



(formerly known as DWMA)

ECHO

Credit Control Management

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1.0 Introduction

SMS Accounting module aims to help user manage their SMS credit. In this module, you can do the followings:

1. Configure the alert to be sent out when your SMS credit balance is low.
2. View your top up history.
3. View your SMS usage.



Figure 1: SMS Accounting - Main Page

2.0 SMS Alert

This function allows user to configure the email notification when the SMS credit balance is low.

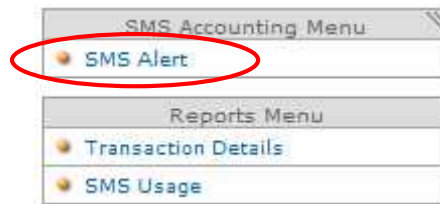


Figure 2.0.1: SMS Accounting - Side Menu

1. Click on 'SMS Accounting'.
2. Click on 'SMS Alert'. The configuration page will be displayed as shown in Figure 2.0.2.

A screenshot of the 'Admin Panel' for 'SMS Accounting Menu - SMS Alert'. The panel contains several configuration fields: 'Free SMS' (100), 'Billing Cycle' (1), 'Low Limit' (10), 'E-mail' (hr@yourorg.com, admin@yourorg.com), and 'Forward E-mail' (accounts@yourorg.com). Below these fields is a table for 'SMS Rate' with columns 'Quantity' and 'Rate / SMS'. The table shows two rows: one for quantity '< 2' with rate '0.10', and another for '> 3' with rate '0.05'. Below the table are two summary rows: 'Balance (Free)' with value '100' and 'Balance (RM)' with value '1.45'. At the bottom, there is a section for 'Available Packages' showing '0 of 0' items, a search bar with '100' entered, and a table with columns: 'No.', 'Package', 'SMS Rate', 'Expiry Date', 'Balance (SMS)', and 'Balance (RM)'. A 'Save' button is located at the bottom left.

Figure 2.0.2: SMS Accounting Menu – SMS Alert

3. 'Free SMS' refers to the number of SMS given to your organization by eHomemakers.
4. 'Billing Cycle' refers to the date of each month where the free SMS is reset.
5. 'Low Limit' refers to the remaining balance of SMS to trigger off the email notification. For example, if it is configured as '50', it means the system will send out the email notification when you are left with 50 SMS in the system.
6. 'E-mail' refers to the recipients who will be receiving the low limit notification and payment receipt. For multiple email addresses, separate each email address with a comma.
7. 'Forward E-mail' refers to the recipients who will be receiving the low limit notification only. For

multiple email addresses, separate each email address with a comma.

8. 'Balance (Free)' refers to the number of free SMS your organization has.
9. 'Balance (RM)' refers to the unused credit your organization has topped up.
10. Click 'Save' to save the configurations if you have made any changes.

3.0 Reports Menu

3.1 Transaction Details

1. Click on 'SMS Accounting'.
2. Click on 'Transaction Details'. The transaction details report will be displayed as shown in Figure 3.1.2.



Figure 3.1.1: SMS Accounting - Side Menu

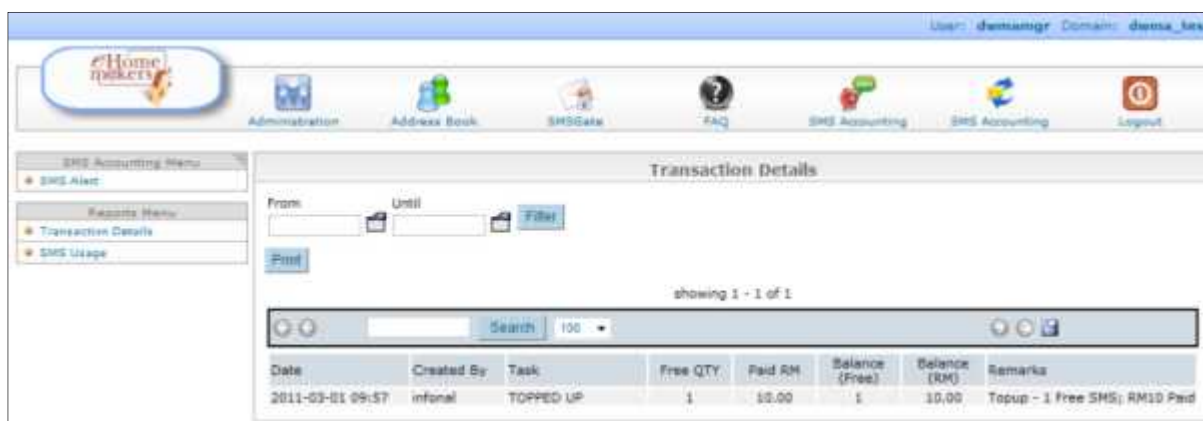


Figure 3.1.2 Reports Menu - Transaction Details

3. The Transaction Details Report shows SMS transactions including the amount topped up and the number of SMS used.
4. Click on the icon to choose date range ('From' and 'Until') and click 'Filter' to filter the list by date.
5. Description of each column in the report as explained below:
 1. Date – The date where the transaction took place
 2. Created By – The user who carried out the task
 3. Task – The task that was being carried out
 4. Free QTY – This column refers to different scenario based on the task carried. Refer to the table below:

Task	Free QTY
Topped up	The total number of free SMS given to your organization on that particular date.
Sent	The total number of free SMS used by your organization on that particular date.
Reset	The free SMS given by eHomemakers will be reset to the agreed number on the 1 st of each month.
Resume	The free SMS added back to your account if the system fails to send out the SMS task created.

5. Paid RM – The amount paid for top up
6. Balance (Free) – The number of free SMS left
7. Balance (RM) – The topped up amount unused
8. Remarks – Extra information about the transaction

3.2 SMS Usage

1. Click on 'SMS Accounting'.
2. Click on 'SMS Usage'. The SMS usage report will be displayed as shown in Figure 3.2.2.

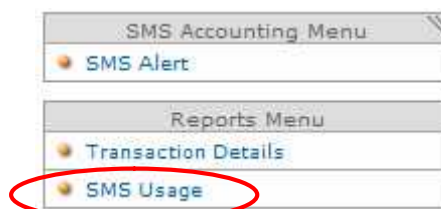


Figure 3.2.1: SMS Accounting - Side Menu

Date	Created By	Task	Title	Type	Free QTY	SMS Rate (RM)	Paid RM	Balance (Free)	Balance (RM)
2014-11-04 15:56	sysadmin	SMS SENT	Test no quantity	SMS	0	0.10 x 1	-0.10	0	0.25
2014-11-04 15:02	dwmamgr	SMS SENT	Test paid SMS	SMS	0	0.10 x 1	-0.10	0	0.35
2014-11-04 15:01	dwmamgr	TOPPED UP			-100		0.00	0	0.45
2014-11-01 08:00	System	MONTHLY RESET			90		0.00	100	0.45
Summary									
Total Free SMS Resumed: -10									
Total Paid RM Resumed: 0.00									
Total Free SMS Used: 0									
Total Paid RM Used: 0.20									

Figure 3.2.2: Reports Menu – SMS Usage

3. The SMS Usage Report shows the number of SMS used and SMS remained in the system.
4. Click on the icon to choose date range ('From' and 'Until') and click 'Filter' to filter the list by date.
5. Description of each column in the report as explained below:
 - a) Date – The date where the SMS was sent
 - b) Created By – The user who sent the SMS
 - c) Task – The task that was being carried out
 - d) Title – The title of the task that was being carried out
 - e) Type – The type of the transaction: SMS or MMS
 - f) Free QTY – This column refers to different scenario based on the task carried. Refer to the table below:

Task	Free QTY
Topped up	The total number of free SMS given to your organization on that particular date.
Sent	The total number of free SMS used by your organization on that particular date.
Reset	The free SMS given by eHomemakers will be reset to the agreed number on the 1 st of each month.

Resume	The free SMS added back to your account if the system fails to send out the SMS task created.
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- g) SMS Rate (RM) – The rate of the SMS
- h) Paid RM – The amount used to send out the task
- i) Balance (Free) – The number of free SMS left
- j) Balance (RM) – The topped up amount unused

3.3 Number of Items Displayed in Report

- Click on the drop down box to change the number of records displayed per page (refer to Figure 3.3.1).

Date	Created By	Task	Title	Type	Free QTY	SMS Rate (RM)	Paid RM	Balance (Free)	Balance (RM)
2014-11-04 15:56	sysadmin	SMS SENT	Test no quantity	SMS	0	0.10 x 1	-0.10	0	0.25
2014-11-04 15:02	dwmamgr	SMS SENT	Test paid SMS	SMS	0	0.10 x 1	-0.10	0	0.35
2014-11-04 15:01	dwmamgr	TOPPED UP			-100		0.00	0	0.45
2014-11-01 08:00	System	MONTHLY RESET			90		0.00	100	0.45
Summary									
Total Free SMS:									
Resumed:									
Total Paid RM:									
Resumed:									
Total Free SMS:									
Used:									
Total Paid RM:									
Used:									

Figure 3.3.1

3.4 Navigation - Report

- Click  to go to the next page.
- Click  to go to the previous page.
- Click  to go to the last page.

- d) Click  to go to the first page.

3.5 Download Report

- Select the type of report.
- Click 'Download' to download the selected report to a CSV file that can be opened with Microsoft Excel.
- A file download window will be displayed as shown in Figure 3.5.1.

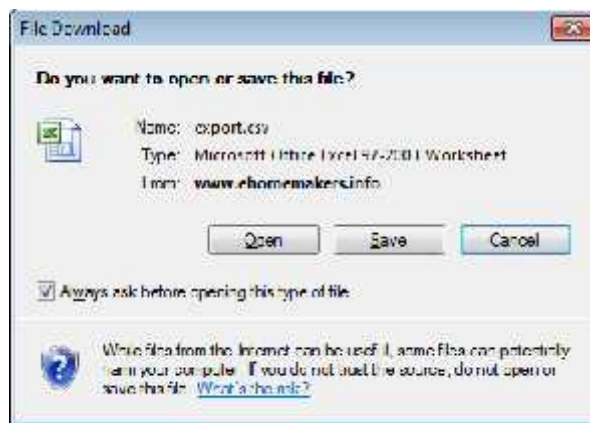
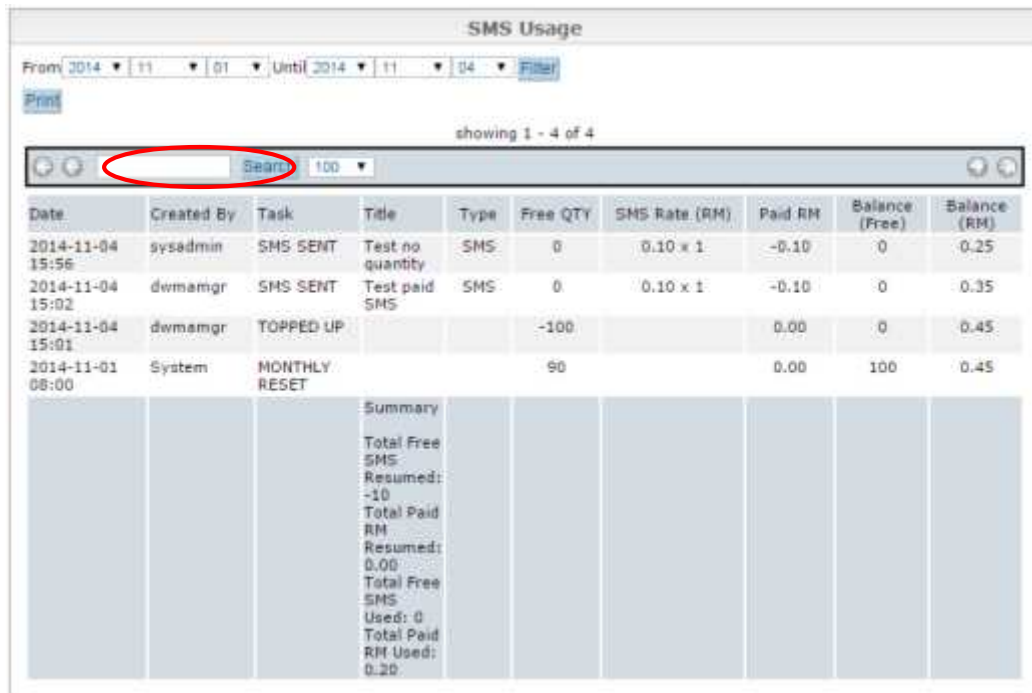


Figure 3.5.1

- Click 'Open' to open the report in Microsoft Excel or click 'Save' to save the report to your local PC or click 'Cancel' to cancel the download.
- To open the downloaded file in Microsoft Excel, refer to **User Manual – How To View The Exported File (CSV File)**.

3.6 Search in Report

- Type the searched text in the search text box (refer to Figure 3.6.1).



SMS Usage

From 2014-11-01 Until 2014-11-04 Filter

Print

showing 1 - 4 of 4

Search: 100

Date	Created By	Task	Title	Type	Free QTY	SMS Rate (RM)	Paid RM	Balance (Free)	Balance (RM)
2014-11-04 15:56	sysadmin	SMS SENT	Test no quantity	SMS	0	0.10 x 1	-0.10	0	0.25
2014-11-04 15:02	dwmamgr	SMS SENT	Test paid SMS	SMS	0	0.10 x 1	-0.10	0	0.35
2014-11-04 15:01	dwmamgr	TOPPED UP			-100		0.00	0	0.45
2014-11-01 08:00	System	MONTHLY RESET			90		0.00	100	0.45
			Summary						
			Total Free SMS						
			Resumed: -10						
			Total Paid RM						
			Resumed: 0.00						
			Total Free SMS						
			Used: 0						
			Total Paid RM						
			Used: 0.20						

Figure 3.6.1

2. Click 'Search'.
3. The system will return the matching results.

3.7 Print Report

1. Click 'Print' button as shown in Figure 3.7.1.
2. A print dialog box will be displayed.
3. Select your printing options and click 'Print'.

SMS Usage

From 2014 11 01 Until 2014 11 04 Filter

Print

showing 1 - 4 of 4

Search 100

Date	Created By	Task	Title	Type	Free QTY	SMS Rate (RM)	Paid RM	Balance (Free)	Balance (RM)
2014-11-04 15:56	sysadmin	SMS SENT	Test no quantity	SMS	0	0.10 x 1	-0.10	0	0.25
2014-11-04 15:02	dwmamgr	SMS SENT	Test paid SMS	SMS	0	0.10 x 1	-0.10	0	0.35
2014-11-04 15:01	dwmamgr	TOPPED UP			-100		0.00	0	0.45
2014-11-01 08:00	System	MONTHLY RESET			90		0.00	100	0.45
			Summary						
			Total Free SMS:						
			Resumed: -10						
			Total Paid RM						
			Resumed: 0.00						
			Total Free SMS						
			Used: 0						
			Total Paid RM Used:						
			0.20						

Figure 3.7.1