FRONTLINESMS
CREDIT

PaymentView User Guide (DRAFT)

October 2011

Welcome to *PaymentView*!

Dear Customer,

Thank you for choosing *PaymentView* to manage your mobile money transactions. *PaymentView* is FrontlineSMS:Credit's software solution to make mobile payments easy for enterprise use. With *PaymentView*, a computer, a GSM-enabled modem, and a mobile signal, any enterprise can track and monitor mobile payments from their customers or clients, analyze trends, and export data into their existing recordkeeping software. With a Sierra Wireless GL6110 modem, available from FrontlineSMS:Credit, users can also use *PaymentView* to send outgoing payments from the convenience of their computer.

PaymentView sits alongside FrontlineSMS, an award-winning SMS communication gateway that makes it simple to organize SMS communication with clients, customers, or members. Using the same setup as *PaymentView*, an organization can send SMS messages to selected groups, manage and respond to queries, and track communication across different audiences.

We are looking forward to working with you as we continue to develop our software. Your thoughts and questions are important to us, so we welcome your feedback as you begin to use our software. To provide feedback, fill the user support request form on our website (credit.frontlinesms.com), under the Contact tab.

Best Regards,

The FrontlineSMS:Credit Team

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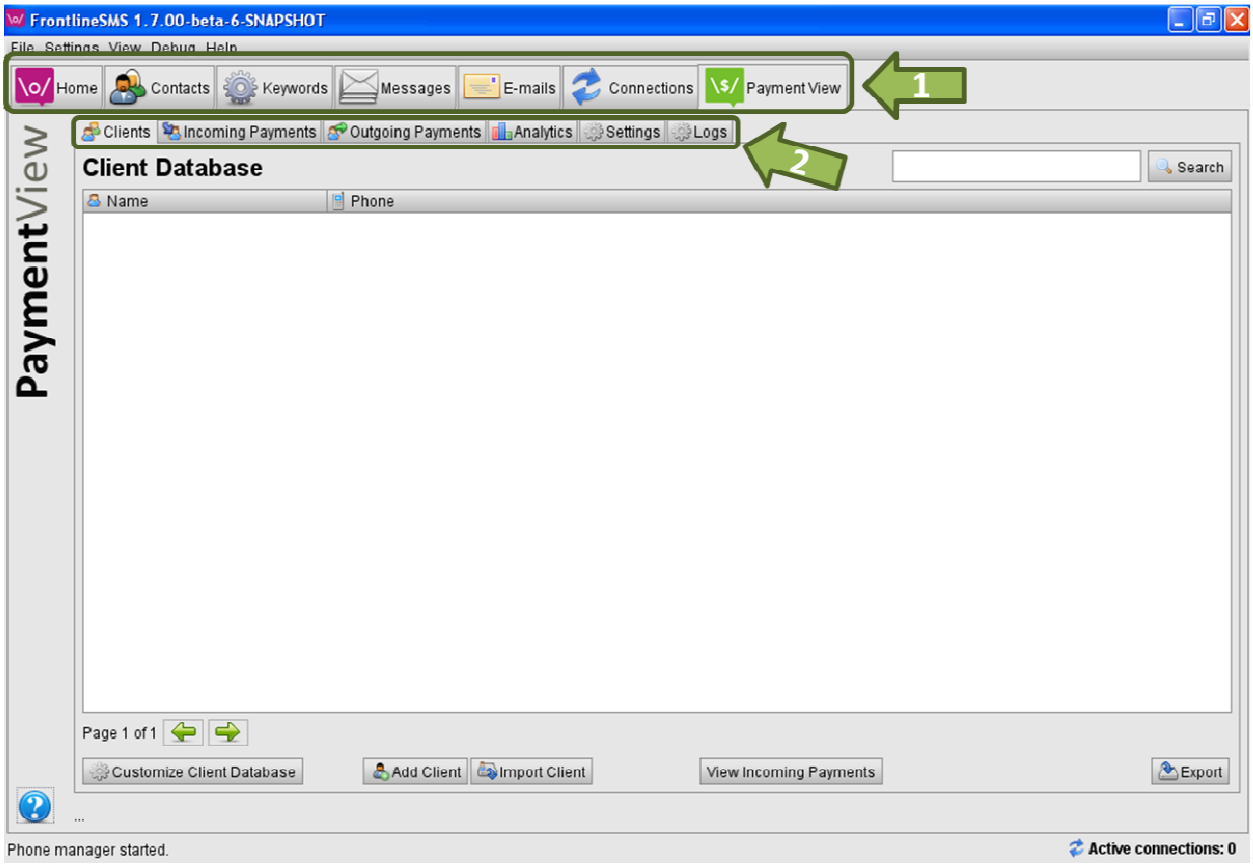
PaymentView adds mobile payment capabilities to the FrontlineSMS 1.7 SMS communication software. This guide focuses primarily on the *PaymentView* functionality and briefly describes the basic uses of FrontlineSMS 1.7.

Software Layout

The FrontlineSMS 1.7 software has a series of tabs (See arrow 1). These tabs include Home, Contacts, Keywords, Messages, E-mails, Connections, and Payment View. The "Payment View" tab controls the mobile payment functionality of the program. If this tab does not appear automatically upon opening the software program, follow these steps.

1. Click "View" on the top left menu bar
2. Check the box next to Payment View

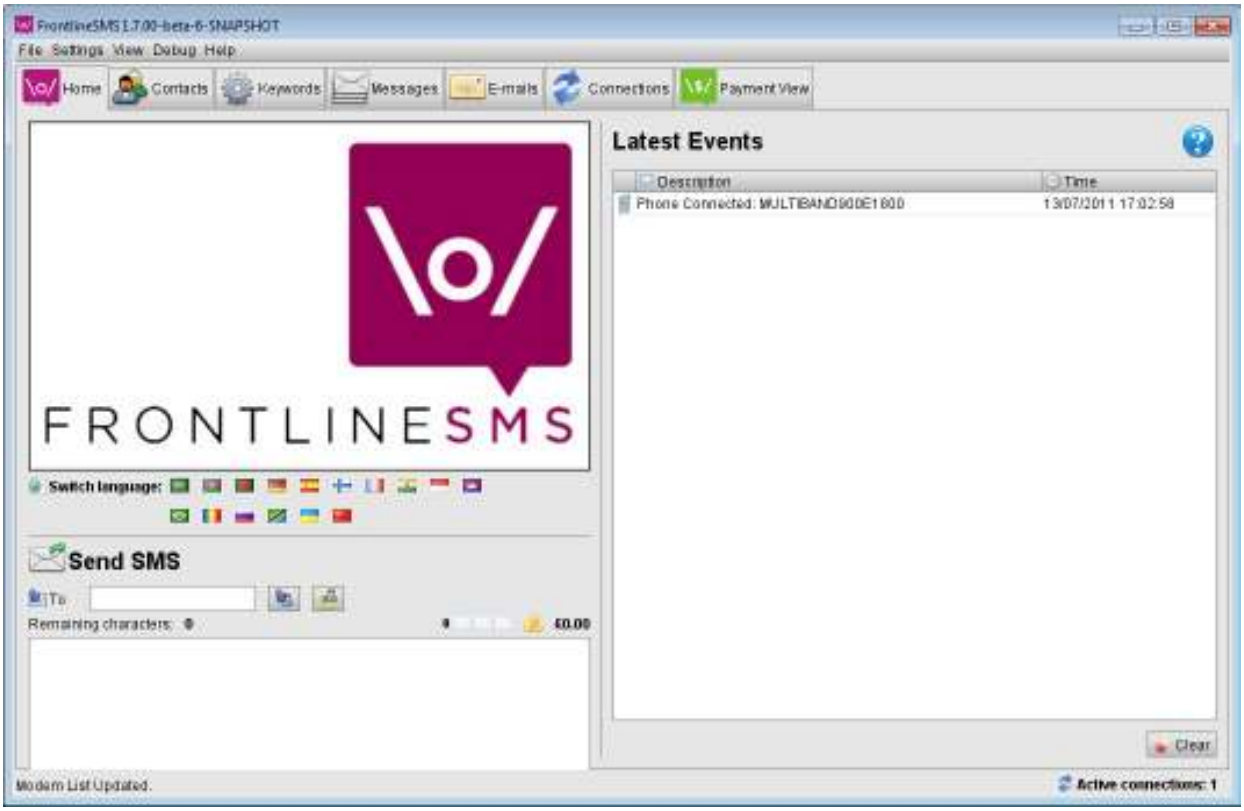
The "Payment View" tab itself also has a series of tabs (See arrow 2). These tabs include Clients, Incoming Payments, Outgoing Payments, Analytics, Settings, and Logs. This user guide will describe each of the *PaymentView* tabs as well as key functions on the Contacts, Messages, and Connections tabs.



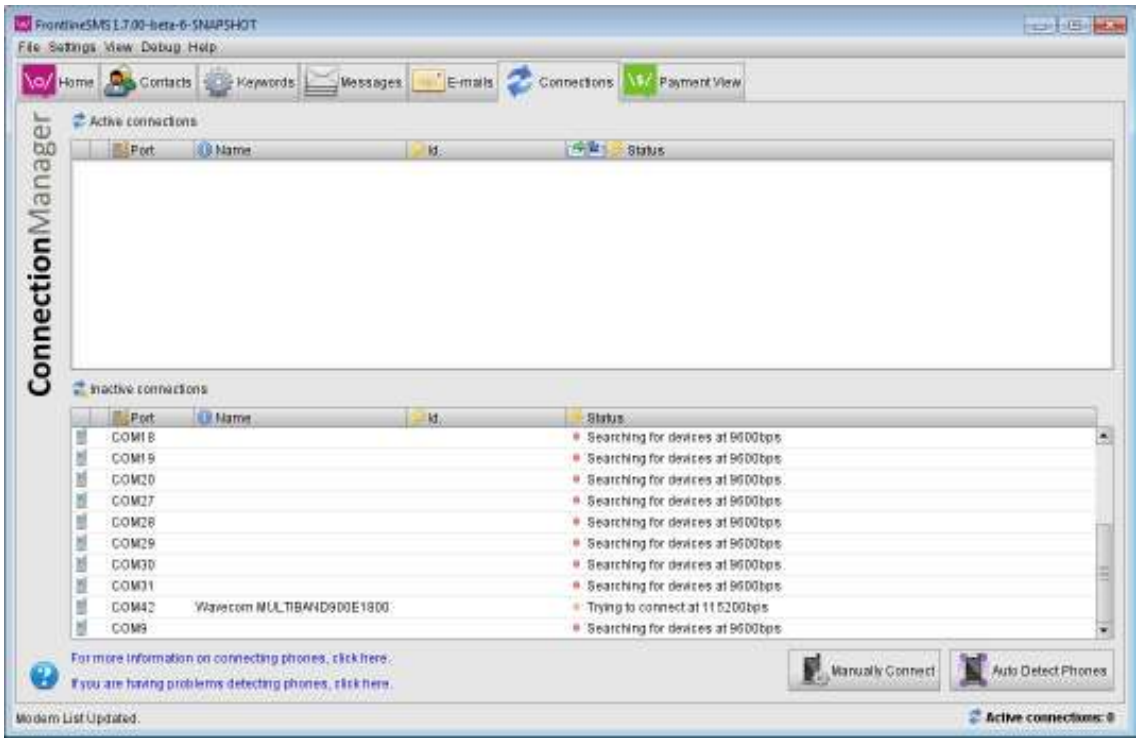
Getting Started

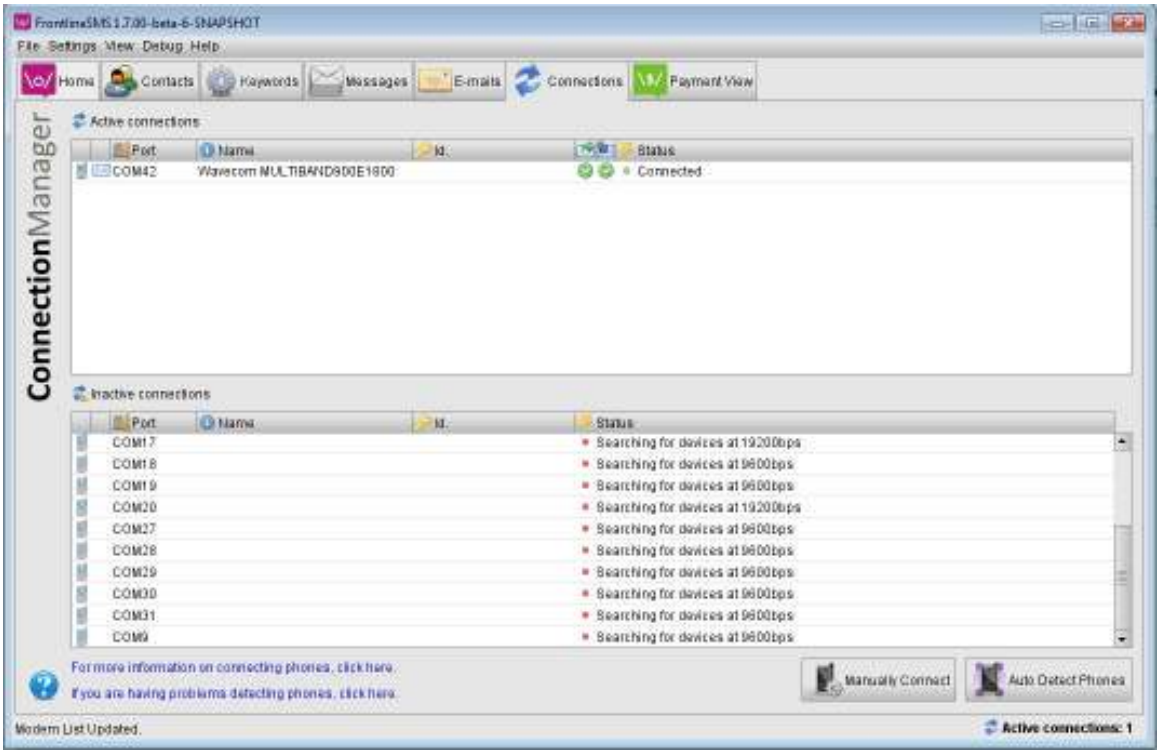
Your installation of PaymentView includes FrontlineSMS 1.7, which provides you with SMS capabilities in addition to mobile payments. This guide will describe how to use PaymentView as well as FrontlineSMS.

1. Before connecting your phone or modem to your computer, disable the SIM PIN on the SIM card that you will be using and delete all sent and received SMS messages.
2. Connect your phone or modem to your computer using a USB cord.
3. Open *PaymentView* by double-clicking on the *PaymentView* icon on your desktop.
4. When the program opens, you will see the FrontlineSMS Home screen. Click on the "Connections" tab.

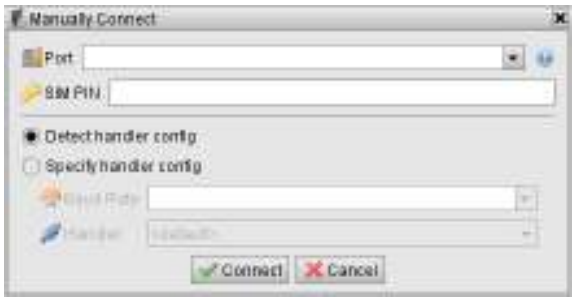


5. You should see your modem name and details on the bottom half of the screen under "Inactive Connections." If it does not appear, click "Auto Detect Phones." It should then appear under inactive connections. Wait for it to connect. Once it connects, you should then see the device appear on the top half of the screen, under "Active Connections."


FrontlineSMS 1.7.00-beta-6-SNAPSHOT
File Settings View Debug Help
Home
Contacts
Keywords
Messages
E-mails
Connections
Payment View
ConnectionManager
Active connections
Port
Name
Id.
Status
Inactive connections
COM18 Searching for devices at 9600bps
COM19 Searching for devices at 9600bps
COM20 Searching for devices at 9600bps
COM27 Searching for devices at 9600bps
COM28 Searching for devices at 9600bps
COM29 Searching for devices at 9600bps
COM30 Searching for devices at 9600bps
COM31 Searching for devices at 9600bps
COM42 Wavecom MULTIBAND900E1800 Trying to connect at 115200bps
COM9 Searching for devices at 9600bps
For more information on connecting phones, click here.
If you are having problems detecting phones, click here.
Manually Connect
Auto Detect Phones
Modem List Updated.
Active connections: 0


FrontlineSMS 1.7.00-beta-6-SNAPSHOT
File Settings View Debug Help
Home
Contacts
Keywords
Messages
E-mails
Connections
Payment View
ConnectionManager
Active connections
Port
Name
Id.
Status
COM42 Wavecom MULTIBAND900E1800 Connected
Inactive connections
COM17 Searching for devices at 19200bps
COM18 Searching for devices at 9600bps
COM19 Searching for devices at 9600bps
COM20 Searching for devices at 19200bps
COM27 Searching for devices at 9600bps
COM28 Searching for devices at 9600bps
COM29 Searching for devices at 9600bps
COM30 Searching for devices at 9600bps
COM31 Searching for devices at 9600bps
COM9 Searching for devices at 9600bps
For more information on connecting phones, click here.
If you are having problems detecting phones, click here.
Manually Connect
Auto Detect Phones
Modem List Updated.
Active connections: 1

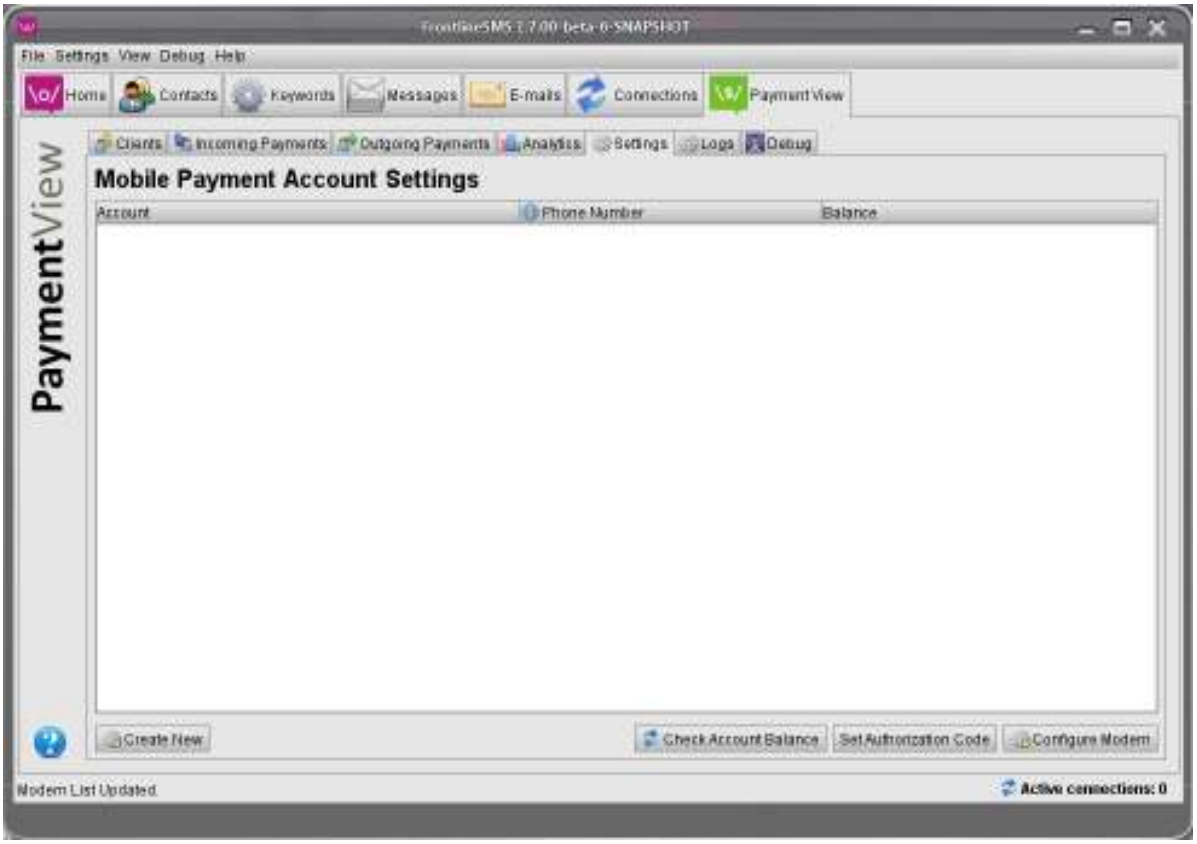
6. If your modem does not automatically connect, click “Manually Connect” at the bottom right, select the port (you will see your modem listed next to one of them) and enter the SIM PIN, then click “Connect.”



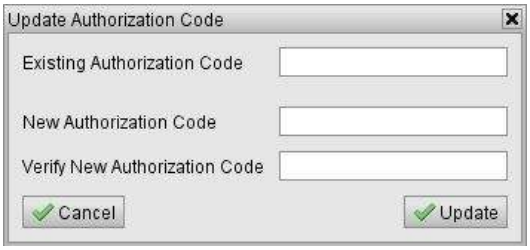
7. After your modem is connected, click the “Payment View” tab.

   NOTE: The remaining steps need only be performed the very first time you use PaymentView.

8. Click the Settings tab to configure *PaymentView*. The Settings tab is where you configure your mobile money service, set or change your authorization code, and check your mobile money account balance. *PaymentView* tracks your account balance internally, but if you would like to do check your account balance, use the “Check Account Balance” button. NOTE: Some mobile money providers charge a fee for a balance check.



9. Click the “Set Authorization Code” button at the bottom right.



10. Enter “password” in the “Existing Authorization Code” text box.

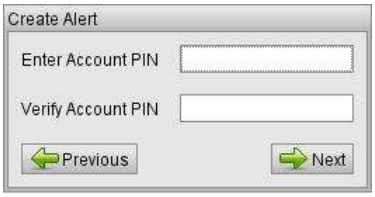
    NOTE: The Authorization Code is a password to prevent the unauthorized sending of payments from your mobile money account. You should choose a password that is secret and difficult to guess. Only appropriate officials in your organization should know this password.

11. Enter your desired new password in the “New Authorization Code” text box and then enter it again in the “Verify New Authorization Code” text box. Click “Update.”

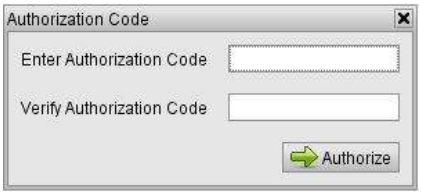
12. Next, on the “Settings” tab, click the “Create New” button at the bottom and the following dialog box will appear:

13. Using the “Select Device” drop-down, select your modem, which should appear in the drop-down list.
14. Using the “Select Mobile Payment Service” drop-down, select the desired mobile payment service.

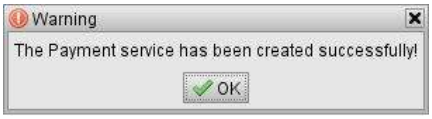
15. Click “Next.”
16. Another dialog box will appear requesting the Account PIN. In the “Enter Account PIN” text box, enter the PIN for the mobile money account — **not the SIM PIN associated with the SIM card in your modem**. Re-enter this PIN in the “Verify Account PIN” text box. Click “Next.”



17. Enter the authorization code you previously created in the “Enter Authorization Code” text and “Verify Authorization Code” text boxes. Click “Authorize.”

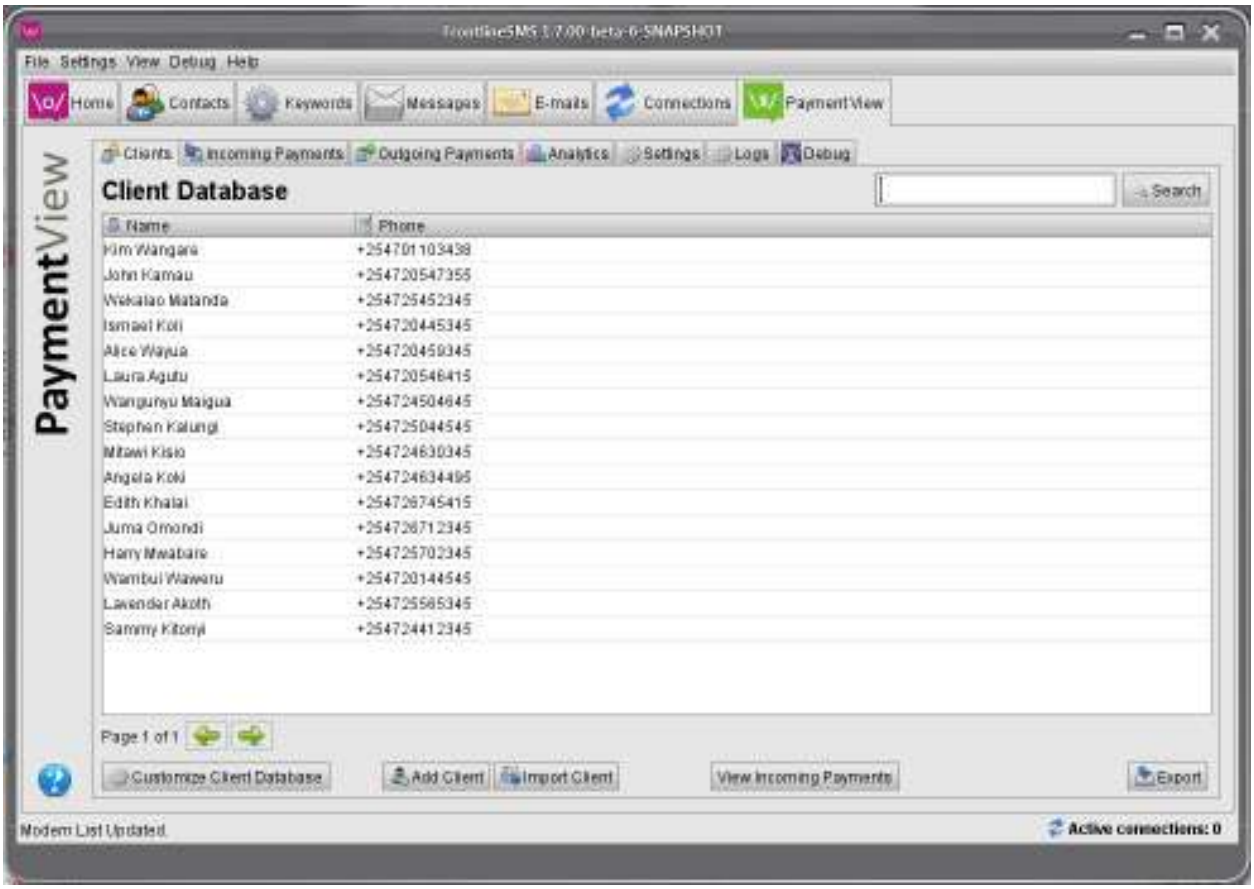


18. A dialog box will inform you that the payment service has been created successfully. Click “OK.” You are now ready to send and receive mobile payments!



Clients Tab

The “Clients” tab, under the main “Payment View” tab, allows you to manage a database of people with whom you can send and receive payments. This tab displays all of the clients listed in your database at a given time. The default fields included in the database are Name, Phone, and Account(s), but new fields can be added to customize the database to your needs. Use the arrows at the bottom left of the tab to navigate to different pages of the Client Database. In order to send a payment to a client, that client must first be added to your database. However, if you receive a payment from a client not already listed in the Client Database, *PaymentView* will automatically create a new client record for that phone number. The name listed will be the name sent with the mobile payment.



Customizing Your Database

Adding a Field

1. On the “Clients” tab, click the “Customize Client Database” button. The “Client Details” dialog box will appear with the four default fields: “First Name,” “Other Name,” “Phone Number,” and “Active.” From this window, you may add or remove fields and edit existing default fields.
2. To add a field, click the “Add Field” button in the “Client Details” dialog box.

3. A new dialog box will appear, prompting you to enter a new name for a field. Enter the field name you want, such as “Lending Group” or “Address,” and click “create.”

4. A dialog box will appear informing you that you have successfully created a new field. Click “OK.” The new field will appear under “Custom Fields” with the field number and the name you designated.

5. To add additional fields, repeat steps 2-4 until you have added all desired fields. Then click “Close” on the “Client Details” dialog box to return to the Client Database.

Removing a Field

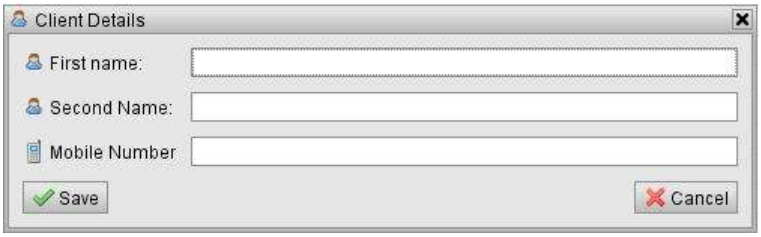
6. You can remove fields that may have been entered incorrectly or are no longer necessary. To remove a field, click the "Customize Client Database" button on the "Clients" tab.
7. In the "Client Details" dialog box that appears, select the field you wish to remove.

   NOTE: The default fields cannot be removed.

8. Next, click "Remove Field." The field title should disappear from the list. To exit the window, click "Close."

Adding a Client

1. On the "Clients" tab, click the "Add Client" button. A "Client Details" dialog box will appear with text boxes for each of the default fields, as well as any custom fields that may have been created.

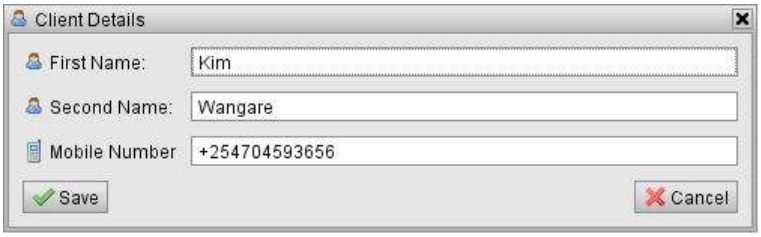


2. Enter the First Name, Second Name, Mobile Number, and any other information necessary for your Client Database. Name(s) and Mobile Number are required, other fields are optional. Enter the phone number in the following format: +254XXXXXXXXX.
3. Click "Save." The new client should now appear in your Client Database and your Contact List.

Managing Your Database

Editing a Client's Information

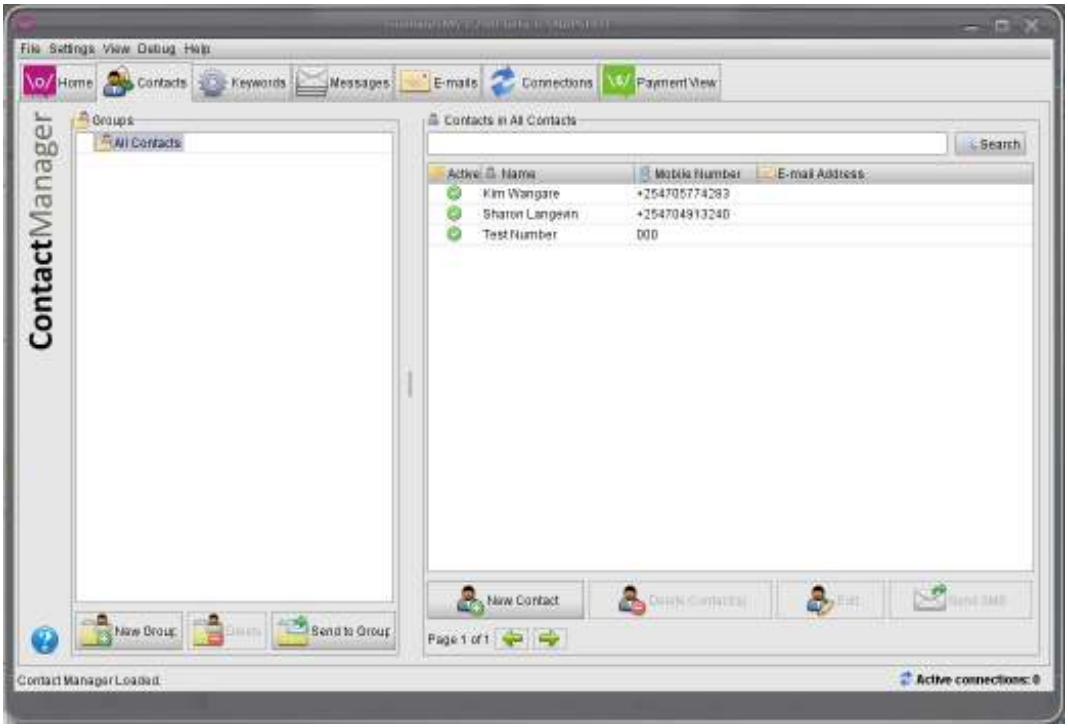
1. Highlight the client you wish to edit by clicking once on the name.
2. Right-click on the highlighted name and select "View Client."



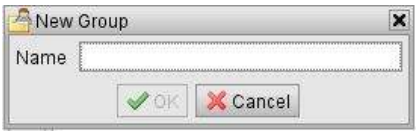
3. Edit the fields you wish to change – First Name, Second Name, Mobile Number, etc.
4. Click "Save."
5. If you have viewed the incorrect client, simply click "Cancel" to return to the previous screen.

Adding a Client to a Contact Group for Messaging

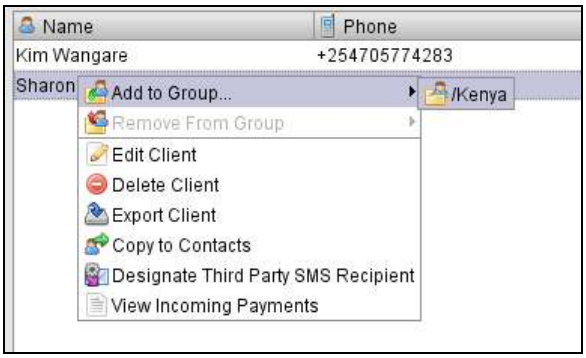
1. Any client that is in your Client Database can be added to a contact group for easy messaging. Go to the main "Contacts" tab.



2. To create a new contact group, click the “New Group” button at the bottom left.
3. A dialog box will appear. Type the name of the group and click “OK.”

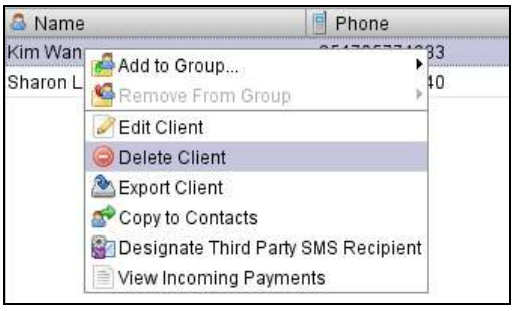


4. Go to the “Payment View” tab, then the Client Database tab.
5. Right-click the client that you wish to add to the contact group and select “Add to Group.” Select the group you wish to add the client to. The client will now be in a contact group. To send a message to a contact group, return to the “Messages” tab.

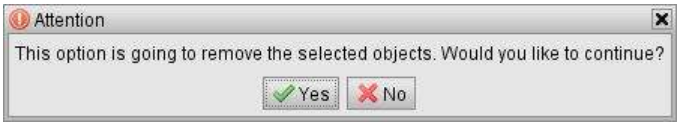


Deleting a Client

1. On the “Clients” tab, highlight the client you wish to remove by clicking on the name.
2. Right-click on the highlighted name and select “Delete Client.”



3. A dialog box will ask you if you really wish to delete that client. If so, select “Yes.”



4. A second dialog box will inform you that you have successfully deleted the client.

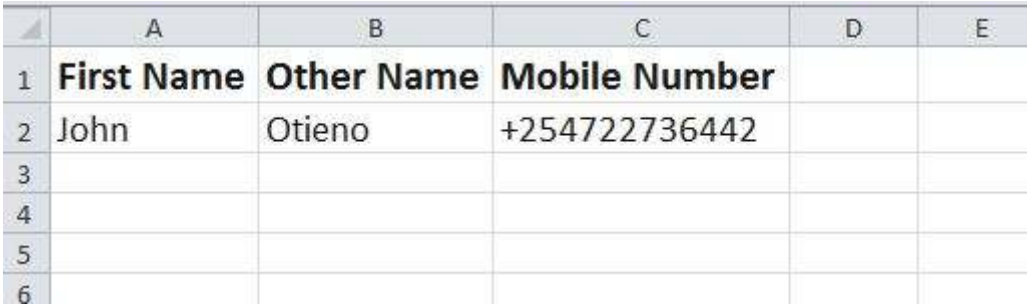
5. Click “OK.”

Searching Your Database

1. To find a specific client by name, you can search by using the search bar at the top right. Simply type the full or partial name, such as “Kim” for “Kimberly” or “Dav” for “David,” that you are looking for, and click “Search.” The results will appear in the Client Database window. To clear a search, delete all text from the search bar and click “Search” again.

Importing Clients

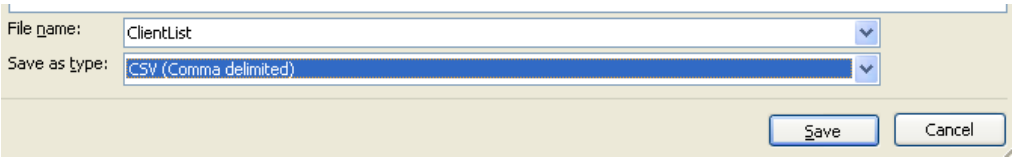
1. To import a client, or group of clients, you must first create a .csv file that contains the Names, Mobile Numbers, and any other necessary information. To create a .csv file, open Excel and create a new spreadsheet.
2. The first row in your spreadsheet should include the names for each data column. These column names should correspond to the Client Details fields in the “Customize Client Database” window (see example below). In addition, add columns for any custom fields you have added. In order for your import to work, **the column headings must exactly match the spelling, capitalization and spacing of these Client Details fields**.



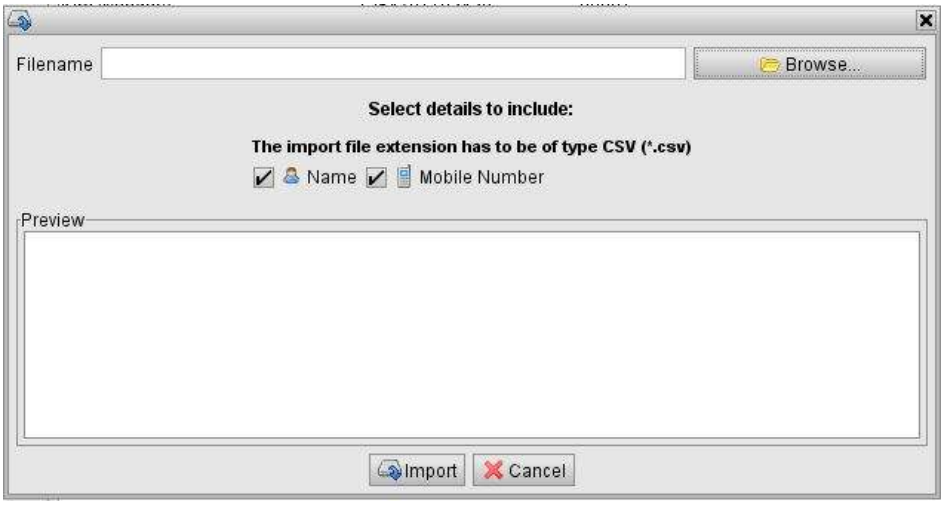
	A	B	C	D	E
1	**First Name**	**Other Name**	**Mobile Number**		
2	John	Otieno	+254722736442		
3					
4					
5					
6					

3. Enter the relevant information for each client you would like to add.

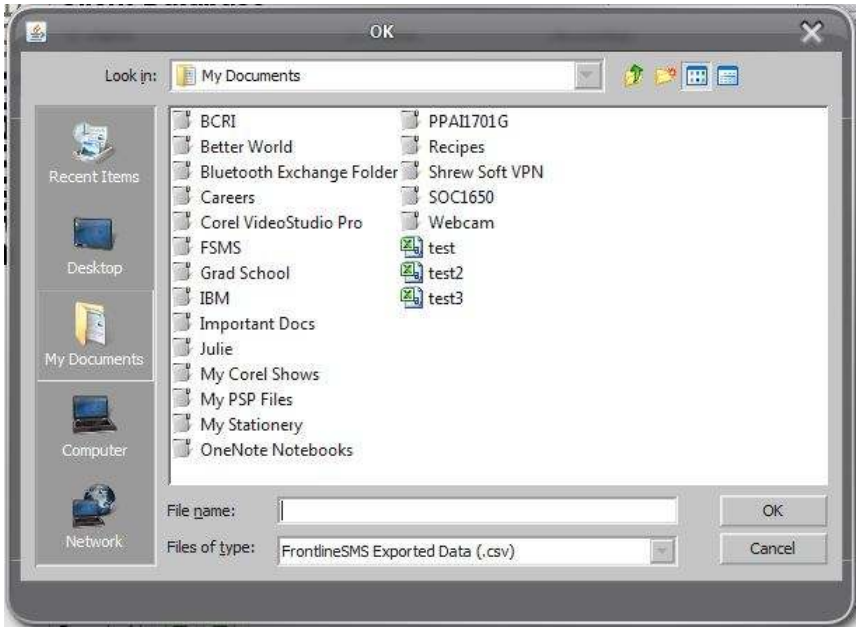
4. Once you have completed the spreadsheet, go to File>Save As. Type in the desired File Name and use the drop-down underneath to select the .csv format.



5. Once your .csv file is complete, go to the "Clients" tab and click "Import Client."

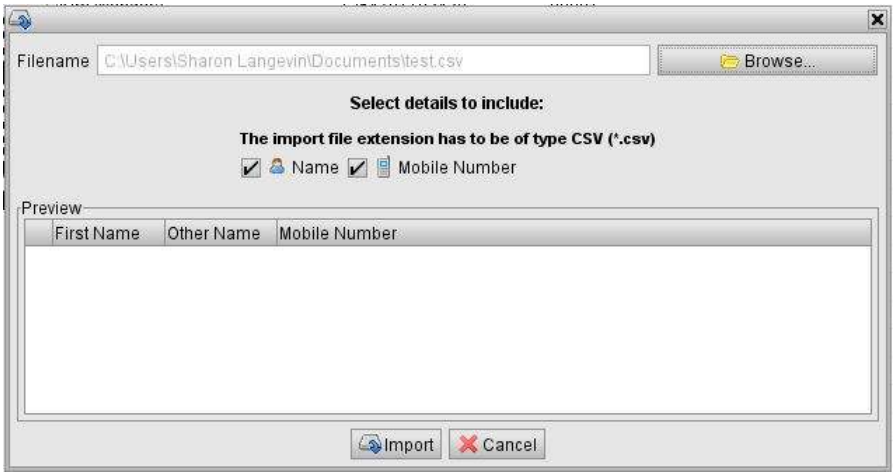


6. A dialog box will appear. Click "Browse…" to find the location of the .csv file that you have created and select the appropriate file for import. Click "OK."



7. The File name of the selected file should appear on the top line and a preview of the information to be imported should appear at the bottom. If you wish to import only certain columns of information, use the check boxes in the middle to select and deselect each column.

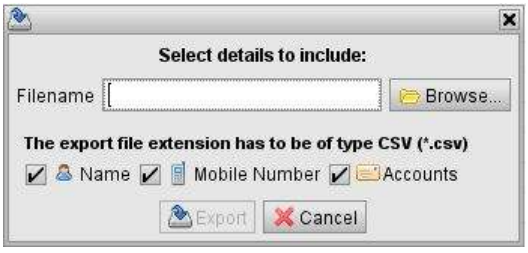
   NOTE: "Name" is one checkbox, but it corresponds to both the "First Name" and "Other Name" columns.



8. When you have finished customizing your import, click "Import."
9. If the import is successful, a dialog box will pop up to confirm. Click "OK." The information you just imported should appear in your Client Database.

Exporting Clients

1. To export a client, or group of clients, highlight the client or set of clients that you would like to export. Use the Shift or Ctrl buttons to highlight multiple names at the same time. You can also use the search bar to find a specific client or group of clients for export.
2. Once you have selected the appropriate group of names, click "Export" in the bottom right of the screen.



3. A dialog box will appear, asking for a File name. Click “Browse…” and a new dialog box will appear.

4. Navigate to the location where you like to save the exported data as a new “csv” file. Type the desired File name into the text box. In this example we have typed “test”.
5. Click “OK.” The file path and name should now appear in the “File name” text box.

6. Select the information that you would like to export, corresponding to the columns in your Client Database. Once you have selected the appropriate columns, click “Export.”

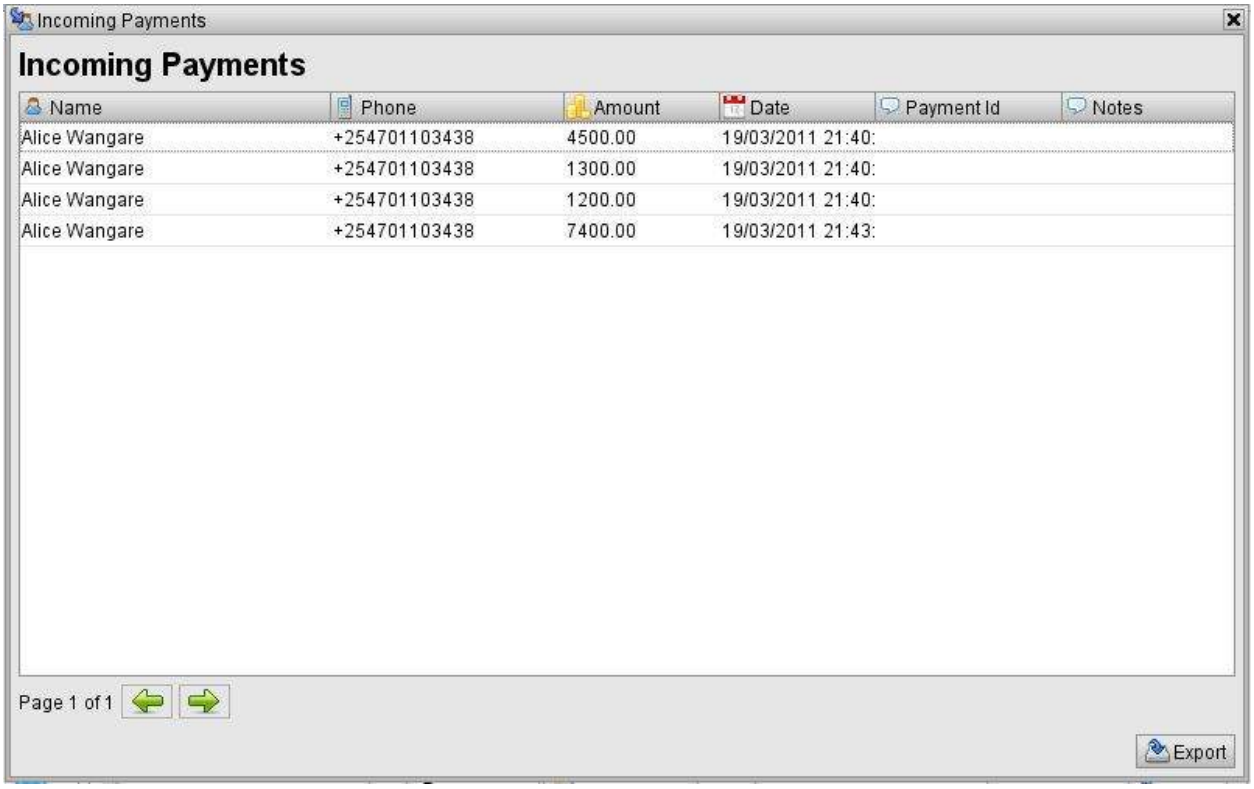
7. Once the export is complete, a dialog box will appear telling you that it was successful. In addition, a .csv file of the name you chose will appear in the folder that you selected. To view the file, simply open it using Microsoft Excel or another program that reads .csv files.

Viewing a Client's Payment History

1. To view the history of incoming payments for an individual client, simply highlight the client and click "View Incoming Payments" at the bottom of the screen. To view the history of incoming payments for a group of clients, either highlight the group of clients or use the search bar to search for the group you are interested in. Then click "View Incoming Payments."

   NOTE: To de-select a client, hold the Ctrl button and click on the client.

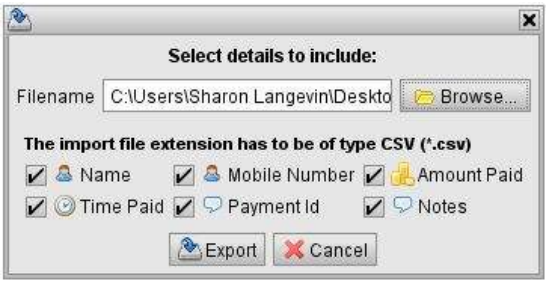
2. A new window will appear, with a list of that client's payment history. In this example, we have selected Alice Wangare.



3. To export the list of incoming payments, click "Export."

4. A dialog box will appear, asking you to choose a file name.

5. Navigate to the location where you like to save the exported data as a new "csv" file. Type the desired File name into the text box. In this example we have typed "test".
6. Click "OK." The file path and name should now appear in the "File name" text box.

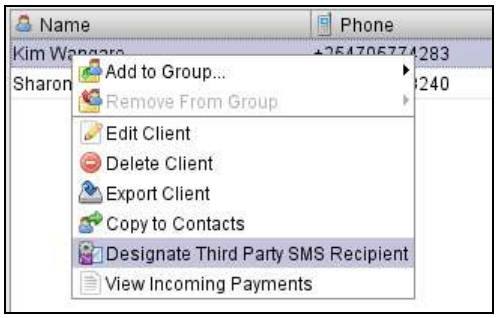


7. Select the information that you would like to export, corresponding to the information stored about each incoming payment. Once you have selected the appropriate columns, click "Export."

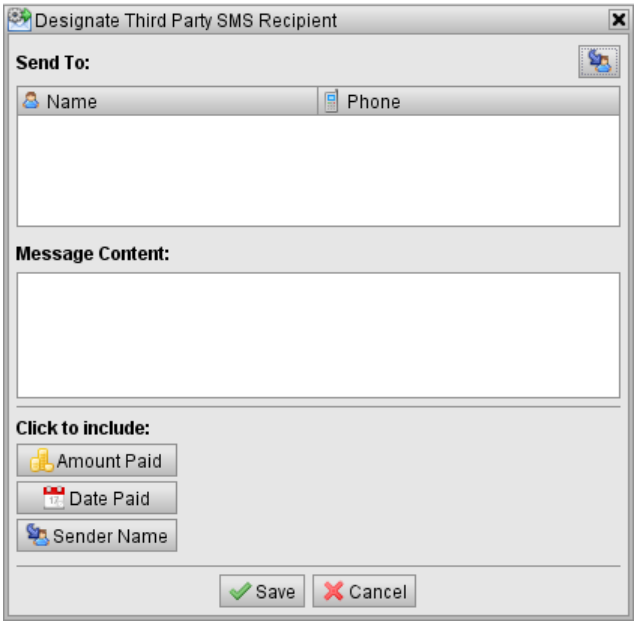
8. Once the export is complete, a dialog box will appear telling you that it was successful. In addition, a .csv file of the name you chose will appear in the folder that you selected. To view the file, simply open it using Microsoft Excel or another program that reads .csv files.

Setting up a Third-Party Notification

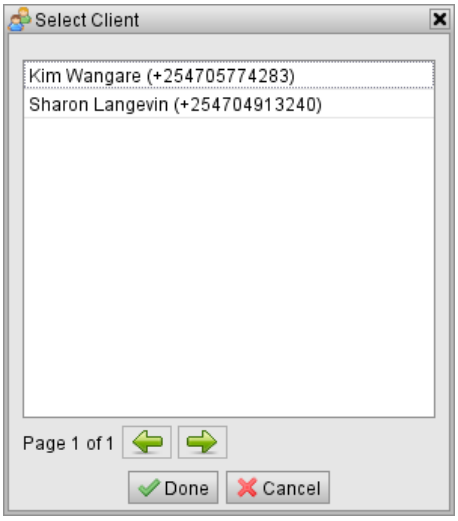
1. If you wish to notify a staff member or other third party that a payment from a particular client has arrived, use the third-party notification setup on the “Client” tab.
2. To set up a third-party notification for a client, right-click the client’s name and select “Designate Third Party SMS Recipient.”



3. A dialog box will appear that allows you to compose a custom notification message. If desired, you can include the amount paid, date paid, and client name. This dialog box also requires you to select a recipient for the notification. For example, you might want to notify a loan officer each time one of his clients makes a repayment.



4. To add a recipient, click the small button at the top right of the dialog box. A new dialog box will appear that allows you to add a recipient from your client database. Select the appropriate recipient for the notification and click "Done."

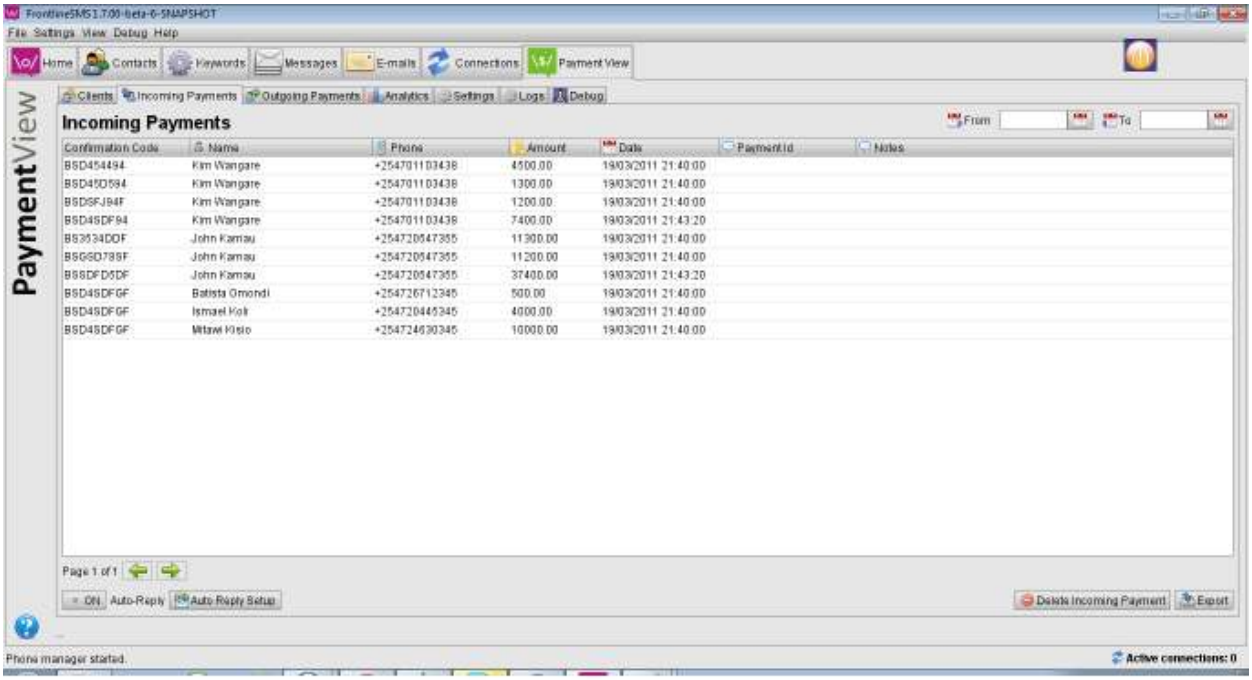


5. Next, type in the message that you wish to send to the third-party recipient. For example, we are setting up a notification so that when Sharon Langevin pays, Kim Wangare will receive a notification that tells her when Sharon has paid and how much. To include the name of the client who has paid, click the "Sender Name" button at the bottom, to include the payment amount, click the "Amount Paid" button, and to include the date of payment, click "Date Paid." These buttons will pull payment information from your records and include it in the message. When you have finished composing your message, click "Save."

Incoming Payments Tab

The “Incoming Payments” tab allows you to view and manage all payments from your clients. This tab also enables you to export a list of payments to a .csv file. If you have multiple pages of incoming payments, simply use the arrows at the bottom left to navigate between pages.

The default view shows the Name, Mobile Number, Account Number, Amount, and Date/Time of the payment. The “Incoming Payments” tab also allows you to set up an Auto-Reply so that your clients will receive an SMS when they make a payment.



Setting up an Auto-Reply

1. All of your clients will receive a confirmation SMS from their mobile money provider when they make a payment. However, you can also send a receipt or confirmation SMS from your organization by clicking the "Auto Reply Setup" button at the bottom left.
2. A dialog box will appear that allows you to compose a custom SMS to be sent to all clients when they make a payment. You can include data such as the amount or date of the payment, as well as other information based on the client's savings target, such as how much more they need to pay by a certain date (if you have set up a savings target for a client).

3. Once you have finished composing your message, click "Save" and you will return to the "Incoming Payments" tab.
4. Click the On/Off switch at the bottom left to enable Auto-Reply. You must enable Auto-Reply for the SMS to be sent. The system will remind you that sending SMS messages will cause the SIM card's airtime account to be charged at the mobile network's standard rate. Click "Yes" if you agree to pay.

NOTE: To notify a third party that a certain client has paid, go to the "Client" Tab.

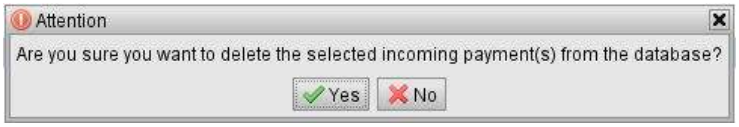
Searching Payments by Date

1. If you wish to view payments from a particular day, week, or month, simply enter the date or dates you are interested in at the top right corner.

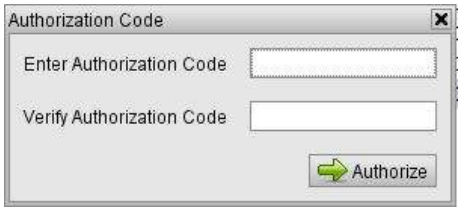
2. Select the start date by entering a date into the left box or clicking the calendar icon and then clicking on the date.
3. Select the end date by entering a date into the right box or clicking the calendar icon and then clicking on the date.

Deleting an Incoming Payment

1. If a payment was received in error and needs to be reversed, it can be deleted from the list of incoming payments. Once a payment is deleted, your mobile money account balance will be updated internally. However, you must also contact your mobile money provider to manually reverse the actual payment. All payment deletions will be recorded in the "Logs" tab.
2. To delete a payment, highlight the payment you wish to delete and click "Delete Incoming Payment."



3. A dialog box will ask you to confirm that you would like to delete the payment. To delete the payment, click "Yes."



4. A new dialog box will ask you to enter your authorization code. This is to ensure that no payments will be deleted fraudulently. Enter your authorization code and click "Authorize."

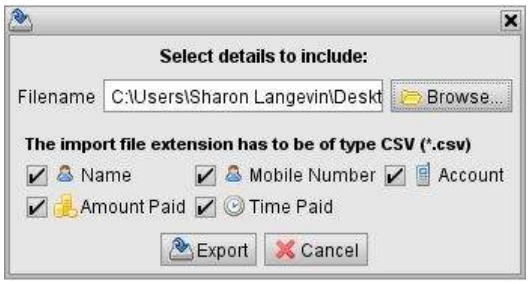
5. A dialog box will then inform you that you have successfully deleted the incoming payment. Click "OK." A new message will be displayed on the "Logs" tab, describing the payment that was deleted.

Exporting Payments

1. To export a list of all incoming payments, click “Export.”

2. A dialog box will appear, asking for a File name. Click “Browse…” and a new dialog box will appear.

3. Navigate to the folder where you would like to save the exported Incoming Payment data and type the desired File name in the box.
4. Click “OK.” The file path and name should now appear in the “File name” text box.



5. Select the information you would like to export from the checkboxes, which correspond to the columns on the “Incoming Payments” tab. Once you have selected the columns you want, click “Export.”

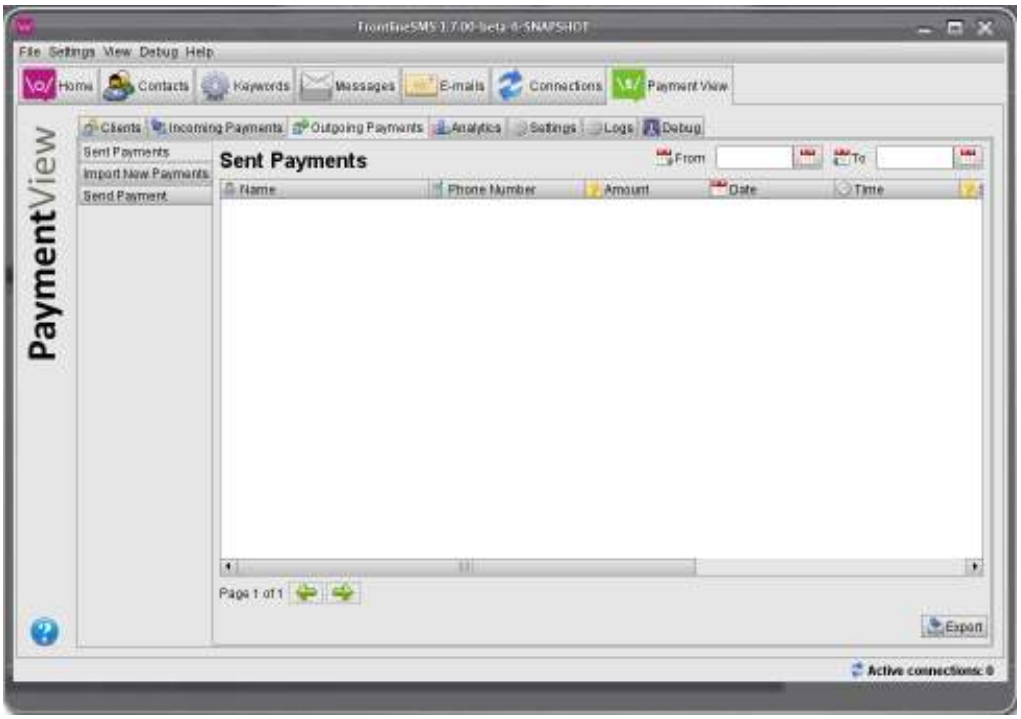
6. Once the export is complete, a dialog box will appear telling you it was successful. In addition, a .csv file of the name you chose will appear in the folder that you selected. To view the file, simply open it using Excel or another program that reads .csv files.

Outgoing Payments Tab

The "Outgoing Payments" tab allows you to send and manage all outgoing payments. The default view will show a list of all payments sent from your system. All sent payments are saved permanently – they will never be deleted from this view. You can navigate through multiple pages of sent payments using the arrows at the bottom left.

The default view of sent payments in the tab displays the following information:

- "Name": Client name as it appears consistently throughout *PaymentView*.
- "Mobile Number": Client mobile number as it appears throughout *PaymentView.*
- "Amount": Amount, in Kenyan shillings, of payment sent.
- "Date/Time": Date and time that payment was sent.
- "Status": Indicates whether the payment was successfully sent or if there was an error.
- "Confirmation Code": The unique confirmation code generated by the mobile payments service (e.g. M-PESA, Airtel Money, etc.) and recorded by *PaymentView*.
- "Payment ID": A numerical code of up to 20 digits, input by the user to allow integration with existing record-keeping systems. The ID can be a cost code or unique code per user.
- "Notes": Entered by the user to record payment characteristics as needed.



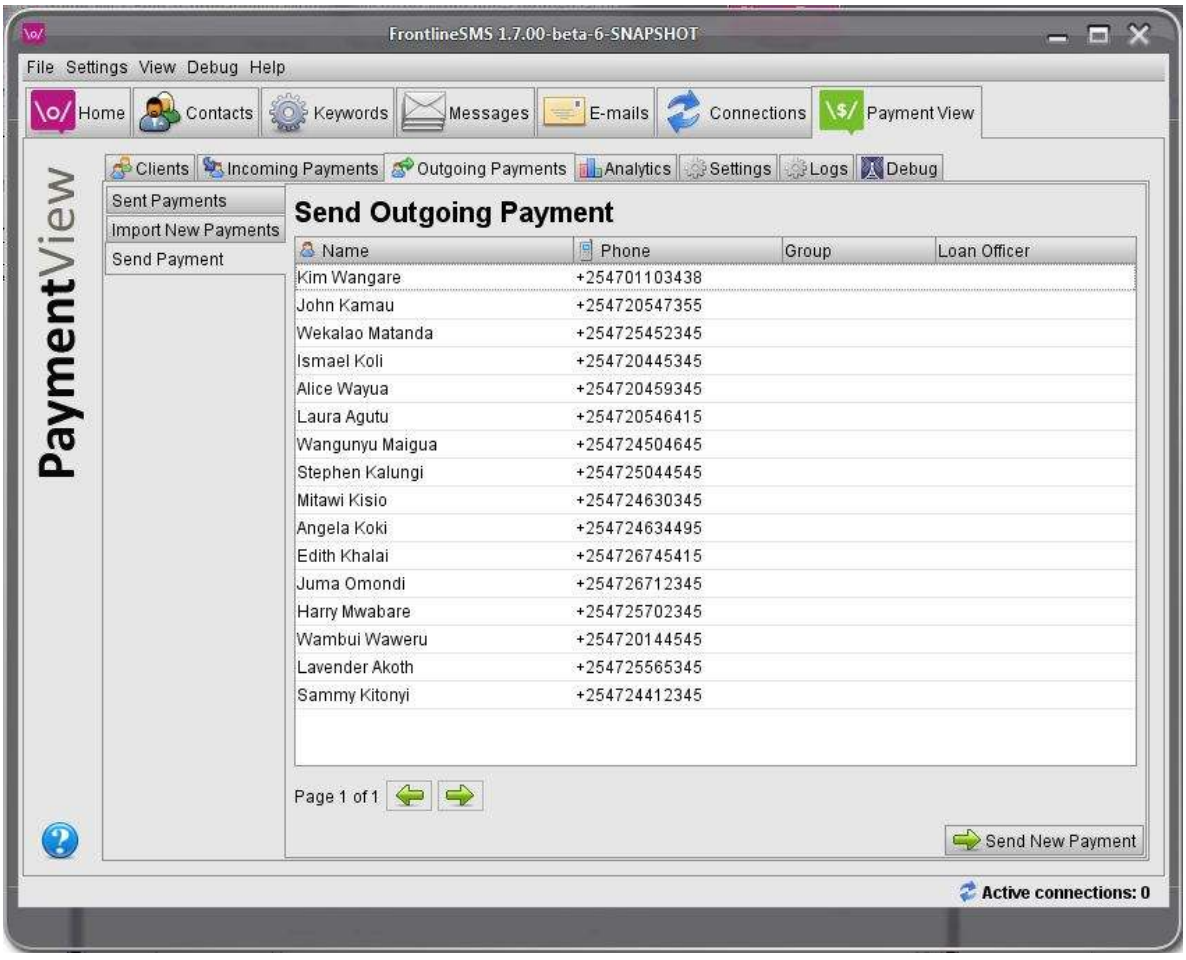
Searching Payments by Date

1. If you wish to view payments from a particular day, week, or month, simply enter the date or dates you are interested in at the top right corner.

2. Select the start date by entering a date into the left box or clicking the calendar icon and then clicking on the date.
3. Select the end date by entering a date into the right box or clicking the calendar icon and then clicking on the date.

Sending an Individual Payment

1. Click “Send Payment” from the left sidebar.
2. Select the client to whom you wish to send a payment.

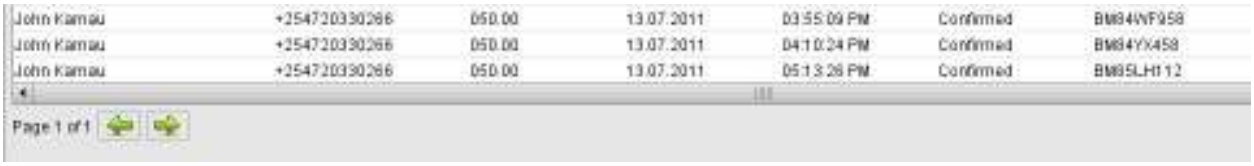


3. Click “Send New Payment” at the bottom right of the screen. A dialog box will appear with the Name and Mobile Number of the person you have selected. Enter the amount that you would like to send.

4. Select the mobile money service you would like to use from the drop-down menu.
5. Add a Payment ID if desired. Record any Notes regarding the payment.
6. Click “Send Payment Now.”
7. A new dialog box will appear, asking you to type in your Authorization Code to authorize the payment. Type the code and click “Authorize.”

8. The system will now take up to a minute to send the payment. Once the payment has been sent, a dialog box will appear, informing you that the payment has been successful. If the payment fails, a dialog box will inform you that the payment was not successful.

9. Navigate to the “Sent Payments” tab to see the record of your new payment. Its status should say “Confirmed.” If the status is “Created” or “Unconfirmed,” then the payment has not yet gone through. Please wait for the payment to continue processing. If the status is “Error,” the payment did not go through. Please resend the payment.



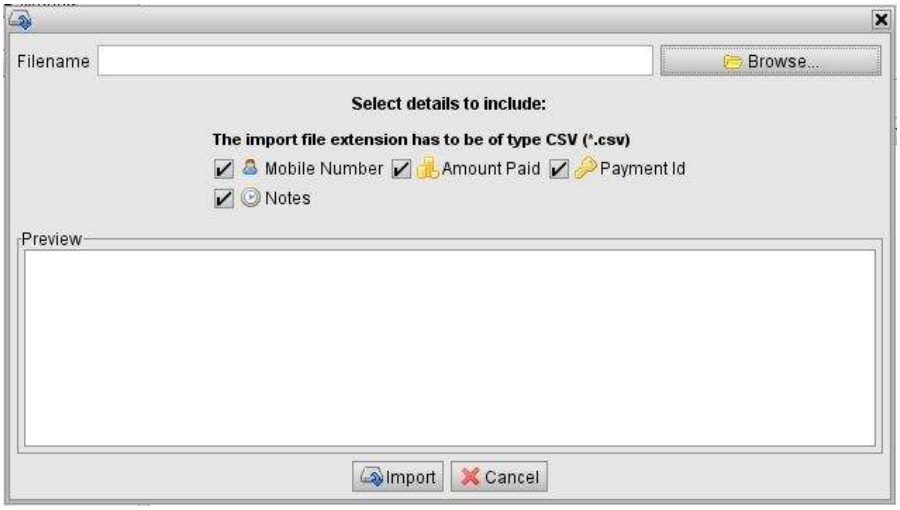
Sending Multiple/Bulk Payments

1. To send a list of many payments, first create a .csv file (using Excel) with the list of mobile numbers and payment amounts. Your file should look similar to this example:

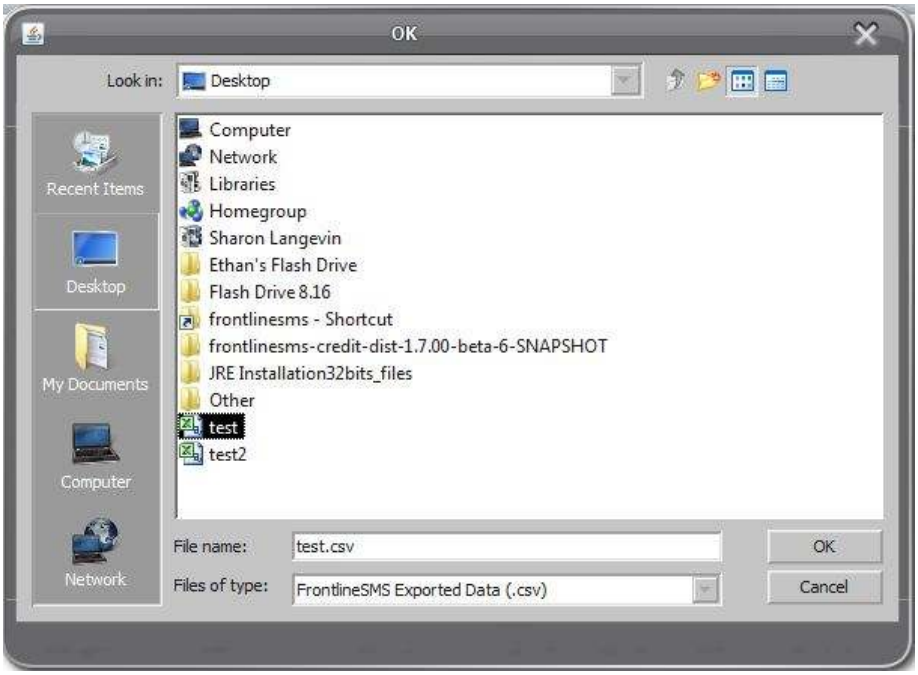
	A	B	C	D
1	**Mobile Number**	**Amount Paid**	**Payment ID**	**Notes**
2	+254723443978	500		
3	+254727663458	250		
4	+254701103438	100		

2. On the “Outgoing Payments” tab, click “Import New Payments” from the left sidebar.

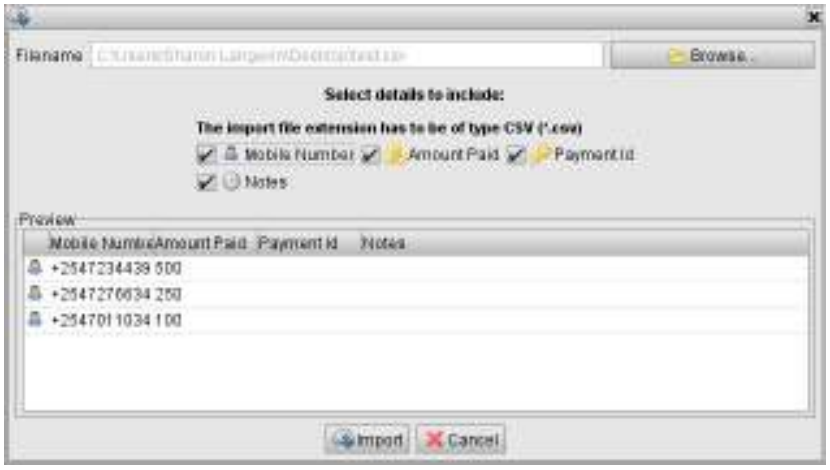
3. A dialog box will appear. Click “Browse.”



4. Navigate to the folder where you have saved your .csv file of payments, select the file, and click “OK.”

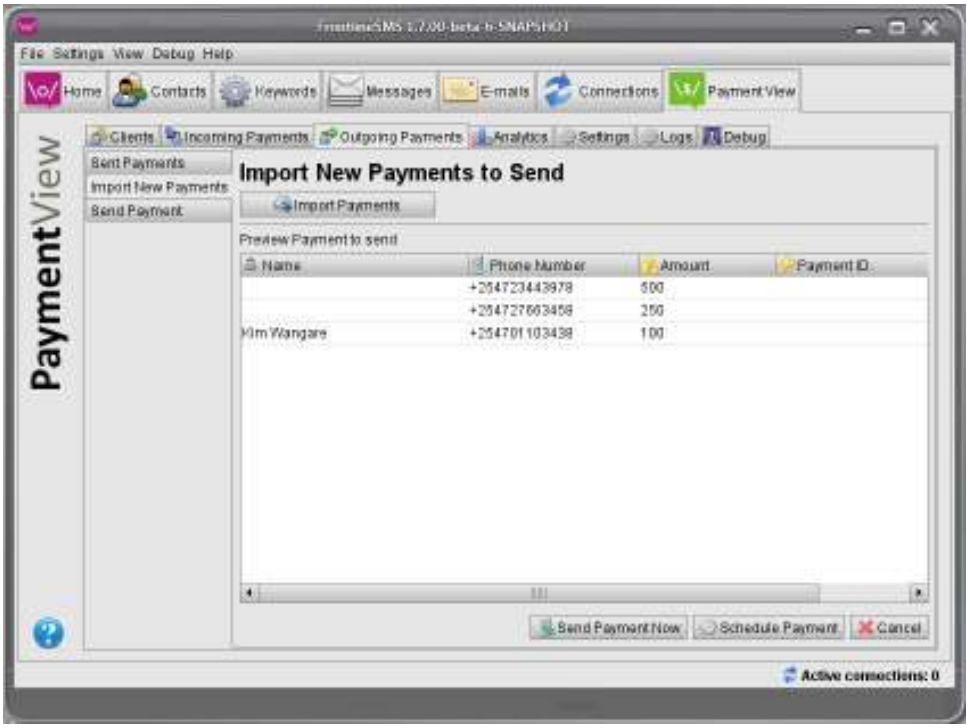


5. You will then see a preview of the information to be imported. Review the payments and click "Import."

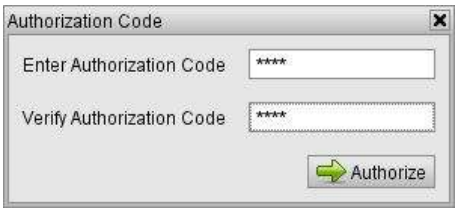


6. A dialog box will appear, informing you that the import was successful. Click "OK."

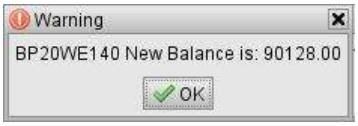
7. If you import a payment to be sent to someone in your client database, their name will automatically appear in the "Name" column. If not, no name will appear. Review your payments again to make sure they are correct. If there are errors, click "Cancel," edit your .csv file, and import it again.



8. If everything is correct, click “Send Payment Now.” A dialog box will appear, asking for your Authorization Code. Enter the code and click “Authorize.”



9. Once the payments have sent successfully, a dialog box will appear with your updated balance. Click “OK.”



10. Another dialog box will appear, informing you whether the payments were sent successfully and if any errors have occurred. If all payments were sent successfully with no errors, click “OK.”

11. To view your sent payments, click “Sent Payments” on the left sidebar.

Exporting Sent Payments

1. To export a list of all sent payments, click “Sent Payments” on the left sidebar. Then click “Export.”

2. A dialog box will appear, asking for a File name. Click “Browse…” and a new dialog box will appear.

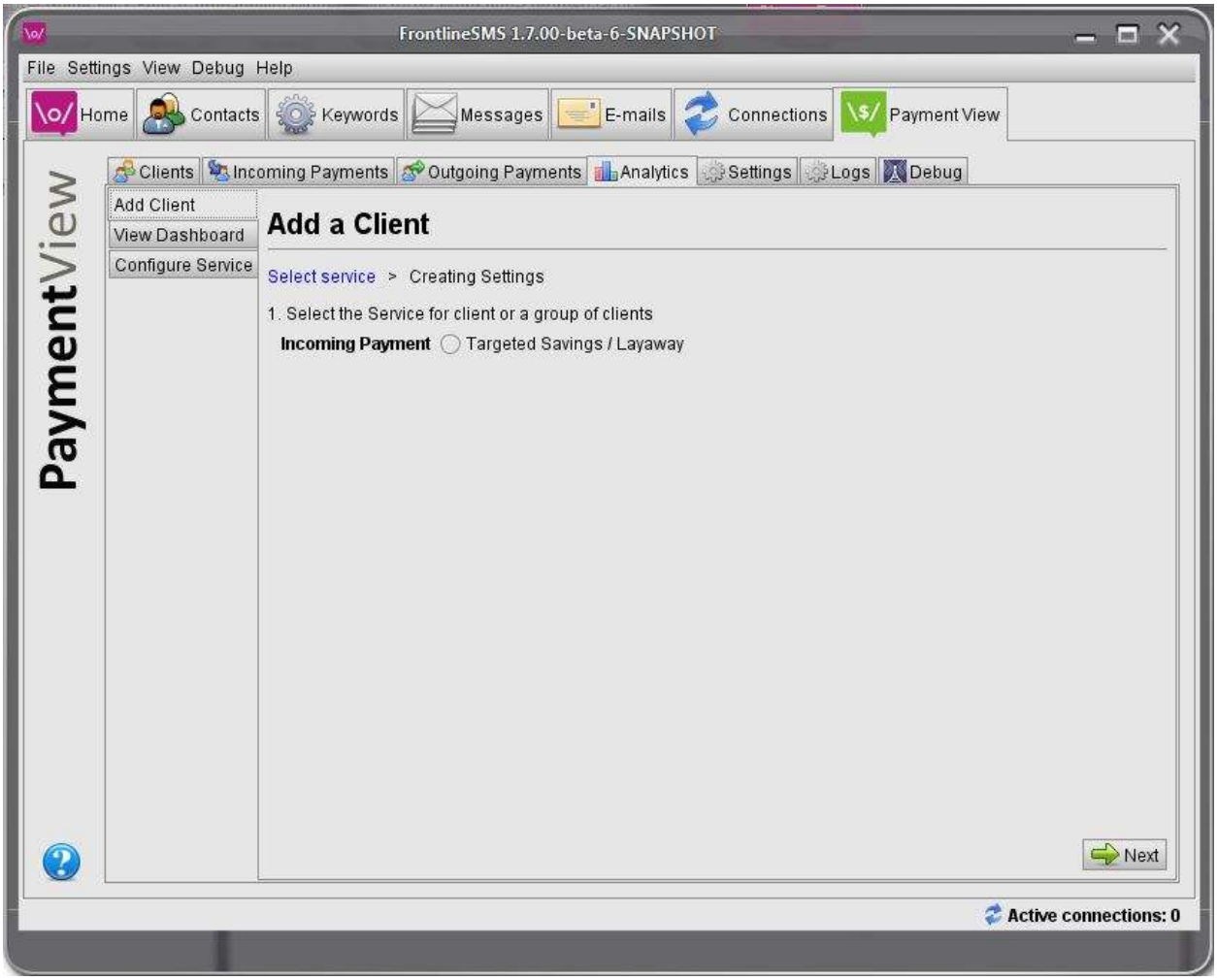
3. Navigate to the folder to which you would like to export Sent Payments and type the desired File name into the text box.

4. Click “OK.” The file path and name should now appear in the “File name” text box.
5. Select the information that you would like to export, corresponding to the columns on the Sent Payments screen. Once you have selected the columns you want, click “Export.”

6. Once the export has completed, a dialog box will appear telling you that it was successful. In addition, a .csv file of the name you chose will appear in the folder you selected. To view the file, simply open it using Excel or another program that supports .csv files.

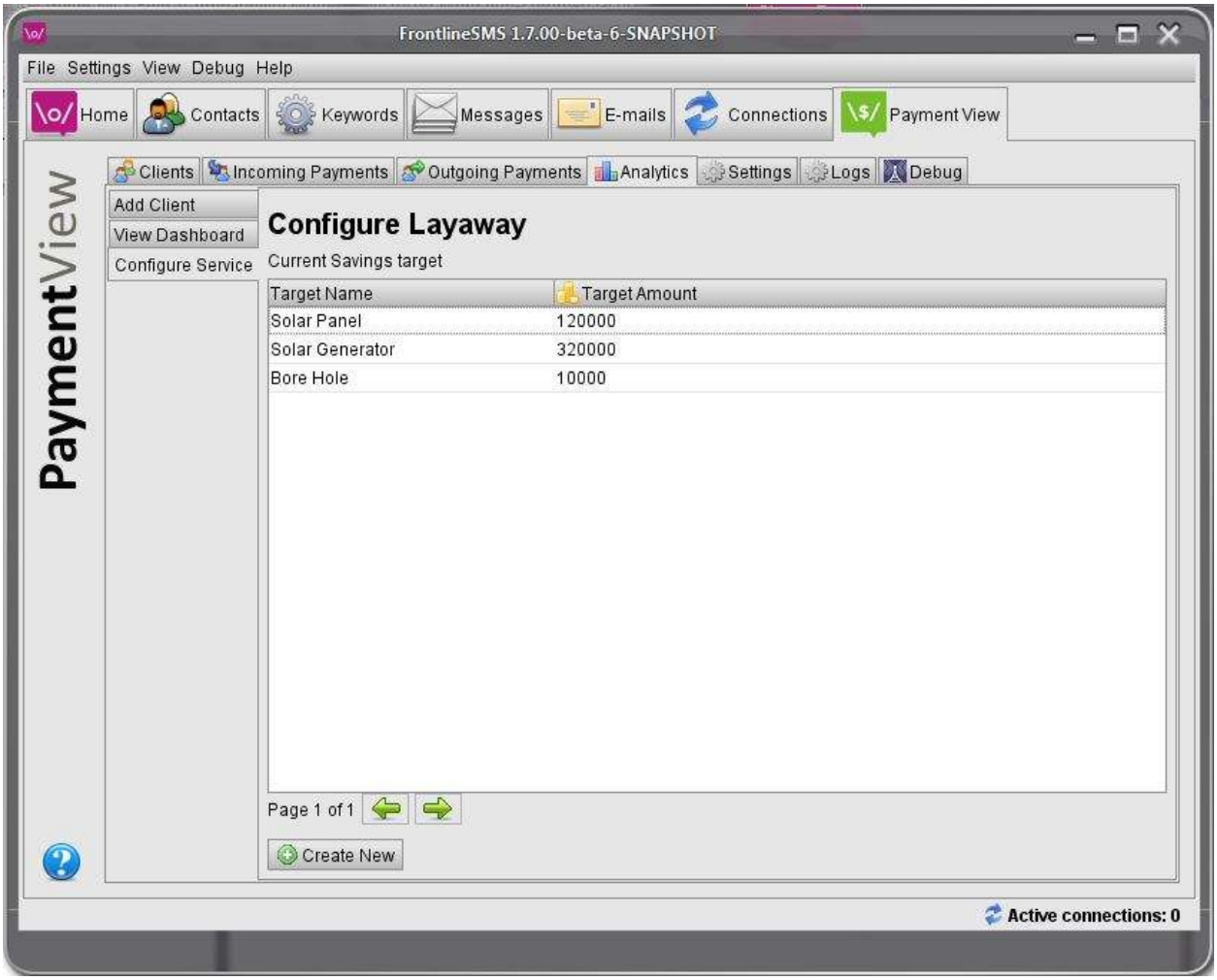
Analytics Tab

The analytics tab allows you to add clients to a particular targeted savings or payment program and track their progress as they repay loans, make payments toward a product on layaway, send in insurance premiums, and more. The system enables you to create new targeted savings and payment programs as needed and view the progress of one client or many clients. It also includes an export function that allows data transfer to other software programs for analysis and tracking.



Creating a Payment Target

1. On the “Analytics” tab, click “Configure Service” on the left sidebar. This will display all current savings targets.



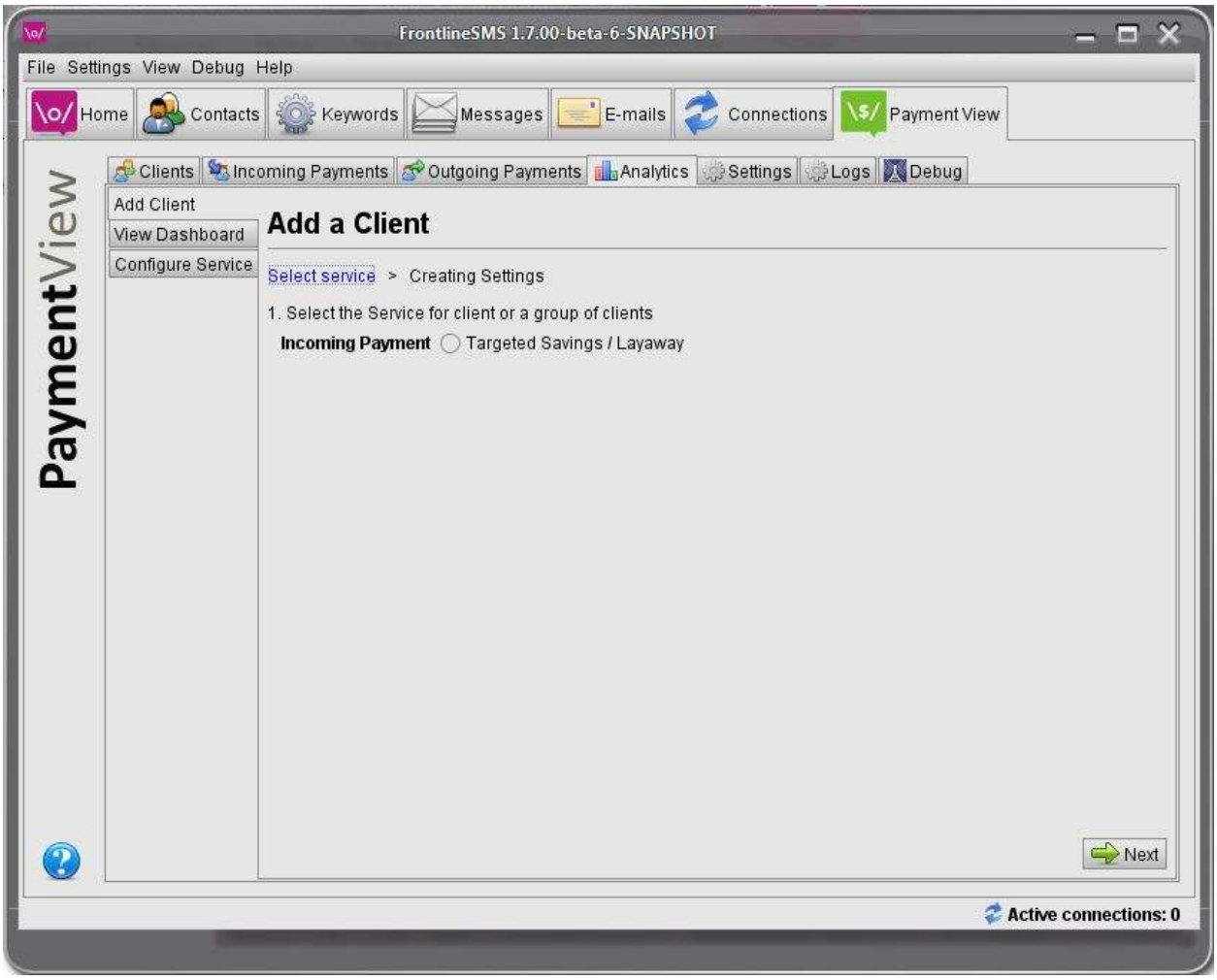
2. Click “Create New” at the bottom of the screen. A dialog box will appear, asking for the Target Name and Amount.

3. Fill in the desired name for the target and the amount to be saved or paid. Click “Create.”

4. A dialog box will appear, letting you know that the item was created successfully. Click “OK.”

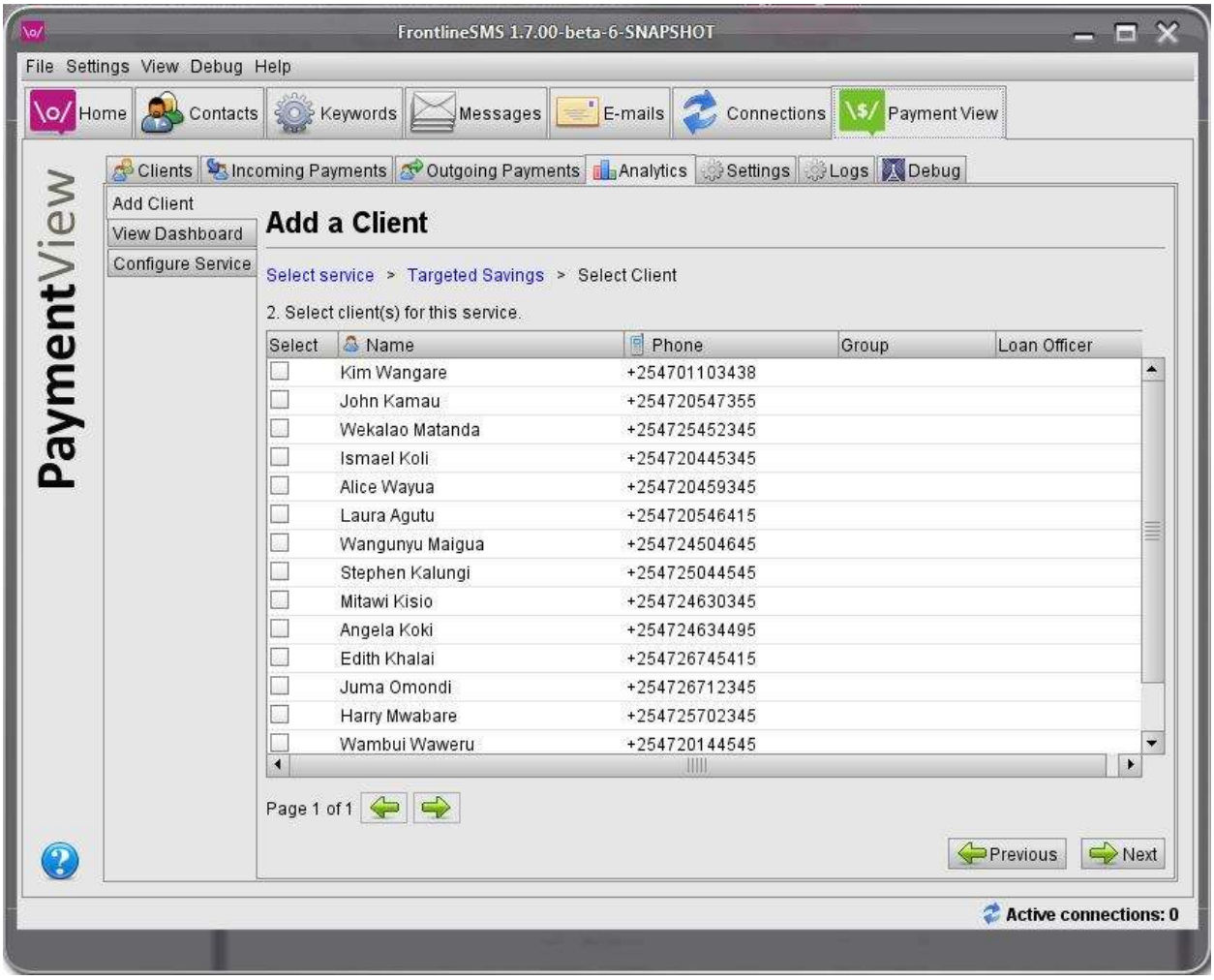
Adding a Client to a Targeted Savings Program

1. Click the “Add Client” tab on the left side of the screen.



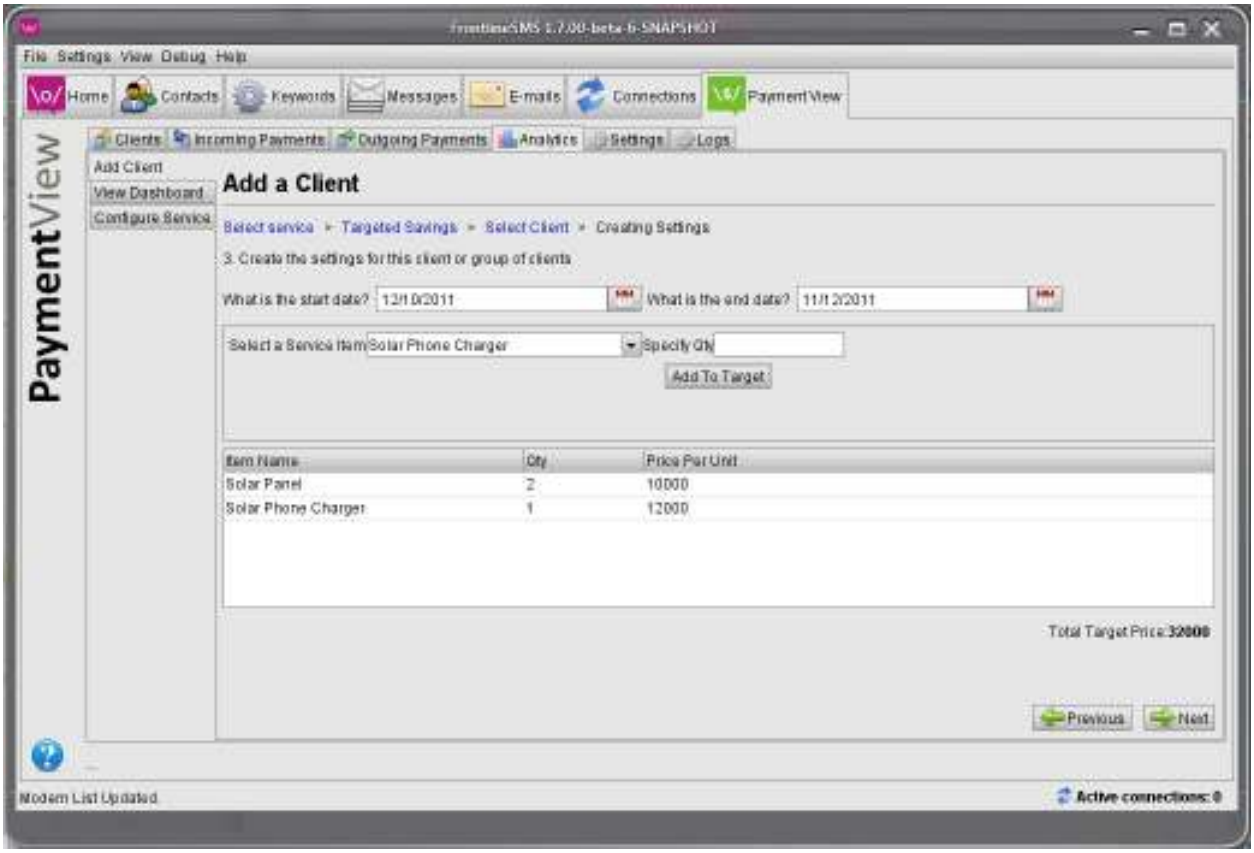
2. Select the program you would like to add clients to, e.g. Incoming Payment, Targeted Savings/Layaway. Click “Next” at the bottom right.

3. The next screen will display the complete client database. Select one or many clients to add to the program that you have selected. Click “Next.”

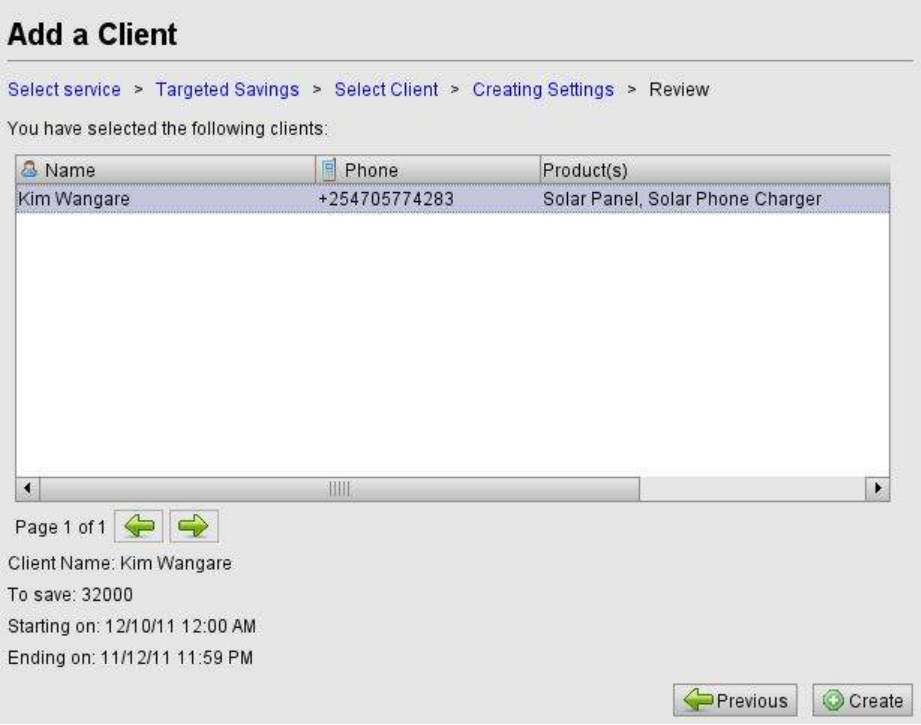


4. Select the start and end dates by clicking the calendar icons and selecting the desired dates. The end date is the deadline by which the target amount should be saved/paid. Next, add each desired service item by selecting from the drop-down menu, entering the quantity, and clicking "Add to Target." When you have added all of the required service items, click "Next."

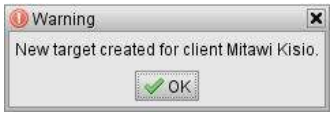
   NOTE: There is also an option to create a new target here. If you select this, a dialog box will appear asking for the target name and amount. Fill these in and click "Create." A new dialog box will appear, informing you that the item was created successfully. Click "OK." Now, select the new service item you just created from the drop-down menu, enter the quantity, and click "Add to Target."



5. The next screen allows you to review the details for each client you have added. Click through to make sure the details are correct. The summary for the selected client is displayed at the bottom of the screen.

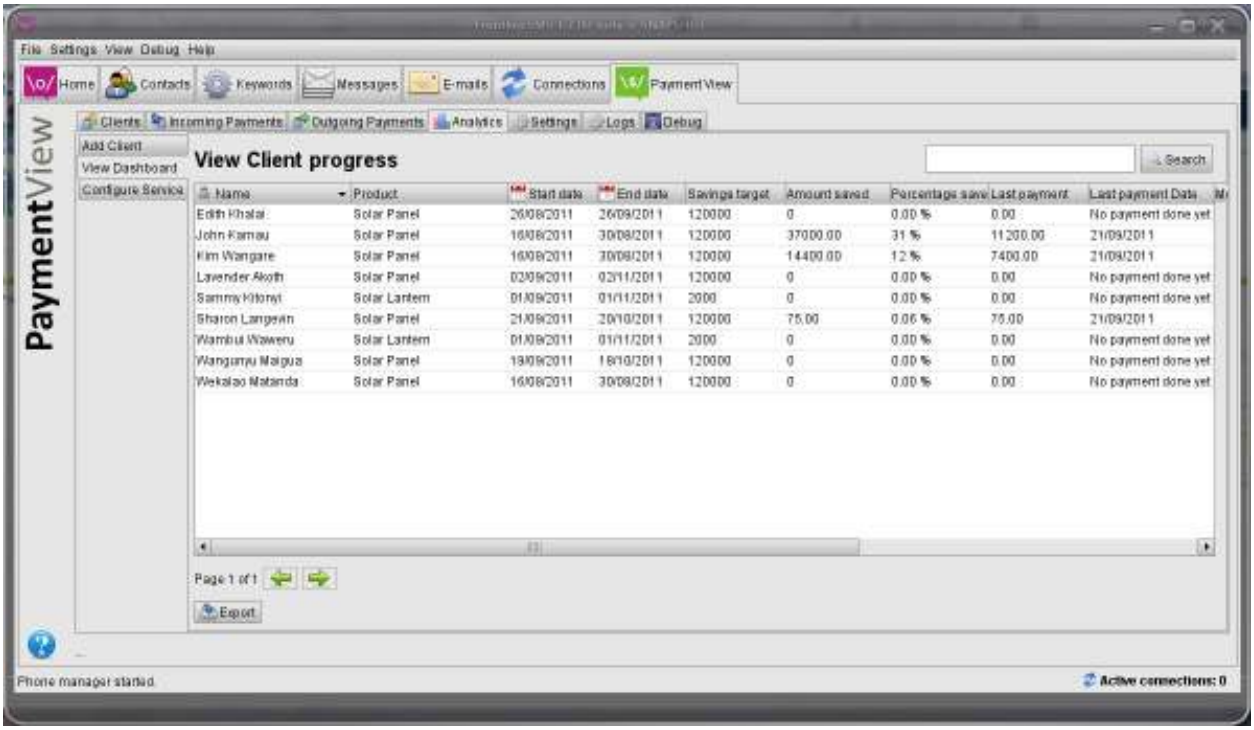


6. Once you are satisfied that the details are correct, click "Create." A dialog box will appear, informing you that the target has been created successfully. Click "OK."



Tracking Client Progress

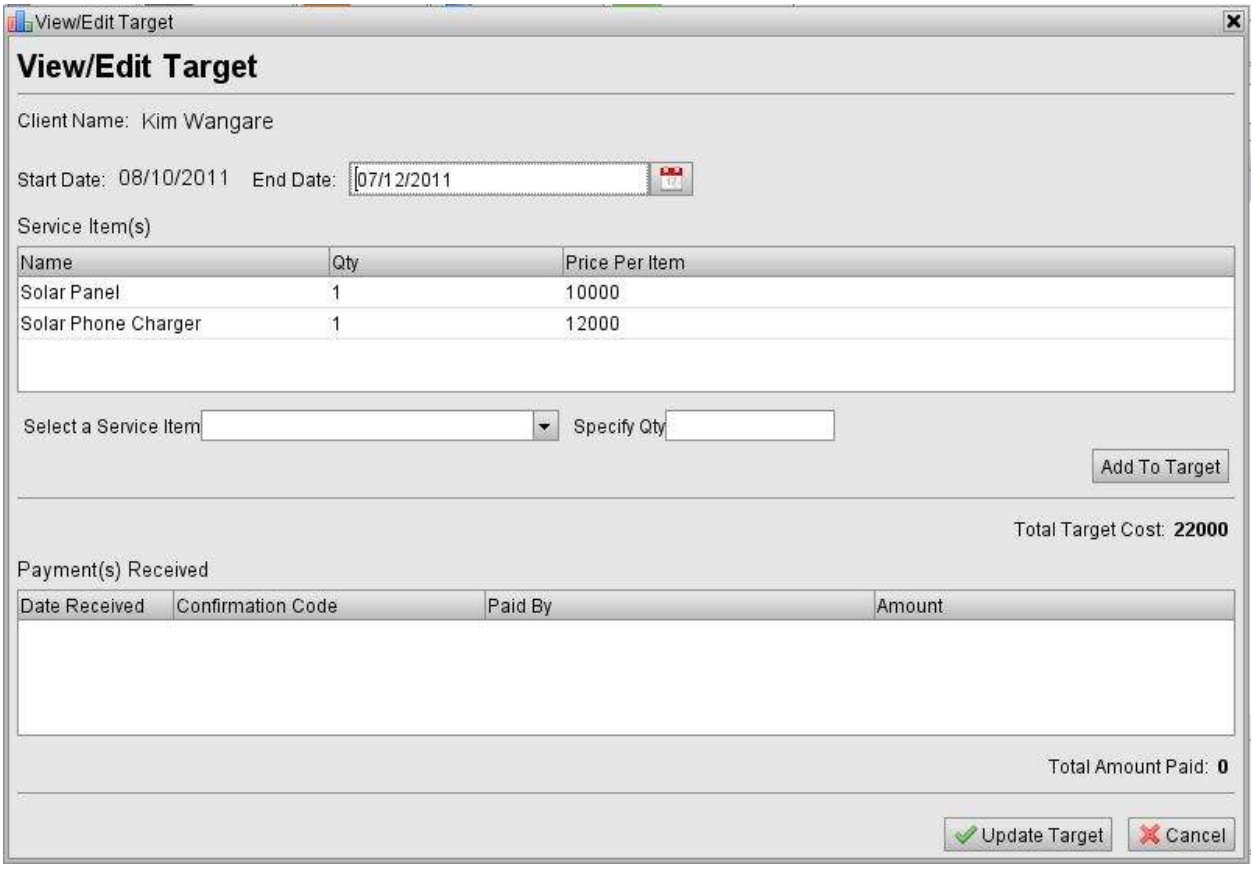
1. Click "View Dashboard" on the left sidebar. This will allow you to view the progress of all of your clients. This screen displays the Name, Start/End Dates, Savings Targets, Amounts/Percentages Saved, and information about the most recent payment. It also displays monthly stats, including the Current Amount Due (this month), Current Due Date, and Paid This Month. The Target Status can be "inactive," "active," "overdue," or "completed." "Inactive" means the system has not yet received a payment from this client. If the is currently paying, then they are "active." If they have not paid enough, they are "overdue." Once the full amount has been repaid, the client is "completed."



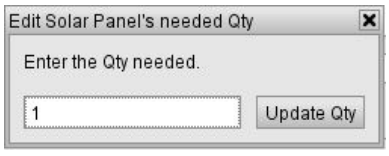
2. To view details for a particular client or about a particular product, use the search bar at the top right.

Editing a Client's Target

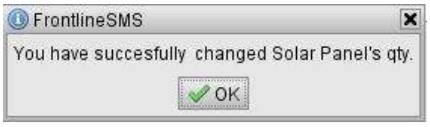
1. If you wish to change the amount that a client is saving toward or extend his/her end date, click on "View Dashboard" on the left sidebar. Right-click on the client whose target you would like to edit and click "View/Edit Target Analytics."
2. A dialog box will appear where you can edit the end date and service items associated with the client's savings target. To edit the end date, click the calendar icon and select a new date. To edit the quantity of a particular item, right-click on that item and select "Edit item's needed qty." This dialog box also displays recent payments associated with the client.



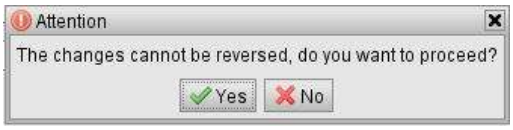
3. A dialog box will appear that allows you to enter a new quantity. Enter the desired quantity and click "Update Qty."



4. Another dialog box will inform you that you have successfully updated the item's quantity. Click "OK."



5. To add a new item to the client's target, select a service item from the drop-down menu, enter the quantity, and click "Add to Target."
6. When you have finished editing the target, click "Update Target." A dialog box will appear, reminding you that changes cannot be reversed. Click "Yes." Your client's target has now been updated.

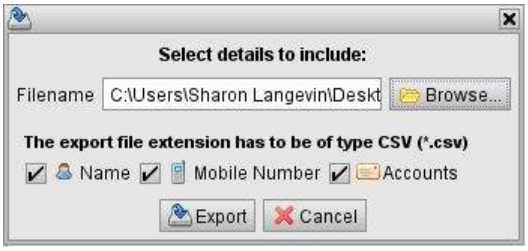


Exporting Client Progress Information

1. From the "View Dashboard" screen, click "Export."

2. A dialog box will appear, asking for a File name. Click "Browse…" and a new dialog box will appear.

3. Navigate to the appropriate folder and type the desired File name into the text box.
4. Click “OK.” The file path and name should now appear in the “File name” text box.



5. Select the information that you would like to export, corresponding to the columns on the View Client Progress screen. Once you have selected the columns you want, click “Export.”

6. Once the export has completed, a dialog box will appear telling you that it was successful. In addition, a .csv file of the name you chose will appear in the folder that you selected. To view the file, simply open it using Excel or another program that supports .csv files.

Additional Notes on *PaymentView*

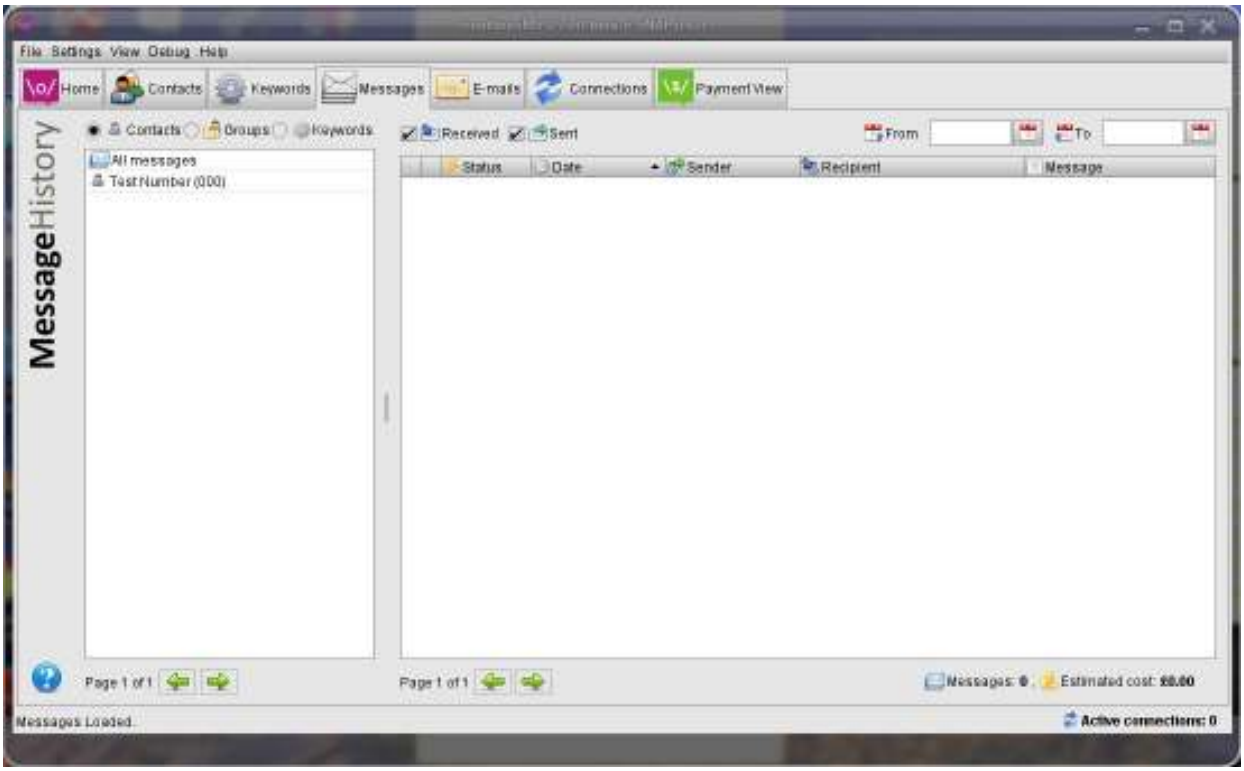
The final tab that you might use in *PaymentView* is the "Logs" tab. This tab displays a view of all actions performed by the user, and cannot be edited. It shows a list of all received payments, sent payments, deleted payments, balance inquiries, and any other actions you perform while using the program. This tab provides an extra level of security. If you feel that something fraudulent has occurred, simply check the Logs tab to find out if any payments were sent or deleted in an inappropriate manner.

Using FrontlineSMS 1.7

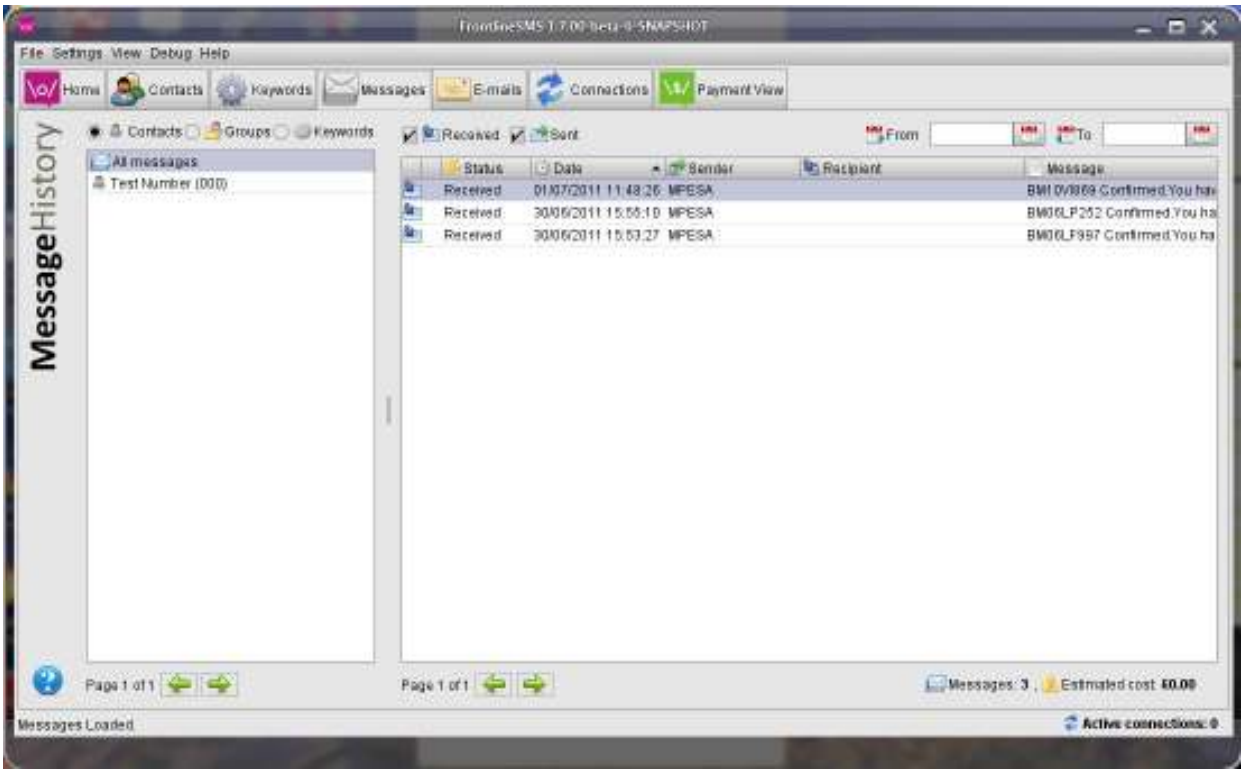
FrontlineSMS is the award-winning SMS gateway on which *PaymentView* is built. This platform enables simple desktop management of SMS communication with groups and contacts. For your purposes, FrontlineSMS allows you to send and receive SMS messages from your mobile money clients (every time you add a client to your client database, they are automatically added to your contacts list in FrontlineSMS). The messages inbox will also record all of the mobile money payments that you receive.

Viewing Your Incoming Payments

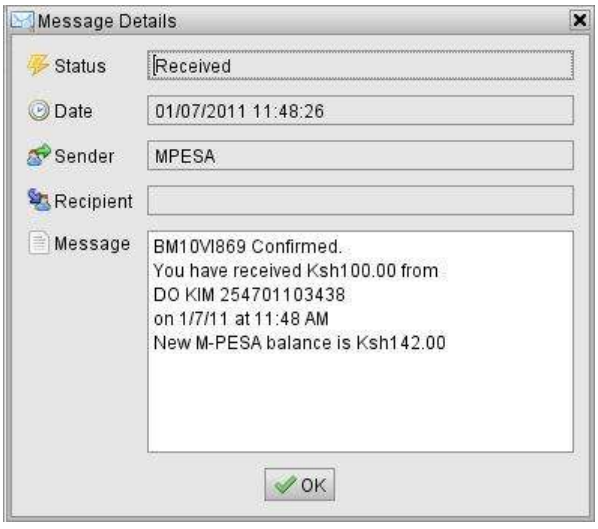
1. First, click the “Messages” tab.



2. On the “Messages” tab, click “All messages” at the top left. All of your messages will appear on the right side of the screen.



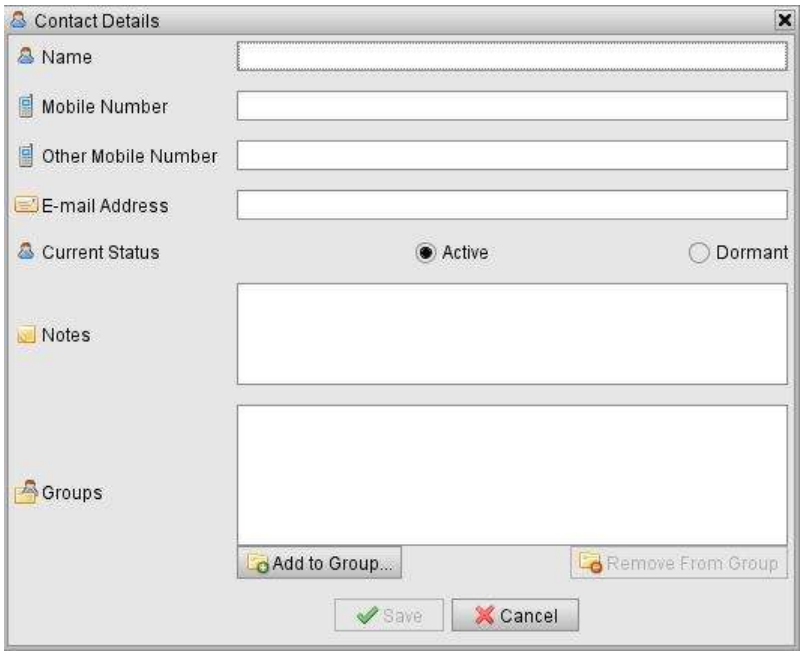
3. In this example, we have received three mobile payments. To view the contents of the message, double-click the message. A dialog box will appear with the message details. You will see that the transaction has been confirmed, and your new balance will be displayed in the message.



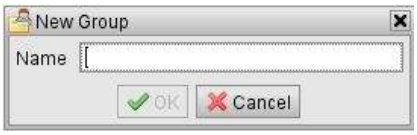
Managing Your SMS Contacts

1. To add a new contact, click “New Contact” at the bottom of the screen. A dialog box will appear where you can enter your contact’s details. Fill out the information and click “Save.”

   NOTE: Individuals added as clients on the “Payment View” “Client” tab are automatically added to the Contact list. Individuals added as contacts on the “Contacts” tab are NOT added automatically to the PaymentView Client Database.



2. Clients can also be added to contact groups for easy bulk messaging. To create a contact group, click “New Group” at the bottom left.
3. A dialog box will appear. Enter the name of the contact group and click “OK.”



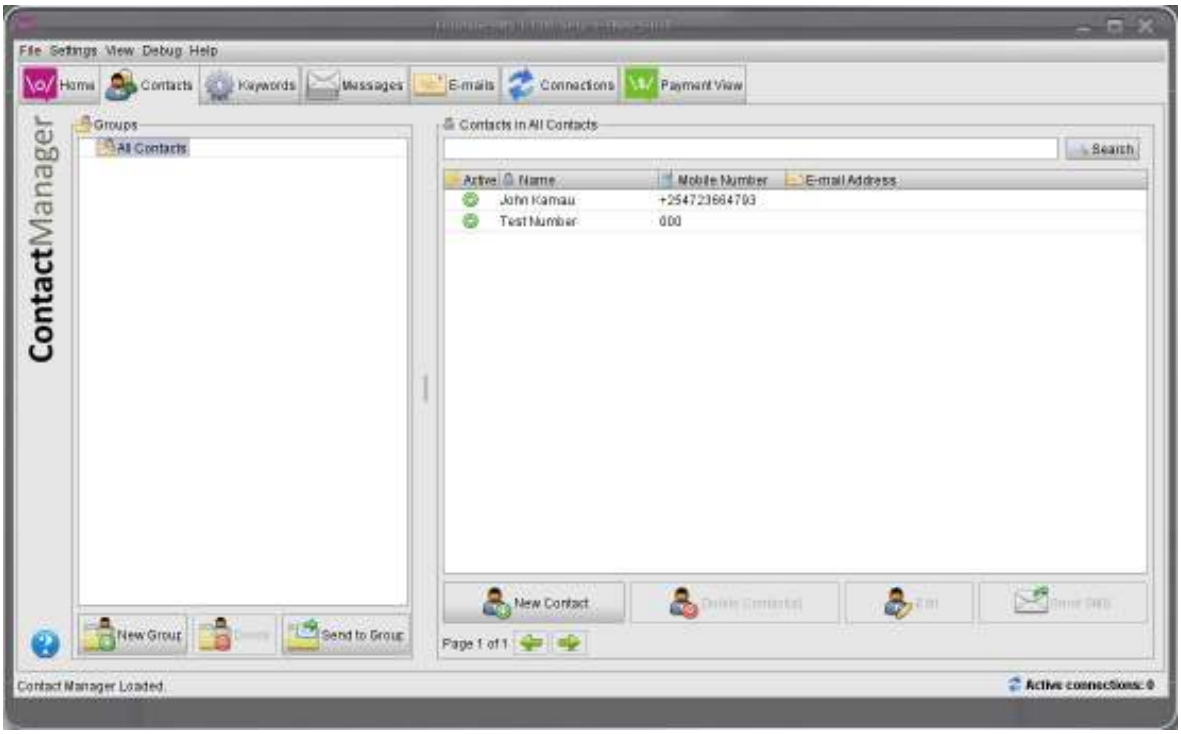
4. To add contacts to the new group, highlight the client or clients you wish to add. Right-click and select “Add to Group.” Select the appropriate group.
5. To remove clients from a group, select the clients you wish to remove and select “Remove from Group.” Select the group you wish to remove the clients from.
6. To delete a contact group, select the group and click the “Delete” button at the bottom left.

Sending and Receiving SMS Messages

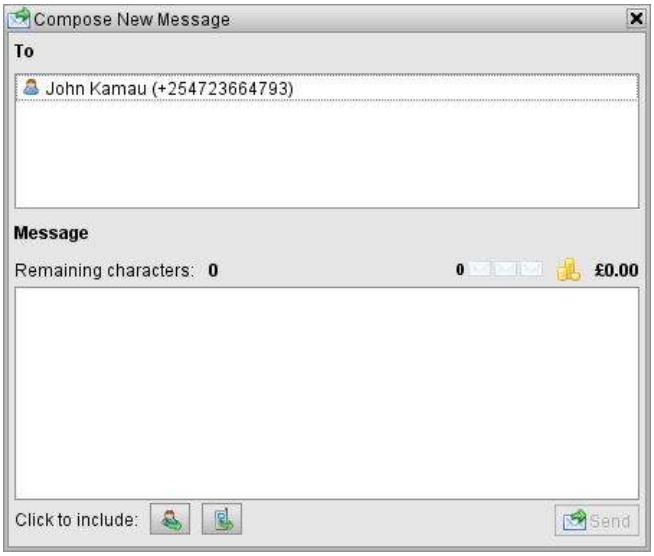
The “Messages” tab also records all incoming and outgoing SMS messages. All messages appear in your messages inbox, along with your mobile money transactions.

Sending an SMS Message

1. Go to the “Contacts” tab.



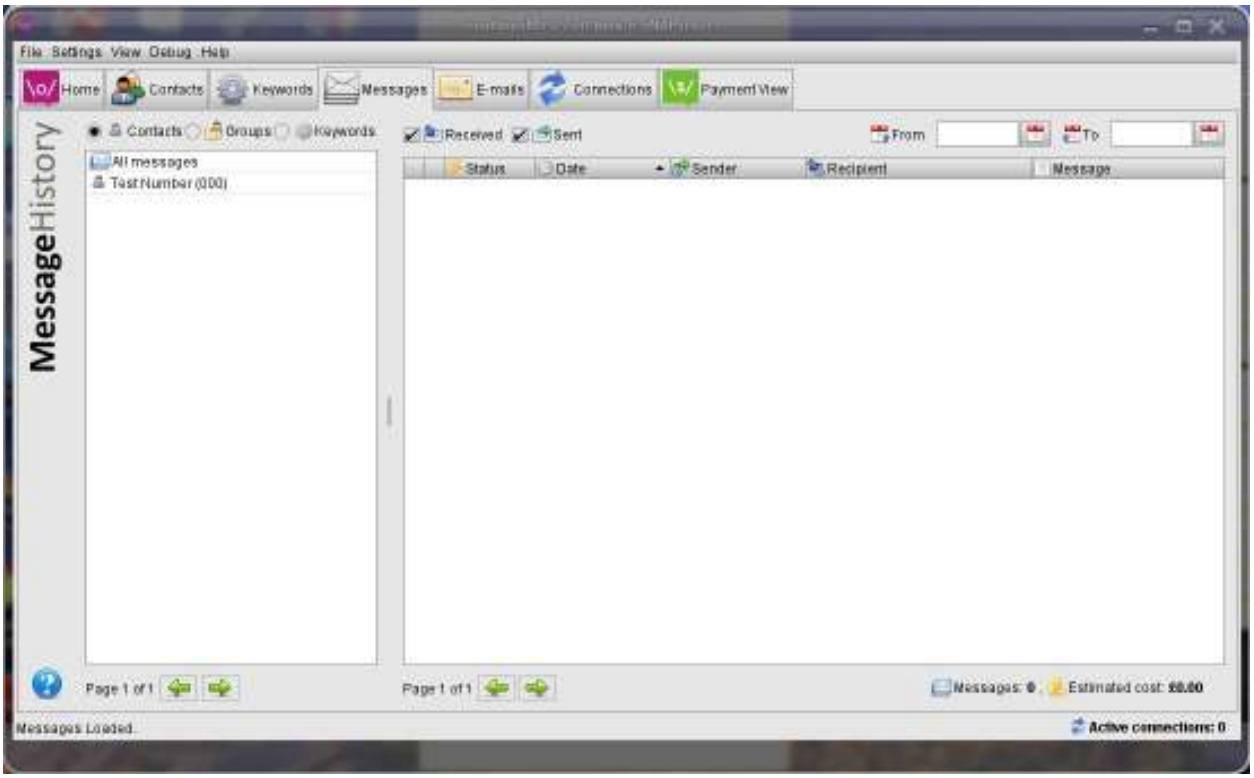
2. Select the client to whom you wish to send a message. Click “Send SMS” at the bottom left.



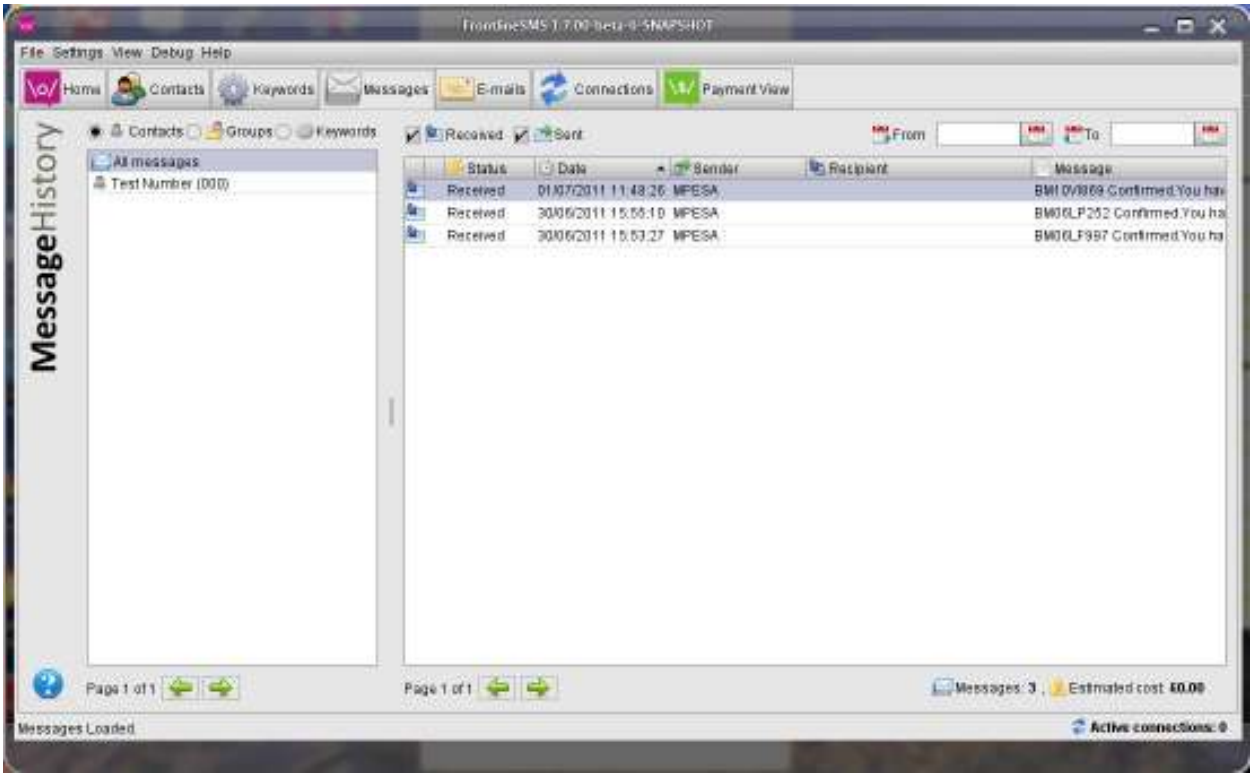
3. Type the desired message and click “Send” at the bottom left. To view the status of your outgoing message, return to the “Messages” tab.

Receiving an SMS Message

1. Go to the “Messages” tab.



2. Click “All messages” on the top left.



3. Here you can see all of your incoming and outgoing messages. The “Status” column will tell you whether the message was received or sent, and it also has a “Pending” status for messages that are waiting to be sent. All mobile money confirmations will be visible on this screen, as well as any sent or received SMS messages.