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.

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At	oout This Mac			
Sy Ap	vstem Preference	es		re I
Re	ecent Items			•
Fo	orce Quit Screen	Steps	心心	#U
SI Re Sh	eep estart nut Down			
Lo	og Out Daniel Na	uerz	Û	жQ

3. Double-click 'DayliteMessages_for_Daylite.dmg'.



DayliteMessages for Daylite.dmg

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



5. Click install

Install plugin Are you sure you want to install the plugin 'DayliteMessages' on this machine?
Cancel

6. To finalize the installation click 'Restart Daylite'

	Success
V	Plugin 'DayliteMessages' Successfully installed. Daylite will now restart for the changes to take effect.
	Restart Daylite
	Thestalt Dayine

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 '<u>Licensing</u>'.

Licensing

After the installation it is possible to test DayliteMessages during a 14 day trial period. If you woud 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...

Plugins	Window	Help		
Daylite Produc	Messages tivityTools	•	Send message Preferences	<mark></mark> ጉ
by First Nam	e \$	Q	Help About DayliteMessag	jes

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

	Services	Labels	Templates	Licensing	
		License	- Trial Period		
You are cur can be test	rently in the t ed free of cha	rial period arge and w	. After the first ithout restrict	t use DayliteN ions for 14 da	lessages lys.
The trial pe	riod ends on	09.03.201	5.		
After the ex DayliteMess	piration of the	e trial perio owner's ex	od you will ha pense to use	ve to purchas the product f	e for urther on.
		Purchase [DayliteMessages	3	
					Close

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

	Services Labels Templates Licensing
	License
_	
Purc	hase DayliteMessages
0	at a monthly all-inclusive rate
~	Subscribe to DayliteMessages at \$9.90 per Daylite user per month you'll get DayliteMessages including all future updates and additional reports. The DayliteMessages service may be cancelled on monthly basis.
\bigcirc	at a single payment
	Purchase DayliteMessages at a single payment of \$129 per Daylite user. Updates required due to major Mac OS X or Daylite updates as well as future additional reports are not included, but may be purchased separately.
Lear	n more about the difference between the single payment and the Subscription
<u>at a i</u>	nonthly all-inclusive fee
	Back Next
	Close

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

	Services	Labels	Templates	Licensing	
	Cervices	Lubeij	Templates	Licensing	
		Li	cense		
Purchase	DavliteMessa	aes			
🚺 at a	monthly all-i	o nclusive r	ate		
Subs Daylit Daylit servic	cribe to DayliteM eMessages incl eMessages ce may be cance	Messages at uding all fut elled on mor	\$9.90 per Dayli ure updates and hthly basis.	te user per month you'll get I additional reports. The	
🔿 at a	single payme	nt			
Purch Upda additi	ase DayliteMess tes required due onal reports are	sages at a s to major M not include	ingle payment o ac OS X or Dayl d, but may be p	f \$129 per Daylite user. ite updates as well as future urchased separately.	
Learn more at a monthl	about the differ y all-inclusive fe	ence betwe	en the single pa	yment and the Subscription	
				Back Next	
				Close	
					_

After completing all steps you'll see this window

Services	Labels	Templates	Licensing
	License -	Subscription	
	Status:	active	
Expira	ation date:	-	
Mor	nthly Cost:	0,00 €	
	4	Actions	
Cancel su	bscription	/ Update payr	ment method
			Close

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

	Sen	ices Lat	als	Templates	Licensing	
	Con	loco Lui	2013	Templates	Licensing	
			Lic	cense		
Purc	hase Daylitel	Vessages				
\bigcirc	at a monthly	y all-inclus	ive ra	te		
	Subscribe to D DayliteMessag DayliteMessag service may be	ayliteMessa es including es e cancelled o	ges at \$ all futur on monti	\$9.90 per Dayli re updates and hly basis.	te user per mon I additional repo	th you'll get orts. The
	at a single p	ayment				
	Purchase Dayl Updates requir additional repo	iteMessages ed due to ma erts are not ir	at a sin ajor Mao ncluded	ngle payment o c OS X or Dayl , but may be p	f \$129 per Dayli ite updates as v urchased separ	ite user. vell as future ately.
Learr at a r	more about th	e difference	betweer	n the single pa	yment and the	Subscription
<u>ur ur</u>	inoniting an inon					
					Back	Next
						Close

After completing all steps you'll see this window

s	ervices	Labels	Templates	Licensing				
	L	icense - L	icense overvie	w				
DayliteN	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

Templates	Licensing
Messages ᅌ	
thing to do	
	Close
	Templates Messages 🗘

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

Services	Labels	Templates	Licensing
Servi			
	co Apple		
	Not	hing to do	
?			Close

DayliteMessages supports the following SMS services:

Apple Messages (preinstalled on every Mac)

Twilio

Whatever Mobile

Please find additional information on the particular services below.

Services	Labels	Templates	Licensing
Servio	✓ Apple	Messages	
	Whate	ver Mobile	
	Not	hing to do	
?			Close

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 requirement, please make sure to connect your iPhone with your Mac as described in this <u>Apple knowledge base article</u> in chapter "SMS"

Additional configuration is not required

Services	Labels	Templates	Licensing
Servi	ce Apple	Messages ᅌ	
	Not	hing to do	
	NOL	ning to do	
0			Close
•			Cidae

Twilio

Twilio provides SMS text message services among other communication services. To use this service you need to create an <u>account</u> 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

Services	Labels	Templates	Licensing
Servio	ce Twilio	\$	
SIE			
Secre	t		
Phone numbe	r		
?			Close

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 <u>Whatever Mobile</u> 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 <u>arbitrary</u> phone number. Please make sure to include the country code (e.g. +49).

Services	Labels	Templates	Licensing
Servio	whate	ver Mobile ᅌ	
Username	•		
Password			
Phone number	r 🦳		
?			Close

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...

Plugins	Window	Help		
Daylite	Messages	•	Send message	
Produc	tivityTools	•	Preferences	企業W
by First Nam	e \$	Q	Help About DayliteMessage	es

2. Select the Labels tab

	Services	Labels	Templates	Licensing	
Labels	1				
	Please ente numbers. O above label: messages. preferences	r all Daylite I nly mobile n s are going t Only labels under Labe	labels that are b umbers tagged to be available fo which are defin Is can be chose	eing used for m with one of the or sending text ed in the Daylite n.	obil
	Please ente numbers. O above label messages. preferences	r all Daylite I nly mobile n s are going t Only labels under Labe	labels that are b umbers tagged to be available fr which are defin Is can be chose	eing used for m with one of the or sending text ed in the Daylite n.	obil

3. Click the Labels box

	Services	Labels	Templates	Licensing
Labels				
	'			
	Please ente	r all Davlite	labele that are b	aing used for mobile
	numbers. O above labels messages. preferences	nly mobile n s are going t Only labels under Labe	to be available for which are defined which are	with one of the or sending text ed in the Daylite n.

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.

Ĺ	Services	Labels	Templates	Licensing
Labels	Mobile Mobile			
	Please enter numbers. Or above labels messages. preferences	r all Daylite nly mobile n s are going t Only labels under Labe	labels that are b numbers tagged to be available f which are defin els can be chose	eing used for mobile with one of the or sending text ed in the Daylite m.

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

	Services	Labels	Templates	Licensing
Labels	Mobile)		
	Please enter numbers. Or above labels messages. preferences	r all Daylite nly mobile n s are going t Only labels under Labe	labels that are b umbers tagged to be available fo which are defin Is can be chose	eing used for mob with one of the or sending text ed in the Daylite n.

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

	Services Labels Templates Licensing	
Template Appointment-Templ	We will have a Meeting Tomorrow Short Date Format p.m.	at 11
3 + -4	5 Insert merge keys 🔽	Close

Create Template

1. Click the plus sign to create a new template

	Services Labels Templates Licensing	
Template	We will have a Meeting Tomorrow Short D	ate Format at 11
Appointment-Tem	plate p.m.	
+ -	Insert merge keys 🔽	
		Close

2. Enter the title of your new template

	Services Labels Templates Lic	ensing
		Jensing
Template		
Appointment-Tem	plate	
New Template		
+ -	Insert merge keys 🔽	
		Close

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.

	Services	Labels	Templates	Licensing	
Template					
Appointment-Templa	te				
Birthday-Template					
+ -	Inse	rt merge key	/5 🔽		
					Close

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

Serv	vices Labels Templates Licensing
Template	Happy Birthday First name Last name ! Only today you will
Appointment-Template	get 25% off for all our products! This offer is only available until
Birthday-Template	Tomorrow Short Date Format
+ -	Insert merge keys

Delete Templates

1. Select the template from the list

	Services Labels Templates Licensing
Template Appointment-Templa Birthday-Template	te We will have a Meeting Tomorrow Short Date Format at 11 p.m.
+ -	Insert merge keys V

2. Click the minus sign to delete the template.

Please note: This process cannot be undone!

	Services Labels Templates Licensing
Template Appointment-Temp Birthday-Template	We will have a Meeting Tomorrow Short Date Format at 11 p.m.
+ -	Insert merge keys
	Close

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 <u>Configuration</u>

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 <u>Message Templates</u>

Enter the message body:		
3 Insert merge kevs	(4) Templ	ates 🗸

4. Click the Templates drop-down menu

Enter the message body:			
1			
Insert merge keys 🔽		(Templates 🗸
Current Service: Apple Nachrich	ten	Cancel	Send

5. Select the desired template

•••	DayliteMess	ages	
Send message to	: Wanrop Mabeline ((017812345678)	d Apple's a
Enter the message bo	ody:		
			p
Insert merge keys	~		Templates 🔽
			Appointment-Template
			Birthday-Template
Current Service: App	le Nachrichten	Cancel	Save as 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**.

Last name	! Only today you w	ill get 25% off fo
available until 🌑	Iomorrow Short I	Date Format
		Templates
		Tempiates
	Last name available until	Last name ! Only today you w available until Tomorrow Short

6. Send text message by clicking the Send button

	A Wallop Mabeline (V	17812345678)	
Enter the message b	ody:		
Happy Birthday	irst name Last name !	Only today you will get 25% o	ff fo
all our products! Thi	is offer is available until 🔳	omorrow Short Date Forma	t)I
Insert merge keys	~	Templat	es

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

ravonten	Name	a Åederungedeturn	Crátic
Dropbox	Name	 Anderungsdatum 	Grobe
iCloud Drive	Macintosh HD	Heute 12:39	179.36 GB
Box Sync	Netzwerk		
O Downloads			
AirDrop			
Bilder			
Schreibtisch			
Filme			
Programme			
Dokumente			
Anleitungen			
Consta	E Sebastian-B-MacBook Pr	o	

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

🗯 Fin	der Ablage	e Bearbeiten	Darstellung	Gehe zu	Fenster	Hilfe
				Zurück Vorwärts Übergeo	s ordneter Or	೫Ö ೫Ä rdner ℃೫↑
				Alle r	meine Date Imente	eien 企業F 企業O
				O Down	nloads itzerordner	て第L ①第日
				🗎 Libra	ry	
				Com	puter	* 0 #C
				Airbr Airbr	op werk	ት ት አ
				△ iClou	d Drive	☆ 第1
				A Prog	ramme	ΰ₩A
				X Diens	stprogram	me 쇼糕U
				Benutzt	e Ordner	•
				Gehe zu Mit Serv	m Ordner ver verbind	企業G en 業K

4. Navigate to the folder Application Support ->

Name		 Ånderungsdatum 	Größe	Art
•	Accounts	7. Oktober 2014 14:04		Ordner
Þ	Address Book Plug-Ins	4. Juli 2014 09:34		Ordner
Þ.	Application Scripts	12. Mai 2014 15:41		Ordner
	Application Support	Heute 14:18		Ordner
F	Assistant	8. November 2013 16:05		Ordner
Þ.	Assistants	15. Dezember 2012 12:52		Ordner
P .	Audio	15. Dezember 2012 12:52		Ordner
- E	Autosave Information	Gestern 10:14		Ordner
Þ.	Caches	Heute 14:31		Ordner
Þ.	Calendars	22. Oktober 2014 11:05		Ordner
1 H	chat.hipchat.com	3. Dezember 2013 11:38		Ordner
- F	ColorPickers	15. Dezember 2012 12:52		Ordner
Þ	Colors	17. Oktober 2014 00:14		Ordner
Þ.	ColorSync	26. Oktober 2014 11:48		Ordner
F	com.apple.nsurlsessiond	Heute 12:39		Ordner
	Containers	16. Oktober 2014 17:09		Ordner
		Name Accounts Address Book Plug-Ins Application Scripts Application Support Assistant Assistants Audio Audio Caches Calendars ColorPickers ColorSync Containers	Name Adderungsdatum Accounts 7. Oktober 2014 14:04 Address Book Plug-Ins 4. Juli 2014 09:34 Application Scripts 12. Mal 2014 09:34 Application Scripts 12. Mal 2014 15:41 Assistant 8. November 2013 16:05 Assistants 15. Dezember 2012 12:52 Aution 15. Dezember 2012 12:52 Aution Gestern 10:14 Calendars 22. Oktober 2014 11:05 ColorPickers 15. Dezember 2012 12:52 ColorSync 26. Oktober 2014 11:05 ColorSync 26. Oktober 2014 11:48 Cons.apple.nsurlsessiond Heute 12:39 Containers 16. Oktober 2014 17:09	Name ^ Änderungsdatum Größe > Accounts 7. Oktober 2014 14:04 > Address Book Plug-Ins 4. Juli 2014 09:34 > Application Scripts 12. Mal 2014 15:41 > Application Scripts 12. Mal 2014 15:41 > Application Support Heute 14:18 > Assistant 8. November 2013 16:05 > Assistants 15. Dezember 2012 12:52 > Audio 15. Dezember 2012 12:52 > Audosave Information Gestern 10:14 > Calendars 22. Oktober 2014 11:05 > Calendars 22. Oktober 2014 11:05 > Calendars 15. Dezember 2013 11:38 > ColorPickers 15. Dezember 2012 12:52 > ColorSync 26. Oktober 2014 00:14 > ColorSync 26. Oktober 2014 11:48

5. -> com.marketcircle.Daylite4 ->

Favoriten	Name	 Änderungsdatum 	Größe	1
Stopbox	com.apple.QuickLook	30. Oktober 2014 10:13		(
iCloud Drive	com.apple.sbd	23. September 2014 16:54		
	com.apple.spotlight	Heute 14:18		
Box Sync	com.apple.spotlight.Shortcuts	Heute 14:18	44 KB	
Downloads	com.apple.TCC	Heute 14:30		
AirDrop	com.boinx.Mousepose.Mac	26. Oktober 2014 10:28		
	🕨 📄 com.marketcircle.Daylite4	10. Oktober 2014 16:02		
🛅 Bilder	com.zeptolab.cuttheropehd	1. August 2013 11:10		
Schreibtisch	Console	10. Januar 2013 17:15		
Filme	CrashReporter	Heute 12:52		
	Dialectic	12. Juni 2014 15:17		
🔊 Programme	DiskDrill	24. Juli 2013 21:32		
Dokumente	Dock	Gestern 12:08		
	Dropbox	23. September 2014 16:54		
	Dropzone 3	22. Juli 2014 09:09		
0	📓 Macintosh HD 🕨 🔝 Beni 🕨 🏠 bast 🕨	📰 Libr: 🕨 🛅 Application Support 🕨 🛅 com.mar	ketcircle.Daylit	e4

6. -> Plugins

Favoriten	Name	 Änderungsdatum 	Größe	A
Stopbox	Backup	16. Juni 2014 08:42		0
	GeoFind.lic	10. Oktober 2014 16:02	825 Byte	D
	🕨 🛅 Logs	Heute 14:36		C
Box Sync	Plugins	Gestern 08:39		C
Downloads	ProductivityTools.lic	11. August 2014 16:13	787 Byte	D
AirDren	Storage.dlpdb	24. Juli 2014 19:51	6,24 GB	S
W Androp	Templates	16. Juni 2014 08:25		C
i Bilder	Time&Budget	4. September 2014 16:36		C
Schreibtisch	WebConnector.lic	31. August 2014 11:57	769 Byte	C
Filme				
י∕∆; Programme				
Dokumente				
Anleitungen				
Geräte	📓 Macintosh HD 🕨 🔃 Benu 🕨 🏠 basti 🕨 🛅	Libra 🕨 📄 Appil 🕨 📄 com.marketcircle.Da	aylite4 🕨 🛅 Plugi	ins
	1 von 9 ausgewählt, 69,21	GB verfügbar		

7. Delete the file DayliteMessages.daylite-plugin



8. Restart Daylite