

DAYLITEMESSAGES FOR DAYLITE

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General

DayliteMessages for Daylite

About DayliteMessages

DayliteMessages provides you with the ability to send SMS text messages to one or multiple Daylite contacts. Create messages templates and use merge keys to fill your message with dynamic Daylite content like salutation or the contact's name.

Features

DayliteMessages provides the following functions:

- Send SMS text messages to one or multiple Daylite contacts
- Manage message templates
- Use merge keys to retrieve dynamic content from Daylite

System Requirements

Operating System: OS X 10.8 or newer

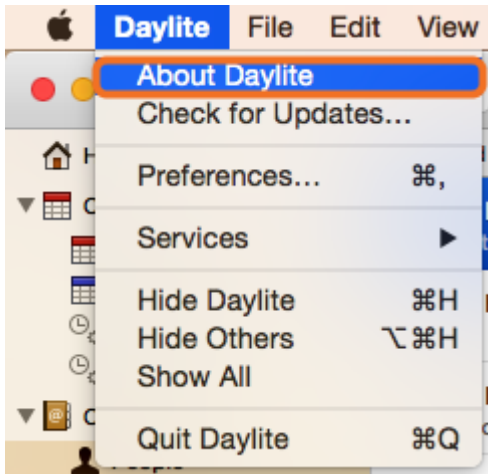
In order to use Apple Messages as service to send text messages, you need OS X 10.10

Daylite Version: 4.3 or newer

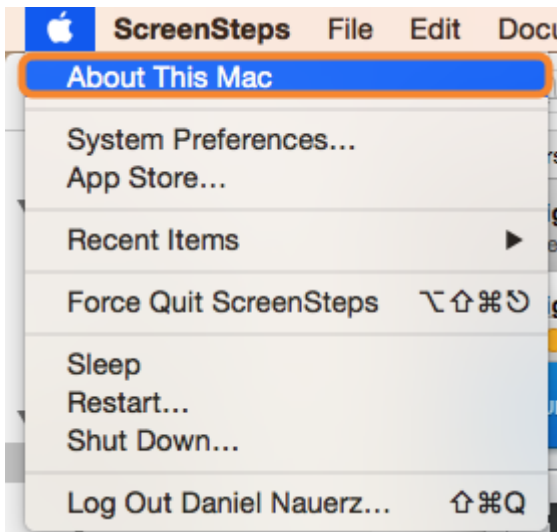
Setup

Installation

1. To check your Daylite version, go to the Daylite menu and select 'About Daylite'. DayliteMessages requires at least Daylite 4.3.



2. To check your OS X version, go to the Apple menu and select 'About this Mac'. DayliteMessages requires at least OS X 10.8.

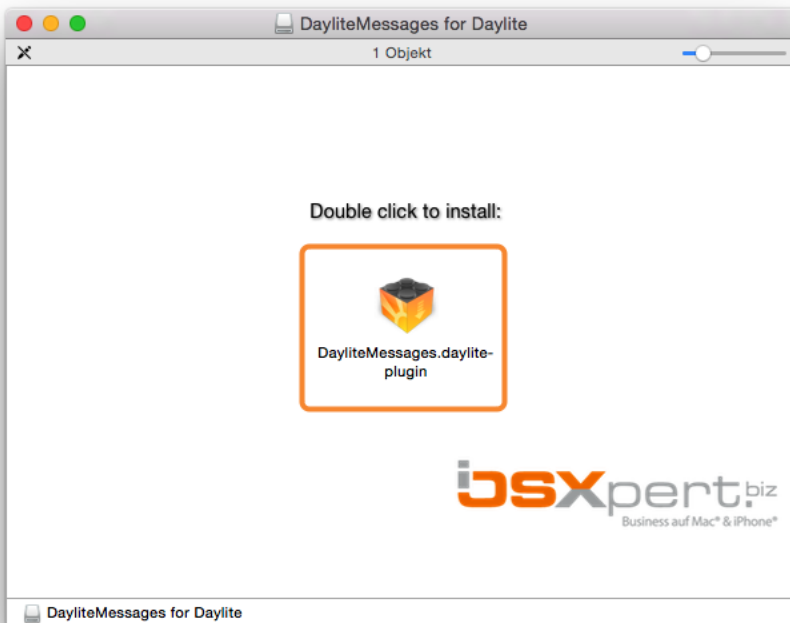


3. Double-click 'DayliteMessages_for_Daylite.dmg'.

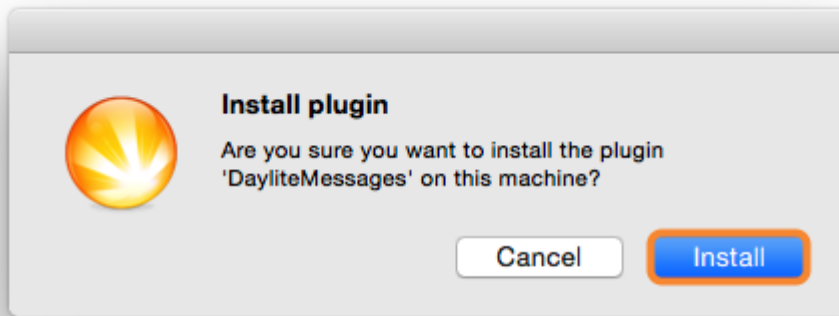


DayliteMessages for Daylite.dmg

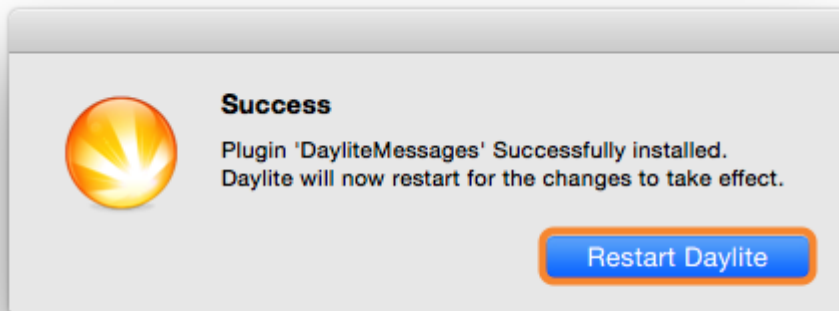
4. Double-click 'DayliteMessages.daylite-plugin'.



5. Click install



6. To finalize the installation click 'Restart Daylite'

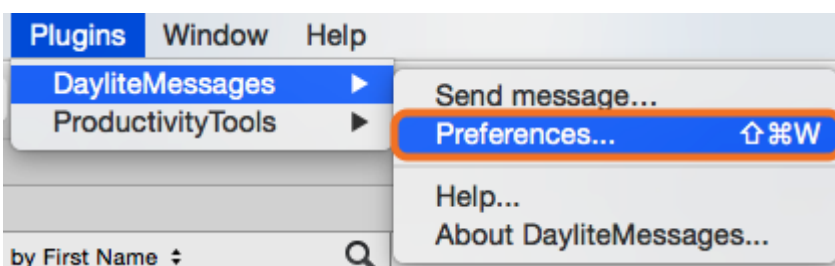


7. After the installation DayliteMessages can be used for 14 days free of charge. If you would like to use it after these 14 days, please proceed to chapter '[Licensing](#)'.

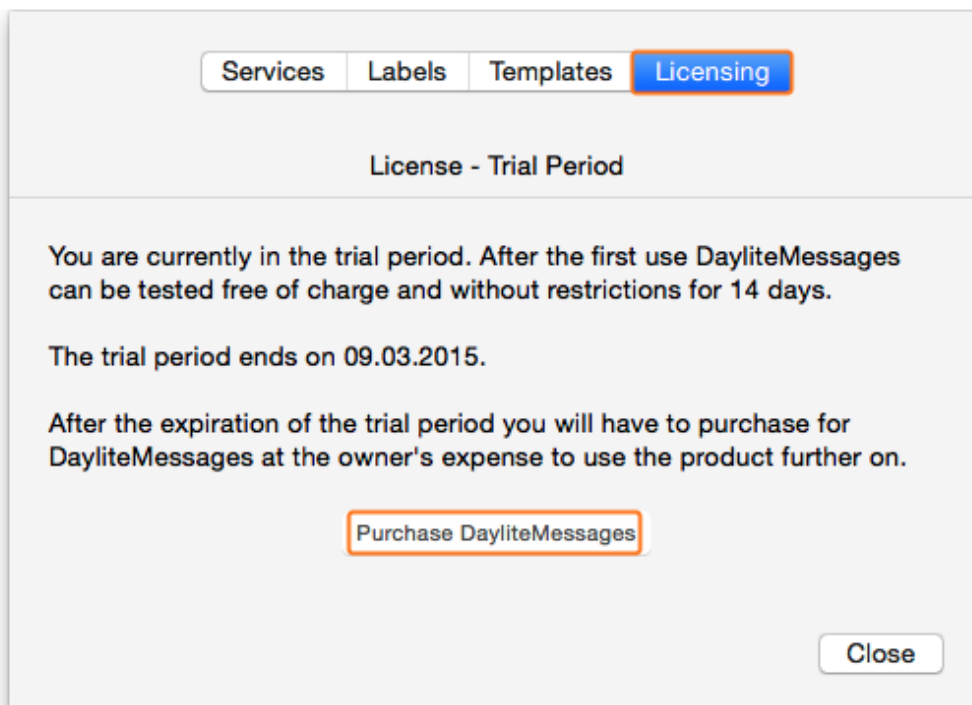
Licensing

After the installation it is possible to test [DayliteMessages](#) during a 14 day trial period. If you would like to continue using the plug-in, you need to purchase a license. In order to purchase DayliteMessages, please follow these steps (given the plugin is already installed):

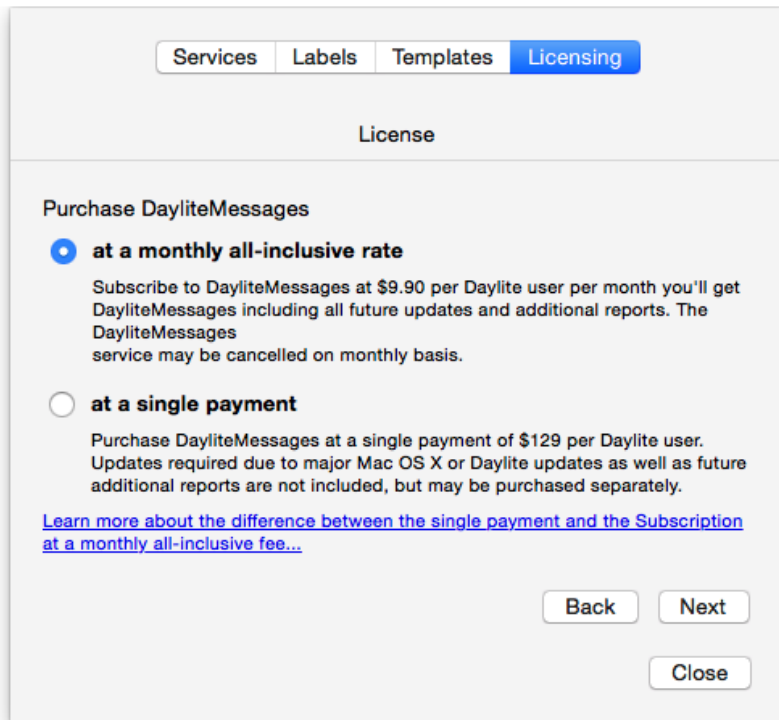
1. Start Daylite
2. In the Daylite menu select Plugins --> DayliteMessages --> Preferences...



3. Select the License tab and click Purchase DayliteMessages...



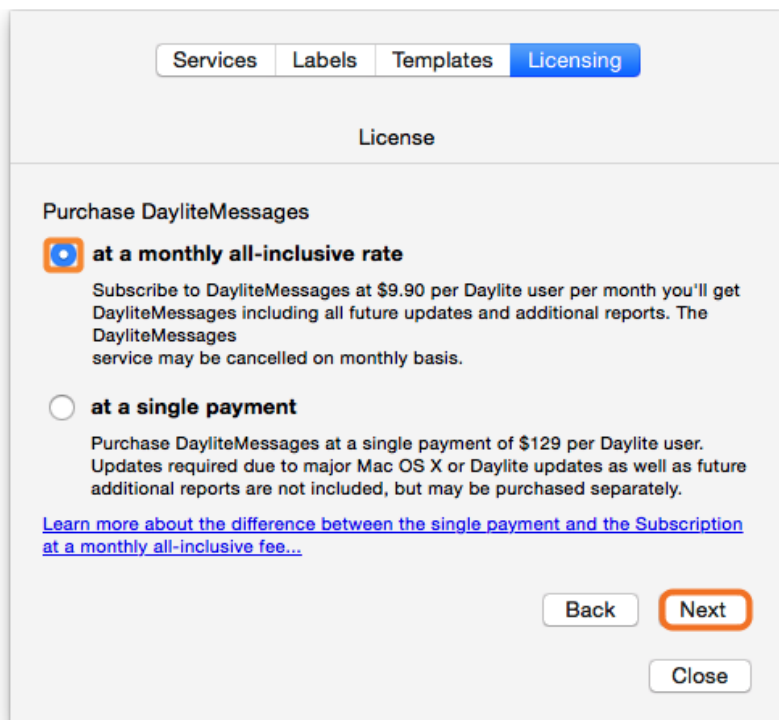
4. Select whether you would like to subscribe to DayliteMessages as a monthly service or to purchase it at a single payment.



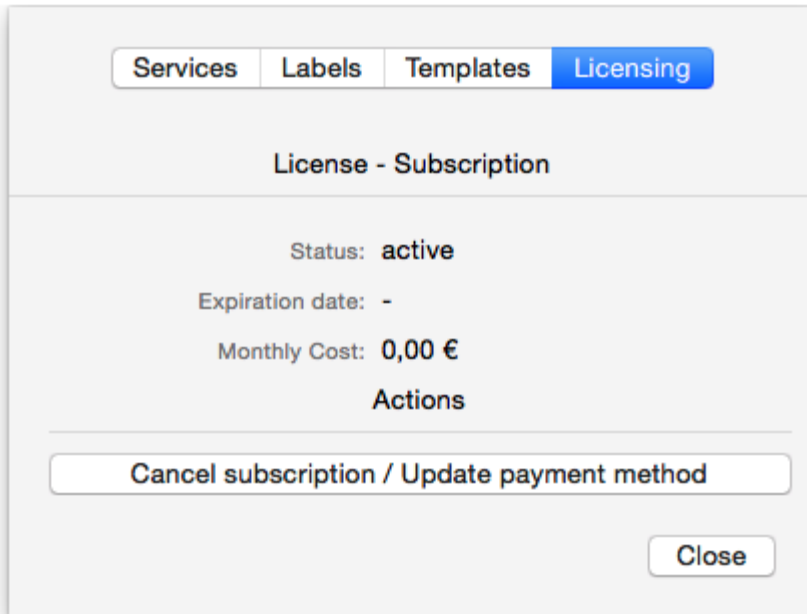
DayliteMessages Subscription

If you would like to subscribe to the DayliteMessages , please do the following:

1. Click on the button at a monthly all-inclusive rate and then on Next



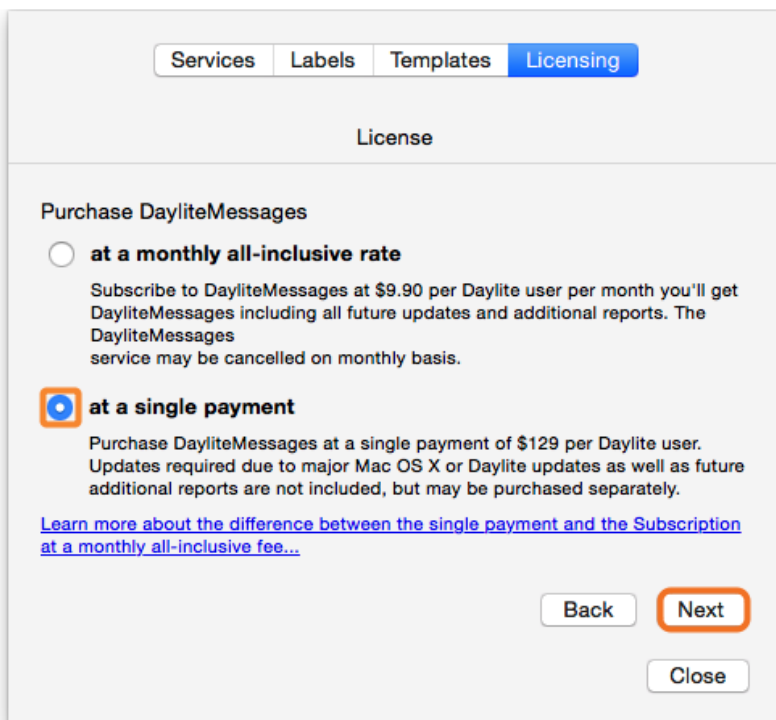
After completing all steps you'll see this window



Purchase DayliteMessages

If you would like to purchase DayliteMessages, please do the following:

1. Click on the button at a single payment and then on Next



After completing all steps you'll see this window

Services Labels Templates **Licensing**

License - License overview

DayliteMessages is licensed. Thank you for your purchase!

Close

Usage

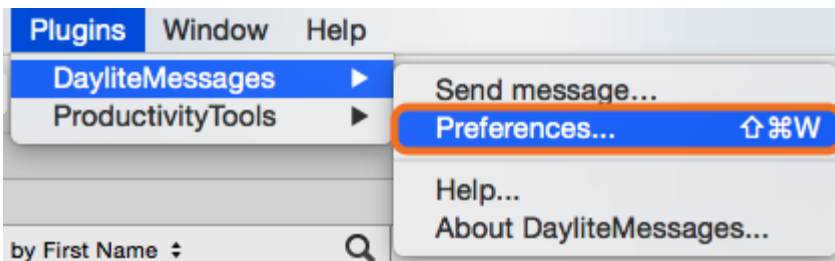
Configuration

In order to work correctly, DayliteMessages needs to be configured accordingly.

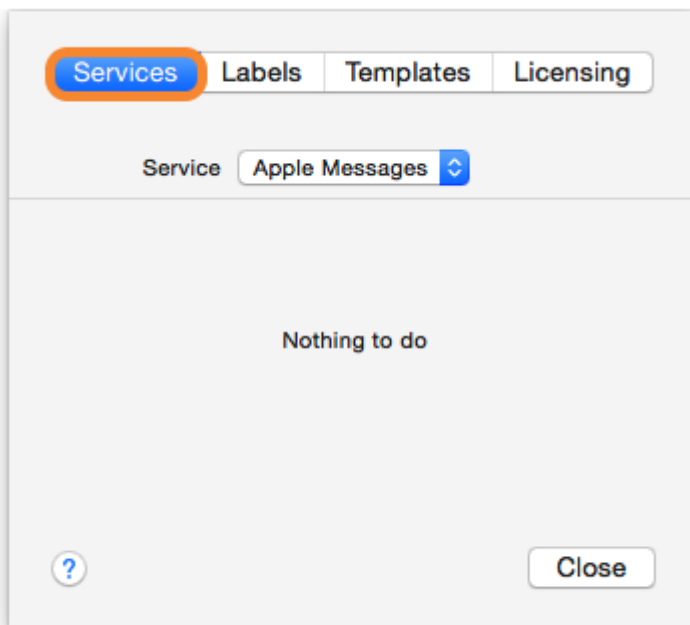
Select SMS Service

To be able to send SMS text messages, you need to select your preferred SMS service:

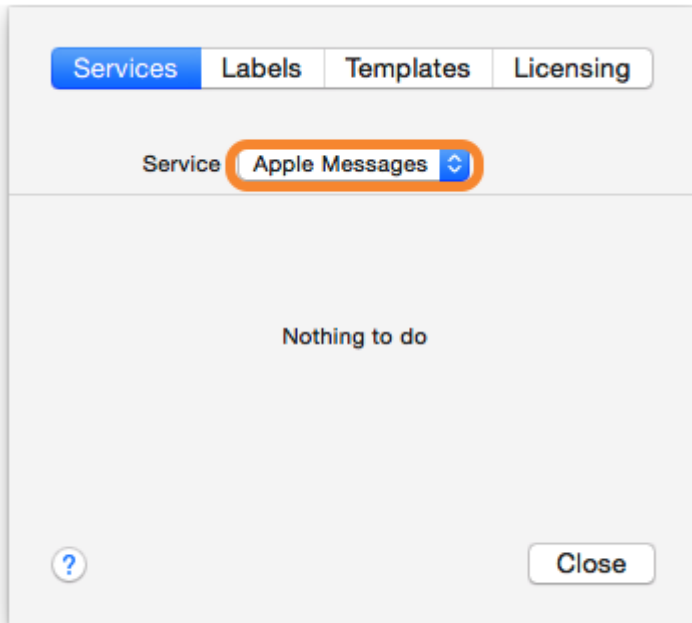
1. Start Daylite
2. In the Daylite menu navigate to Plugins -> DayliteMessages -> Preferences...



3. Select the Services tab



4. Select the desired SMS service from the Service drop-down menu



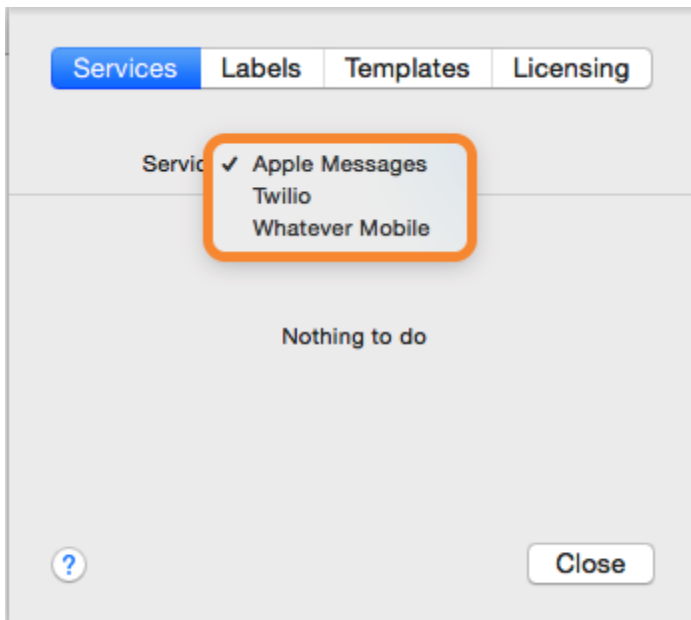
DayliteMessages supports the following SMS services:

Apple Messages (preinstalled on every Mac)

Twilio

Whatever Mobile

Please find additional information on the particular services below.

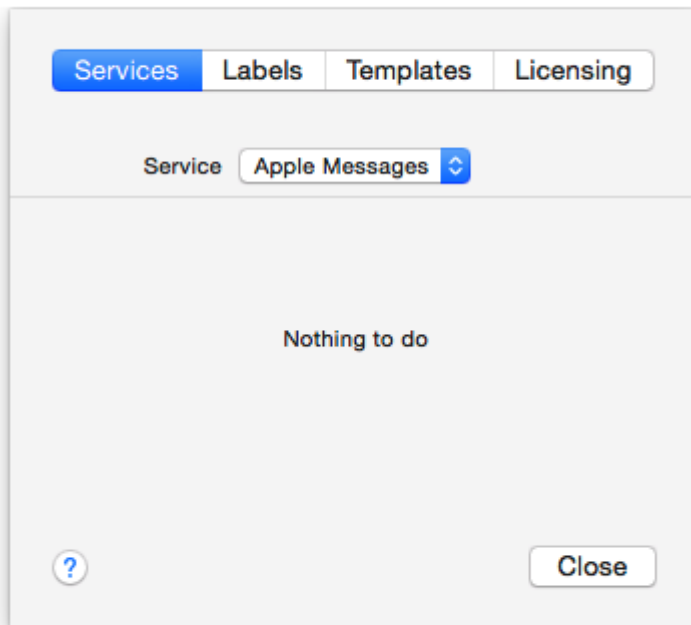


Apple Messages

It is possible to use your iPhone to send SMS text messages via DayliteMessages.

This feature requires OS X 10.10 Yosemite to be installed on your Mac and iOS 8 on your iPhone. If your setup meets these requirements, please make sure to connect your iPhone with your Mac as described in this [Apple knowledge base article](#) in chapter "SMS"

Additional configuration is not required



Twilio

Twilio provides SMS text message services among other communication services. To use this service you need to create an [account](#) first.

More information on Twilio can be found [here](#).

Enter your SID and the Secret in the appropriate fields. To retrieve this information log on to your Twilio account and click **Show API Credentials** in your dashboard

The last required piece of information is a phone number to send the SMS text messages. This number is also available in your Twilio account..

Enter this number in the appropriate field and make sure to include the country code (e.g. +49)

- (1) Enter your Twilio SID
- (2) Enter your Twilio Secret
- (3) Enter your Twilio phone number

The image shows a configuration dialog box with four tabs: Services, Labels, Templates, and Licensing. The 'Services' tab is selected. Below the tabs, there is a 'Service' dropdown menu with 'Twilio' selected. Below this, there are three input fields: 'SID', 'Secret', and 'Phone number'. Each input field has a small orange circle with a number (1, 2, and 3 respectively) next to it. At the bottom left, there is a question mark icon, and at the bottom right, there is a 'Close' button.

Whatever Mobile

Whatever Mobile is an enterprise communication provider specialized in sending SMS text messages via network provider in Germany, Austria and Switzerland.

Please contact [Whatever Mobile](#) to request an account.

Please note: sending SMS text messages via Whatever Mobile requires an internet connection with a static external IP address and uses German, Austrian and Swiss carriers.

- (1) Enter your Whatever Mobile user name
- (2) Enter your Whatever Mobile password
- (3) Enter an [arbitrary](#) phone number. Please make sure to include the country code (e.g. +49).

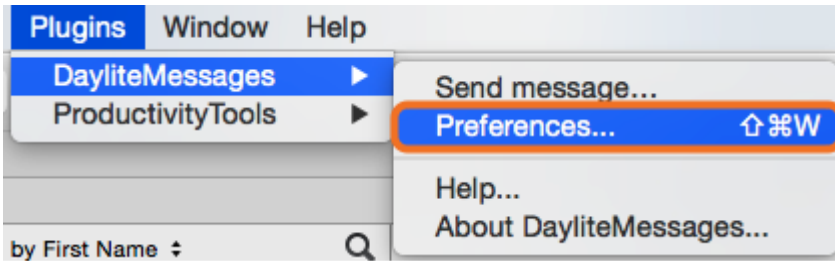
The image shows a configuration dialog box with four tabs: Services, Labels, Templates, and Licensing. The 'Services' tab is selected. Below the tabs, there is a 'Service' dropdown menu with 'Whatever Mobile' selected. Below this, there are three input fields: 'Username', 'Password', and 'Phone number'. Each input field has a small orange circle with a number (1, 2, and 3 respectively) next to it. At the bottom left, there is a question mark icon, and at the bottom right, there is a 'Close' button.

Labels

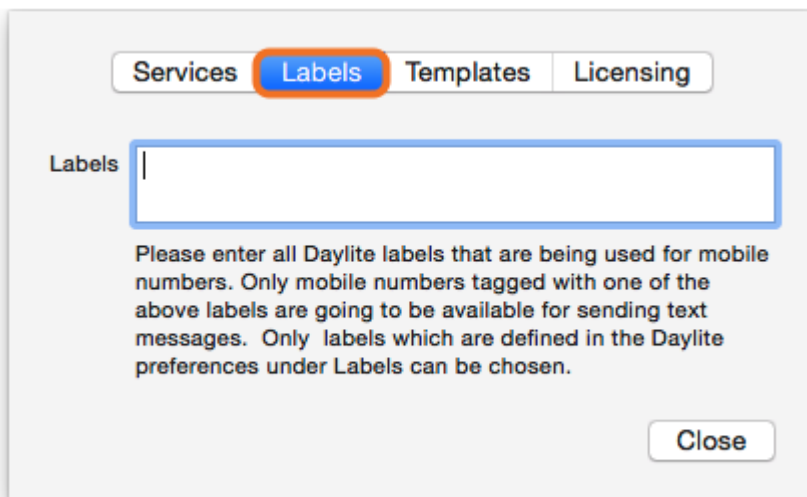
As DayliteMessages sends SMS text messages to cell (mobile) phones only, you need to provide DayliteMessages with all your Daylite cell (mobile) phone labels.

To do so, please follow these steps:

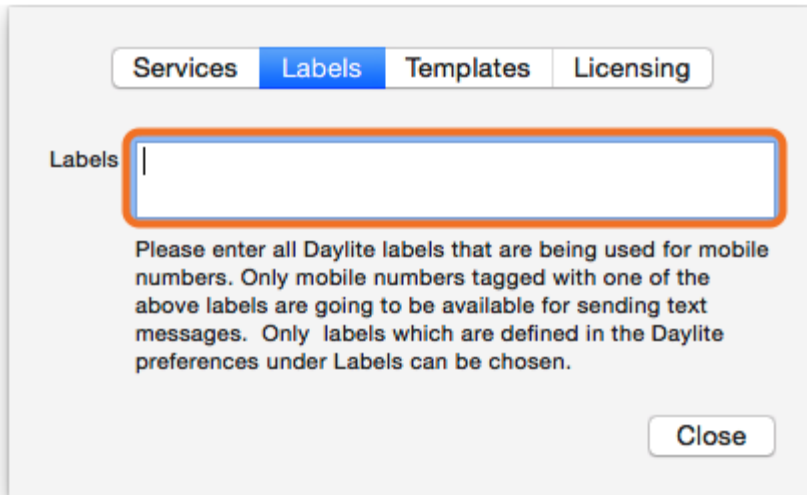
1. In the Daylite menu navigate to Plugins -> DayliteMessages -> Preferences...



2. Select the Labels tab

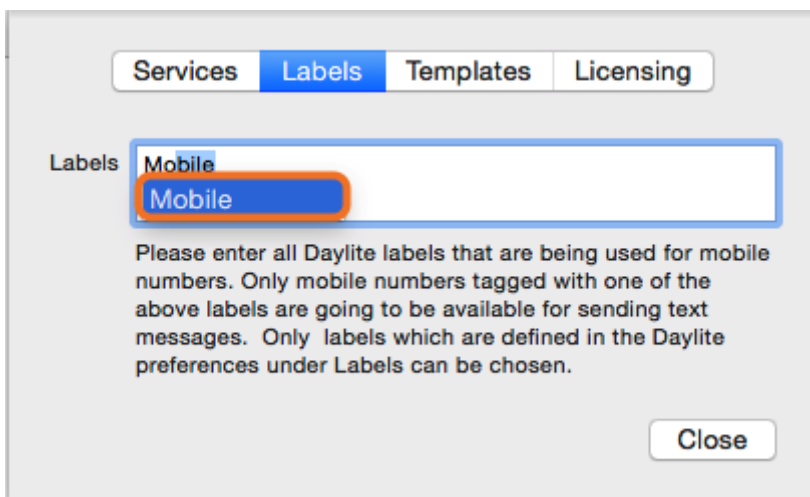


3. Click the Labels box

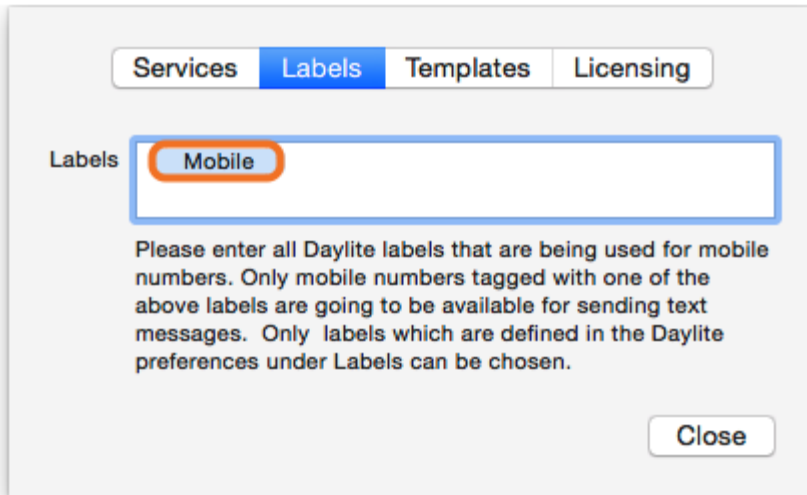


4. Enter the desired cell (mobile) phone number label(s). As soon as you start typing, DayliteMessages will suggest existing Daylite labels. Confirm your selection with the enter key.

Please note: Only existing Daylite labels can be added.



5. Phone number stored in Daylite with the label Mobile will now be used to send SMS text messages to.



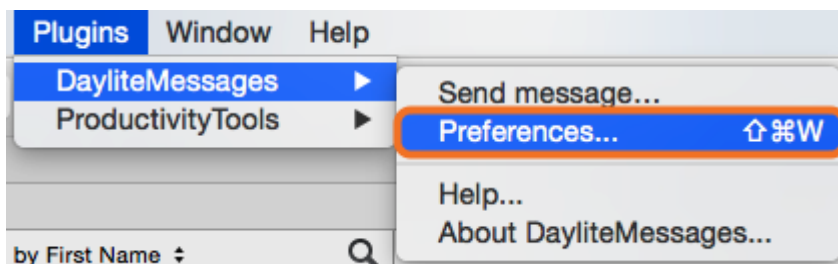
Message Templates

Conveniently create different message templates in DayliteMessages. Templates can consist of regular text and merge keys. Merge keys in DayliteMessages work the same way as merge keys in Daylite letter templates.

Example: You want to send Daylite contact John Doe a SMS text message. If the message templates contains the merge key First Name, DayliteMessages will replace this merge key with the contact's actual first name John.

Follow these steps to create message templates:

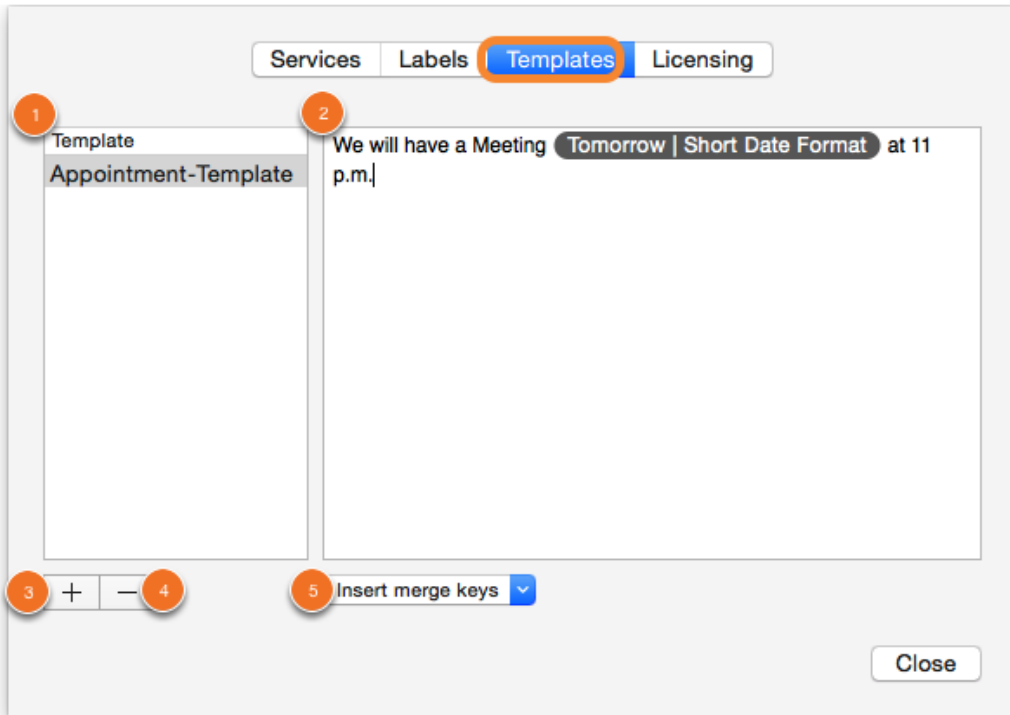
1. In the Daylite menu navigate to Plugins -> Plugins -> DayliteMessages -> Preferences...



2. Select the Template tab

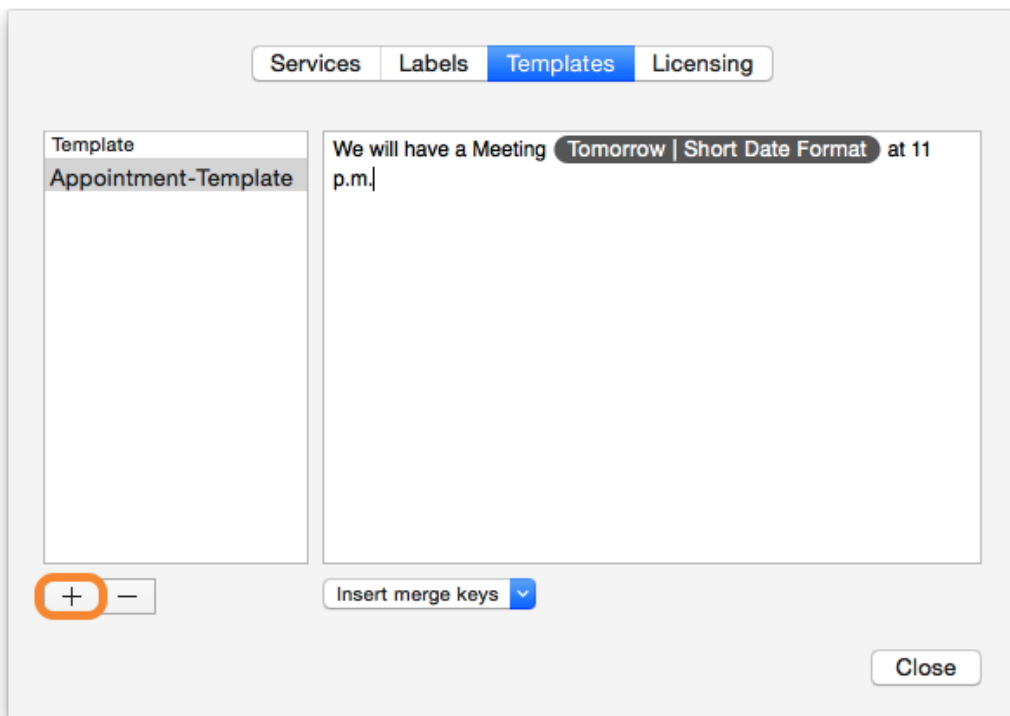
- (1) List of your existing templates
- (2) Body of selected template
- (3) Click to create new template
- (4) Click to delete selected template

(5) Select merge key from drop-down menu

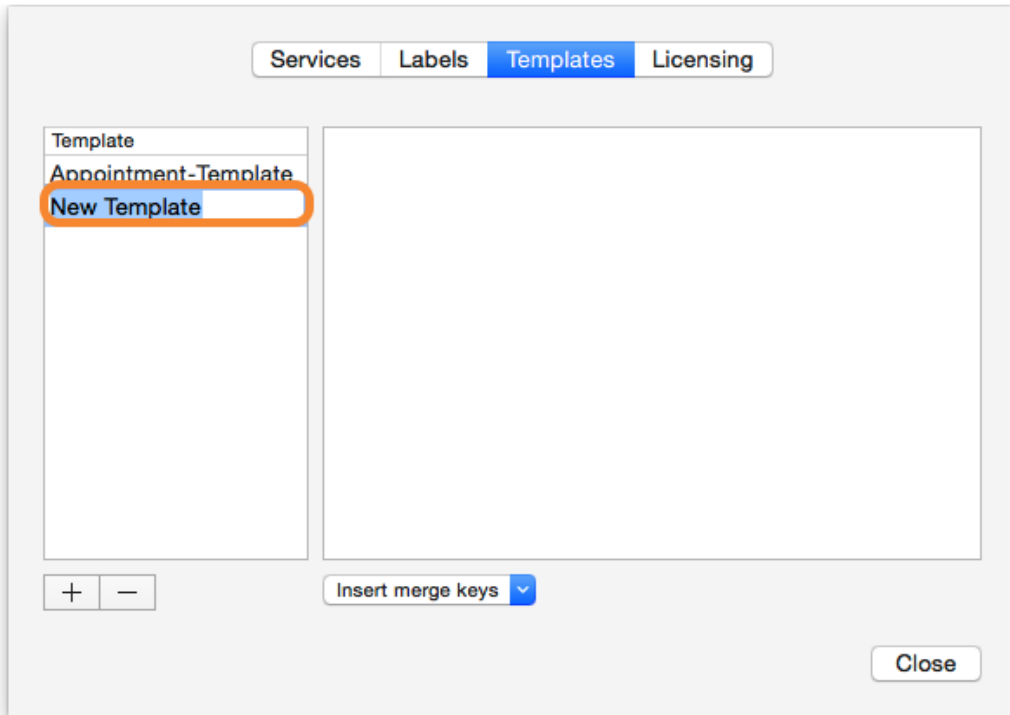


Create Template

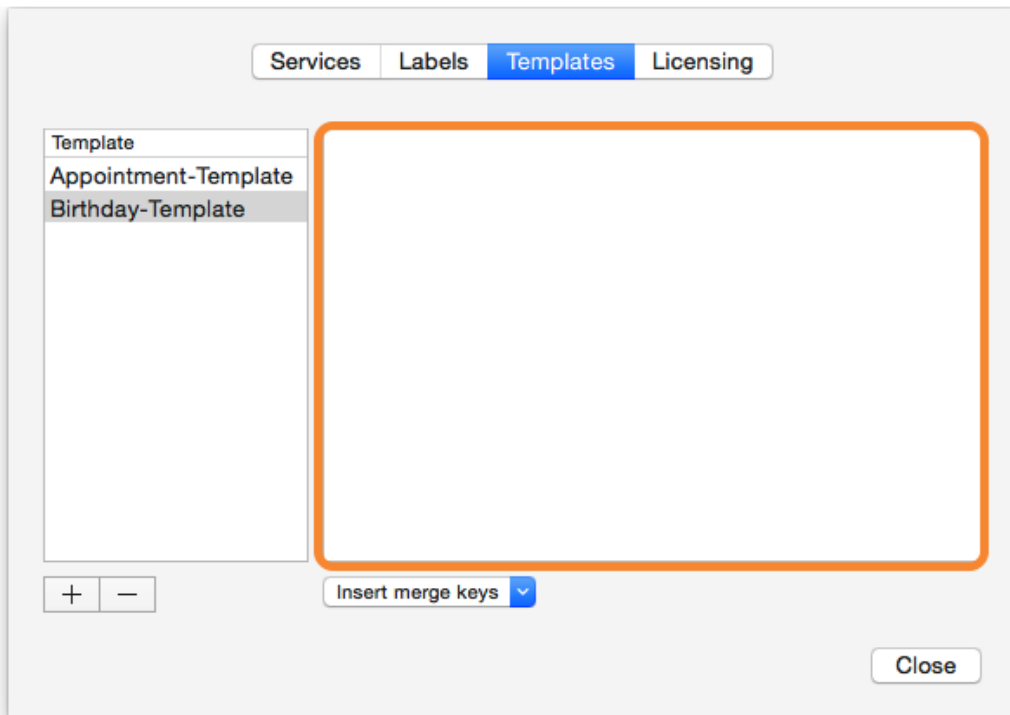
1. Click the plus sign to create a new template



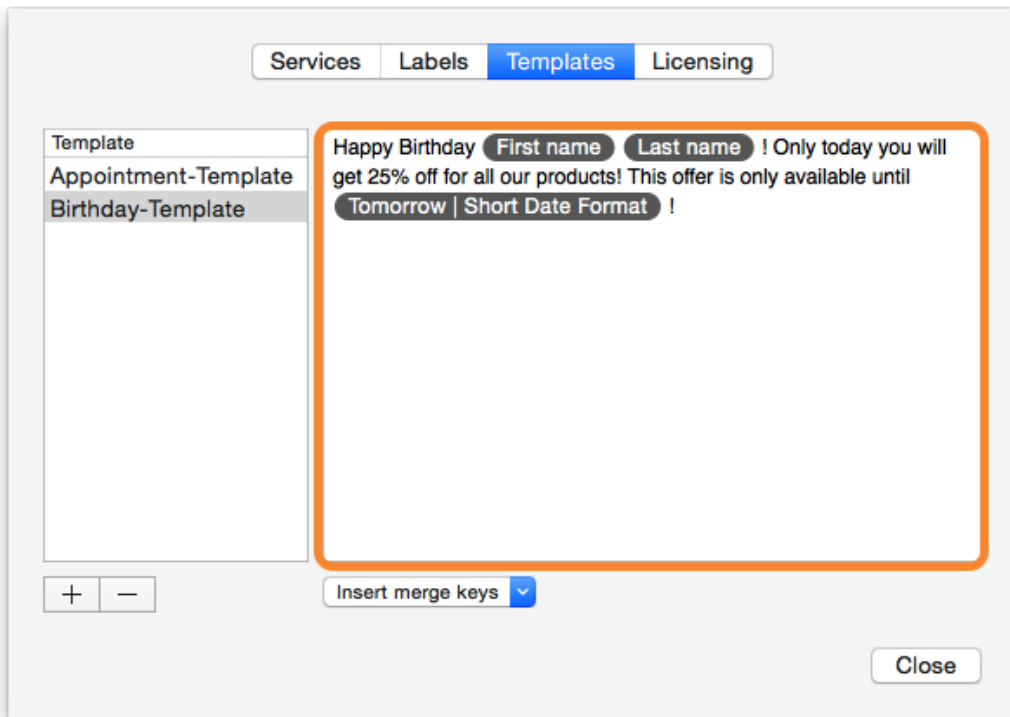
2. Enter the title of your new template



3. Click the right hand text box to enter the body of your message template
Enter the desired message body and use merge keys to add dynamic content.

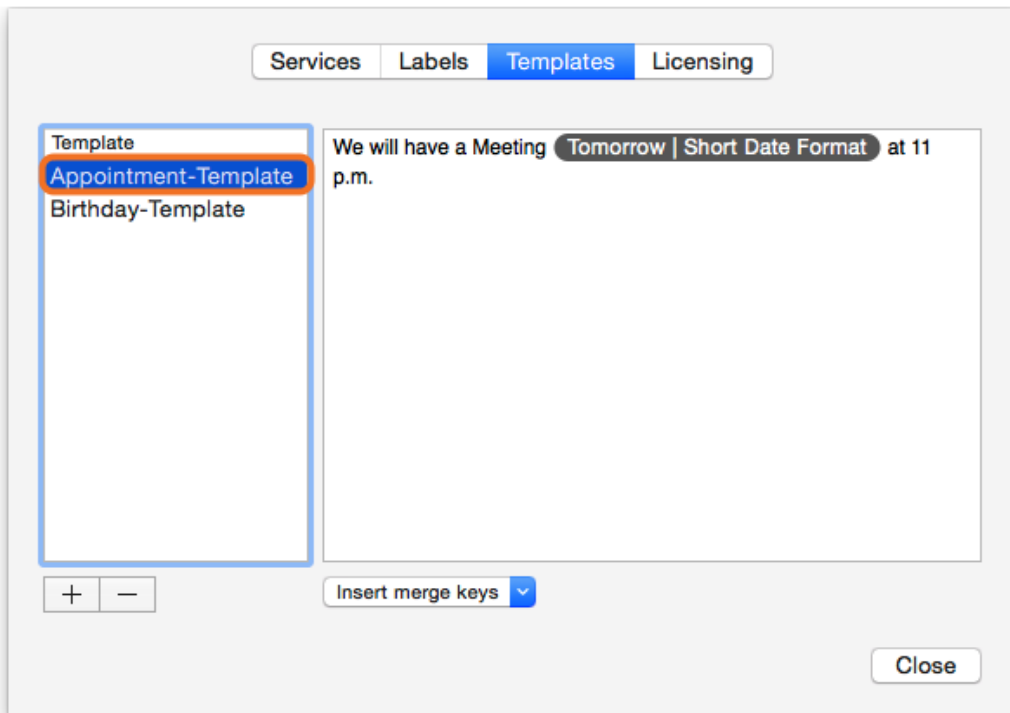


4. Once the message body has been entered, the template is ready to be used to send SMS text messages



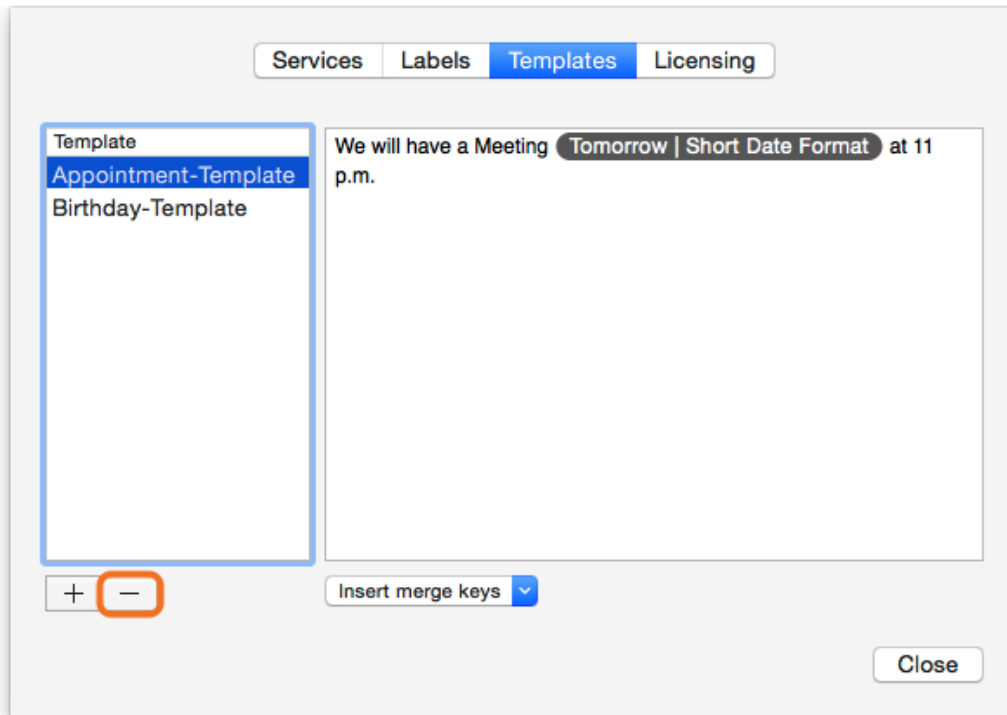
Delete Templates

1. Select the template from the list



2. Click the minus sign to delete the template.

Please note: This process cannot be undone!

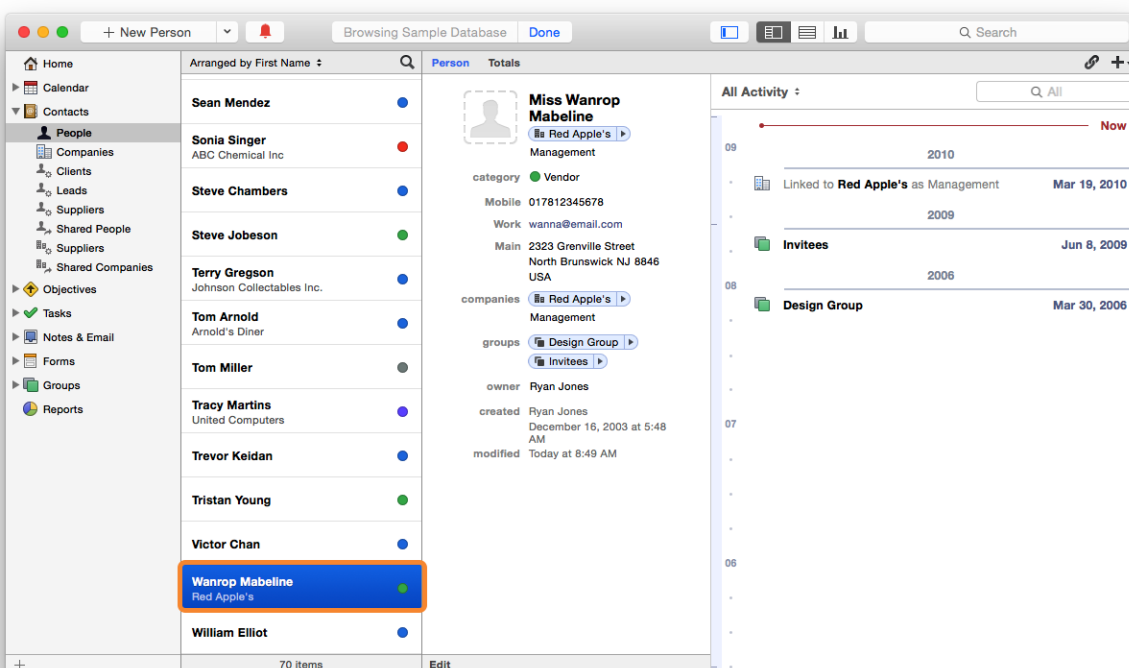


Sending SMS Text Messages

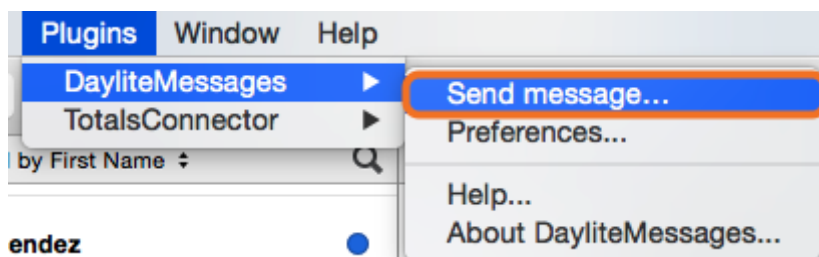
The following describes how to send text messages with DayliteMessages.

Please make sure to configure DayliteMessages beforehand as described in chapter [Configuration](#)

1. Select one or more recipients



2. In the Daylite menu navigate to Plugins -> DayliteMessages -> Send message...

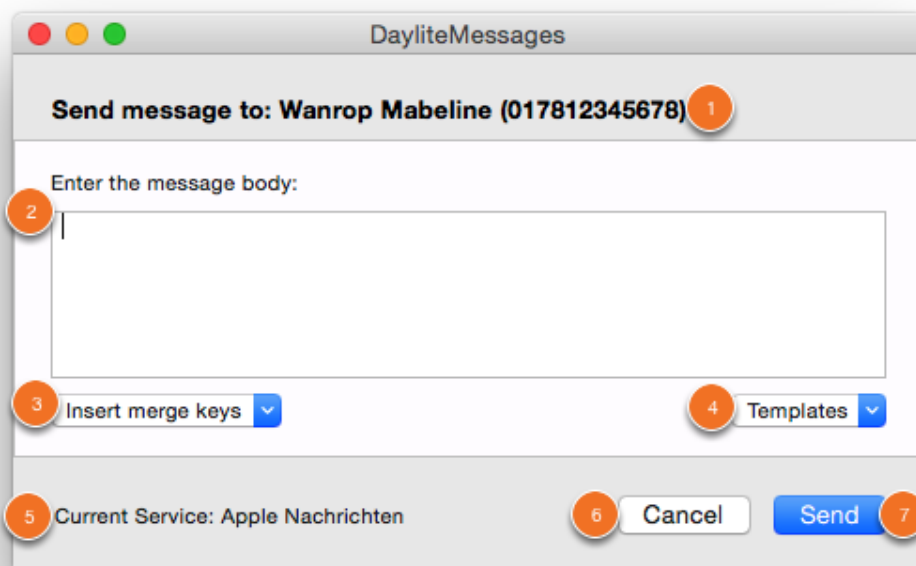


3. The message window opens

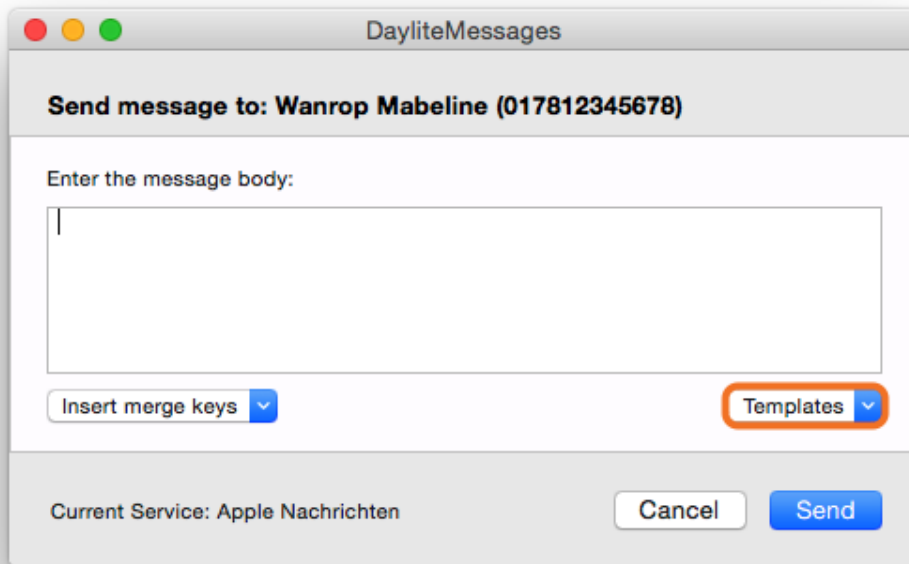
(1) Recipient information

- (2) Enter desired messages text
- (3) Enter merge key(s)
- (4) Select existing templates from the drop-down menu
- (5) Selected service provider
- (6) Cancel
- (7) Click to send text message

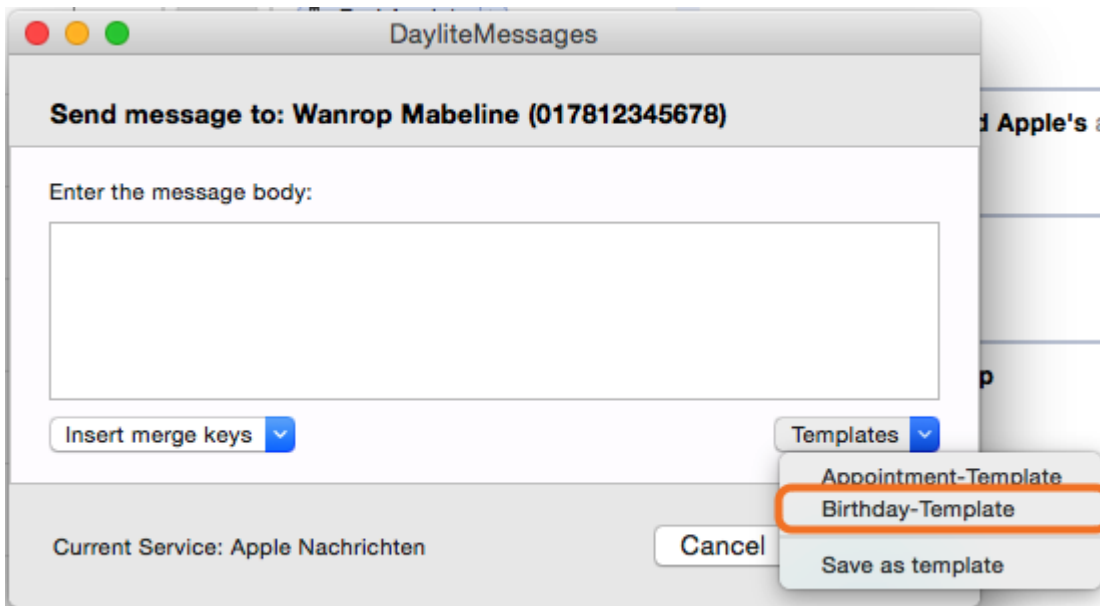
In the following example we are going to use the template created previously in chapter [Message Templates](#)



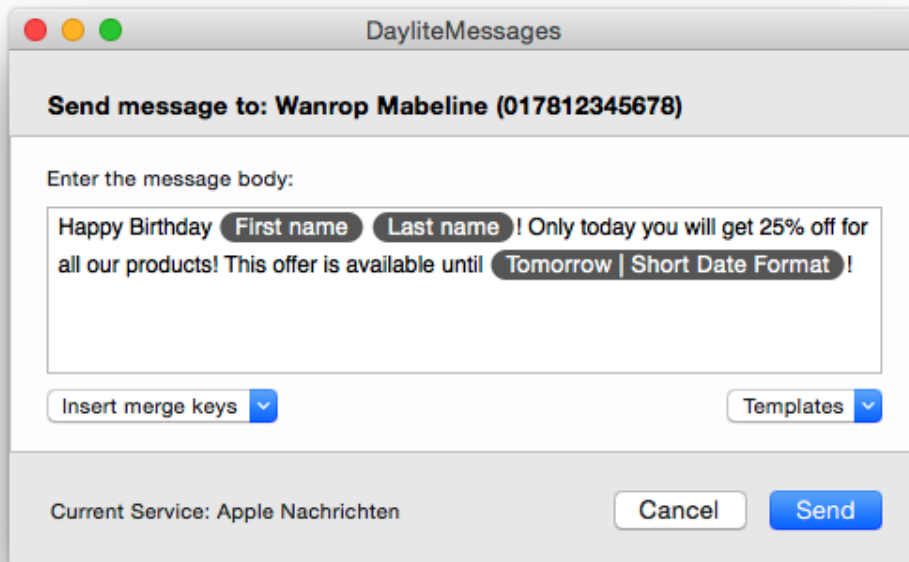
4. Click the Templates drop-down menu



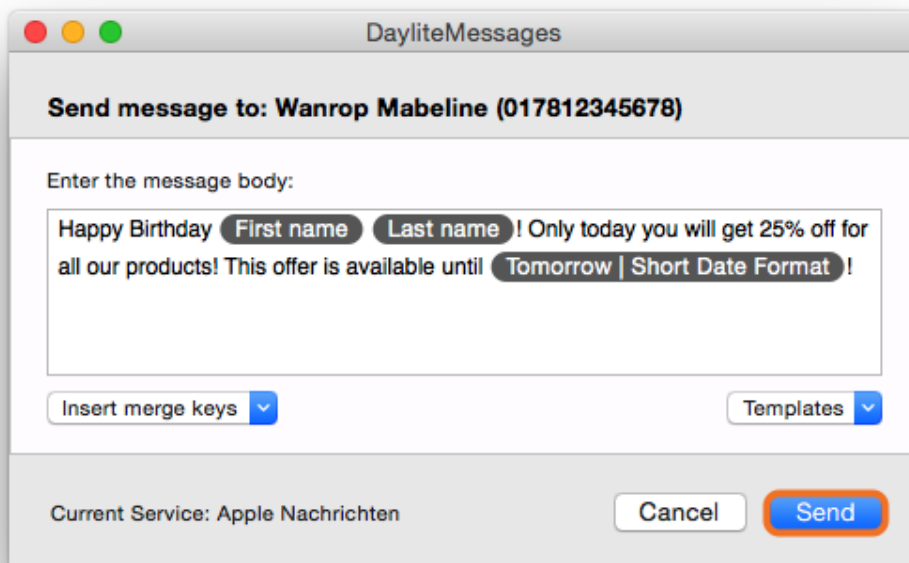
5. Select the desired template



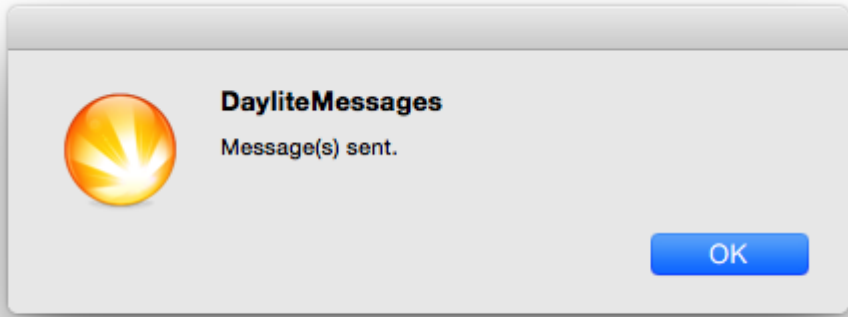
5. The template text will be loaded and may be altered without affecting the actual template. If you would like to save the altered text as a template, click the Templates drop-down menu and select Save as template.



6. Send text message by clicking the Send button



7. You will receive a feedback message which will also be stored in the recipient's history

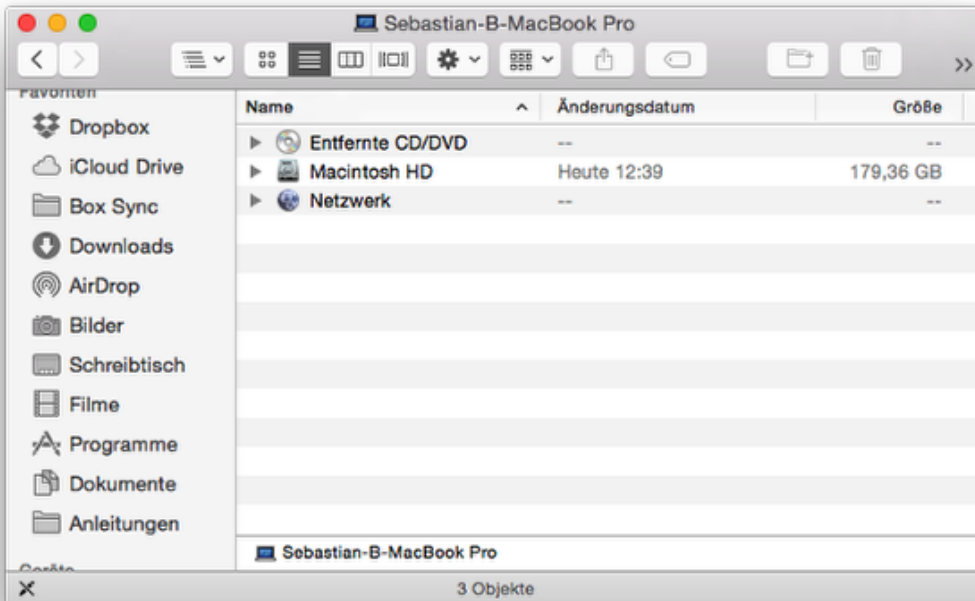


Miscellaneous

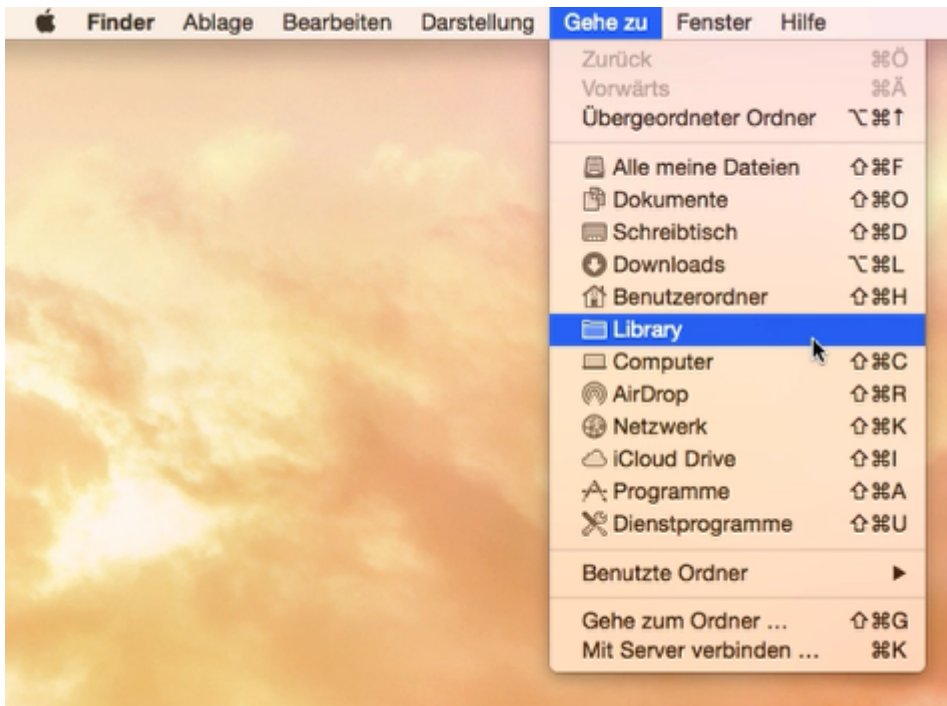
Removing the Plug-in

Follow these steps to deinstall a Daylite plugin

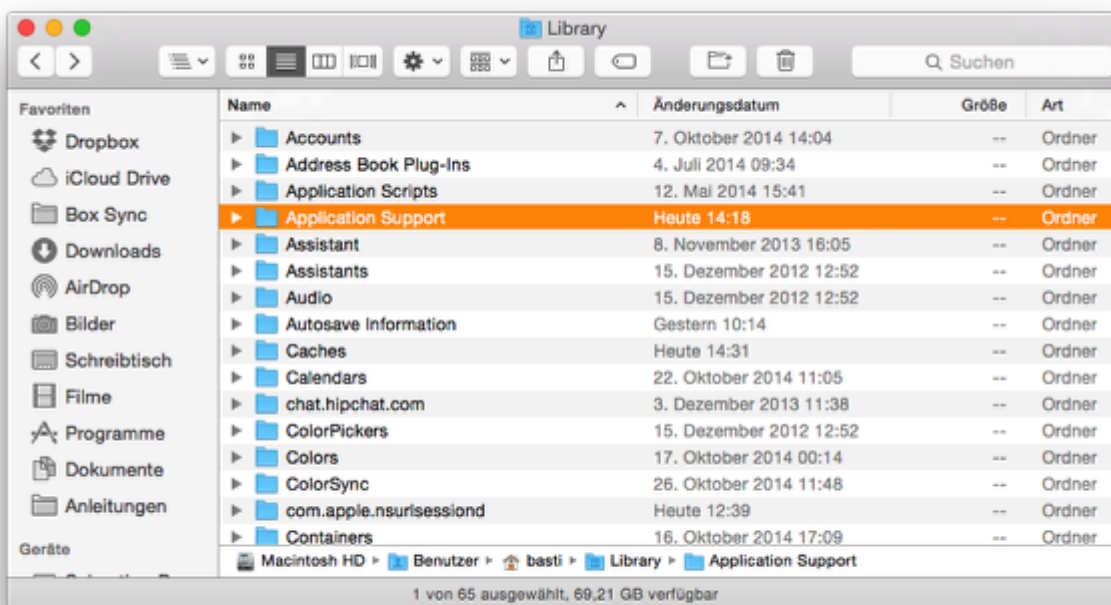
1. Open Finder



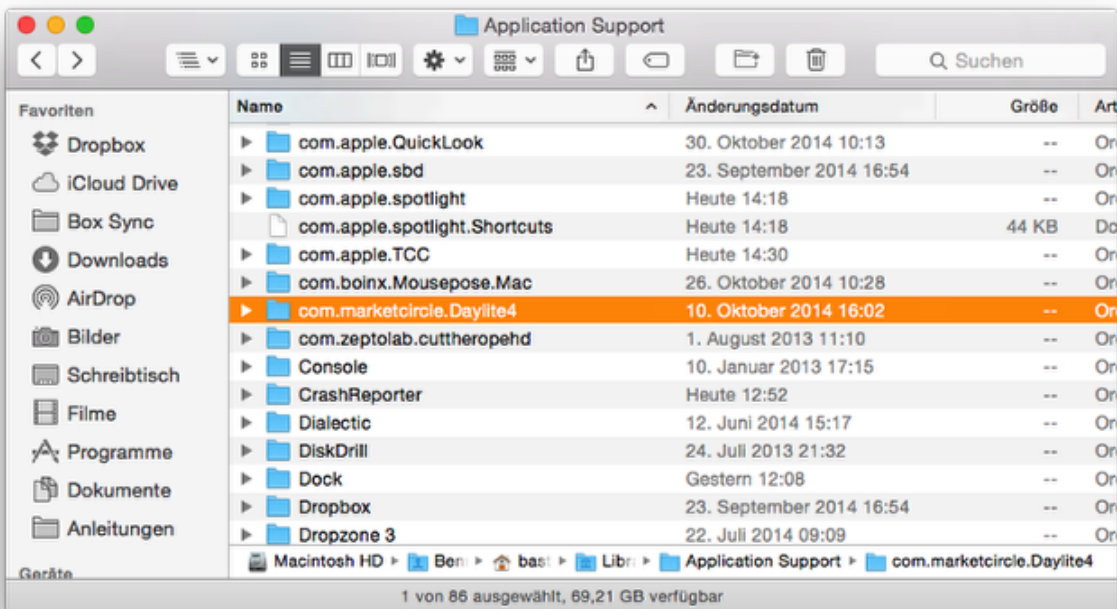
2. In the menu bar select Go and hold down the ⌘ alt key. The Library folder will appear



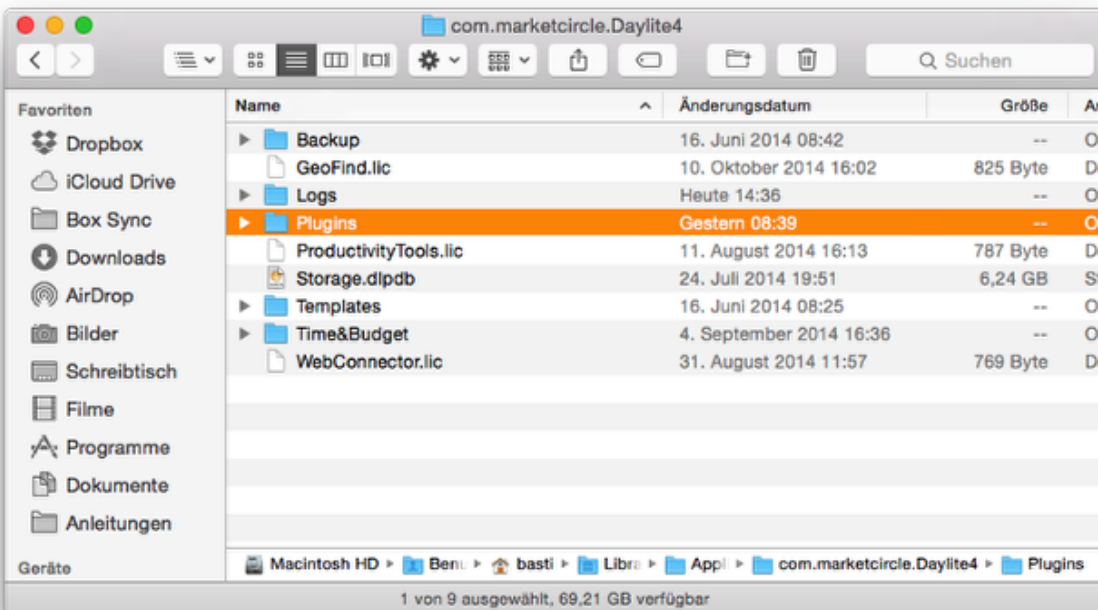
4. Navigate to the folder Application Support ->



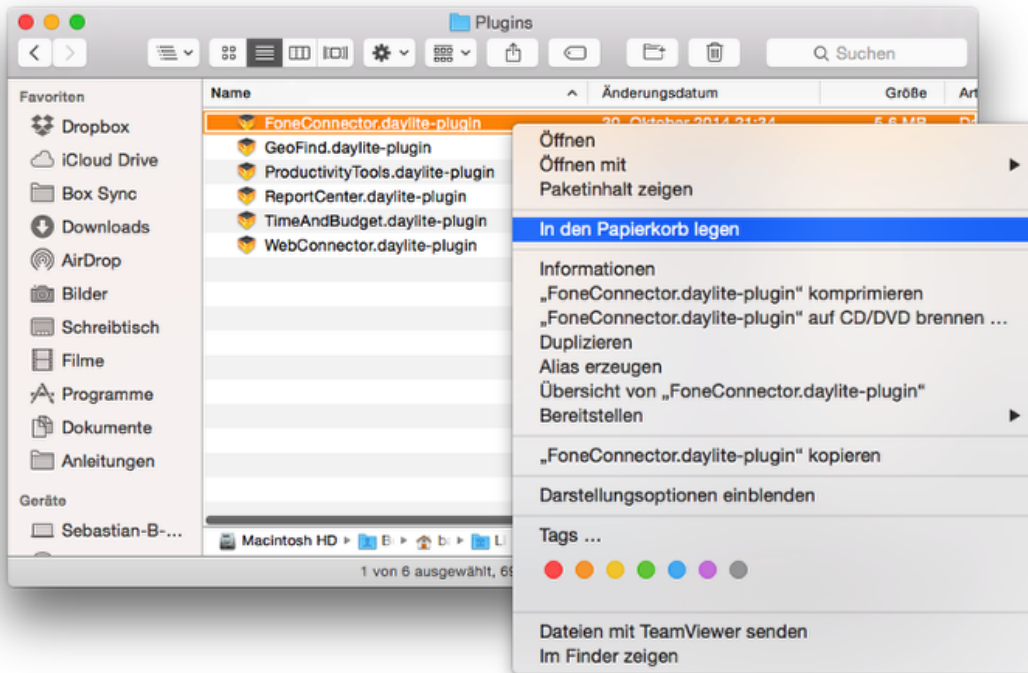
5. -> com.marketcircle.Daylite4 ->



6. -> Plugins



7. Delete the file DayliteMessages.daylite-plugin



8. Restart Daylite