rockendsms.edgility.com.au or by opening a SMS sending screen in Strata Master, scrolling to the bottom and clicking on the Login to *Rockend SMS* button.

Once logged in, navigate to *SMS > Templates* using the left side menu. A list of current templates will be listed. Select a template name to open, view or edit the existing list or click Create Rockend SMS Template button to create a new one.

Merge fields will appear in toggle categories at the bottom of the screen - click any merge button to insert the merge field into your message.

Only Rockend SMS users with Administrator permissions can create/edit global templates that are accessible to all users on the account. Rockend SMS users with *Standard* permissions can create/edit personal templates that are only visible to them.

When a template is selected during the sending process, the Sender ID and message text can be changed before sending the message.

NOTE: An SMS message can include up to 160 characters. If more than 160 characters are used per message, the character count and message parts will be updated as the message is being typed. Messages with multiple parts will be delivered to the recipient's handset as a single message on most modern devices. SMS messages are charged per part. Please be aware that messages with merge fields can result in multiple part messages depending on the merged data.

Schedule Options

Messages can be scheduled to be sent as a *Once Off* message at a later date/time or on a regular repeat basis. Scheduled messages will continue to be delivered until the schedule is cancelled via Rockend SMS Online.

NOTE: When messages are scheduled to be sent at a later stage, a record of the message will not be saved to Strata Master but can be accessed via the Reporting option in Rockend SMS Online.

Opt-Outs

With the introduction of Rockend SMS Enhanced Integration, your contacts will have the ability to opt out of receiving further SMS notifications from your office, in compliance with legislation. To do this automatically, simply add "reply STOP to optout" at the end of your message - messages must be sent using the *Allow Replies* set to ON to enable this feature. The Opt Out list will be updated automatically, if any recipient replies STOP. Rockend SMS will automatically exclude the recipients number from further SMS communication.

The Opt-Out list can be managed in Rockend SMS Online and can also be updated manually. You can do this by heading to www.rockendsms.edgility.com.au and clicking or by opening a SMS sending screen in Strata Master, scrolling to the bottom and clicking on the Login to *Rockend SMS* button.

Once logged in, navigate to *SMS > Opt Outs* using the left side menu.

NOTE: you are required by law to include an opt-out option for all advertising and marketing communications. Operational notifications do not require this.

General Notes

1. Diary entries will be created when the *Save to diary* option is selected for Single SMS messages except for messages sent from the Creditor Contact screen, as these messages are not linked to an owners corporation.
2. Charges will be applied when the *Charge fee for SMS* option is selected for Single SMS message, except for messages sent from the Creditor Contact screen, as these messages are not linked to an owners corporation
3. An SMS message can include up to 160 characters. If more than 160 characters are used per message, the character count and message parts will be updated as the message is being typed. Messages with multiple parts will be delivered to the recipient's handset as a single message on most modern devices. SMS messages are charged per part.