



## User Portal Manual

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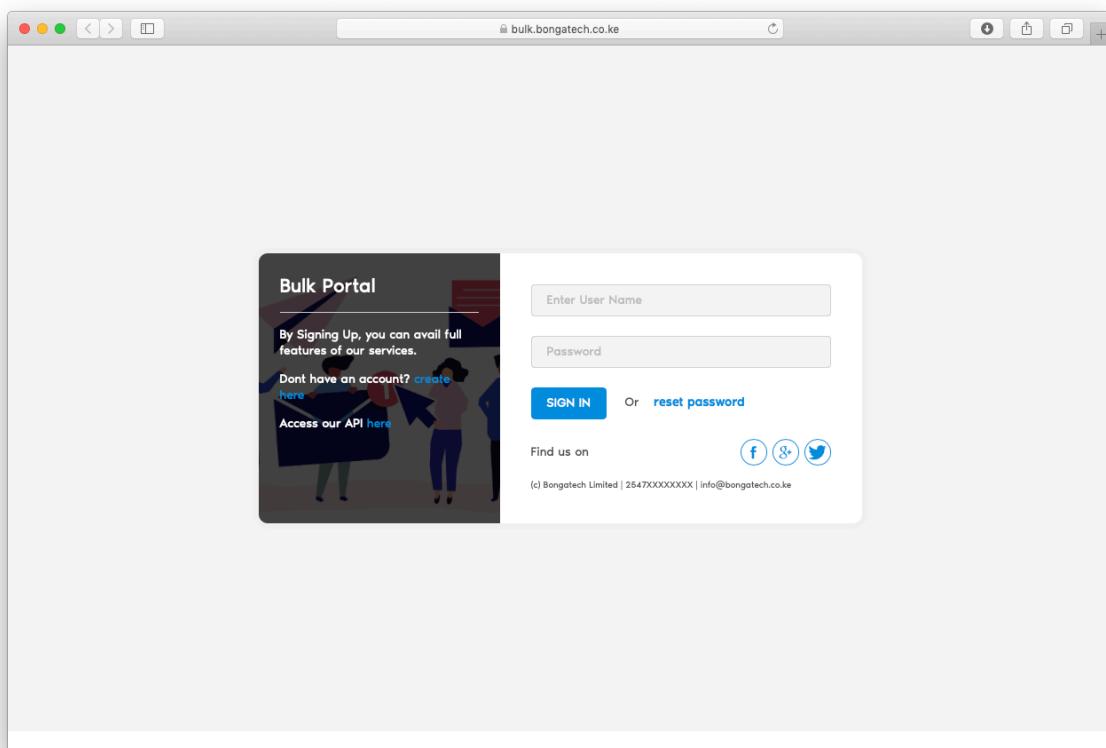


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**SMS**  
BIZ

## LOGIN

Visit <http://bulk.bongatech.co.ke> using any web browser. A screen similar to the one below will be displayed. Enter your username and password then click on Sign in button.



If the username and password you entered are valid, you will be navigated to a screen similar to the one below called the dashboard.



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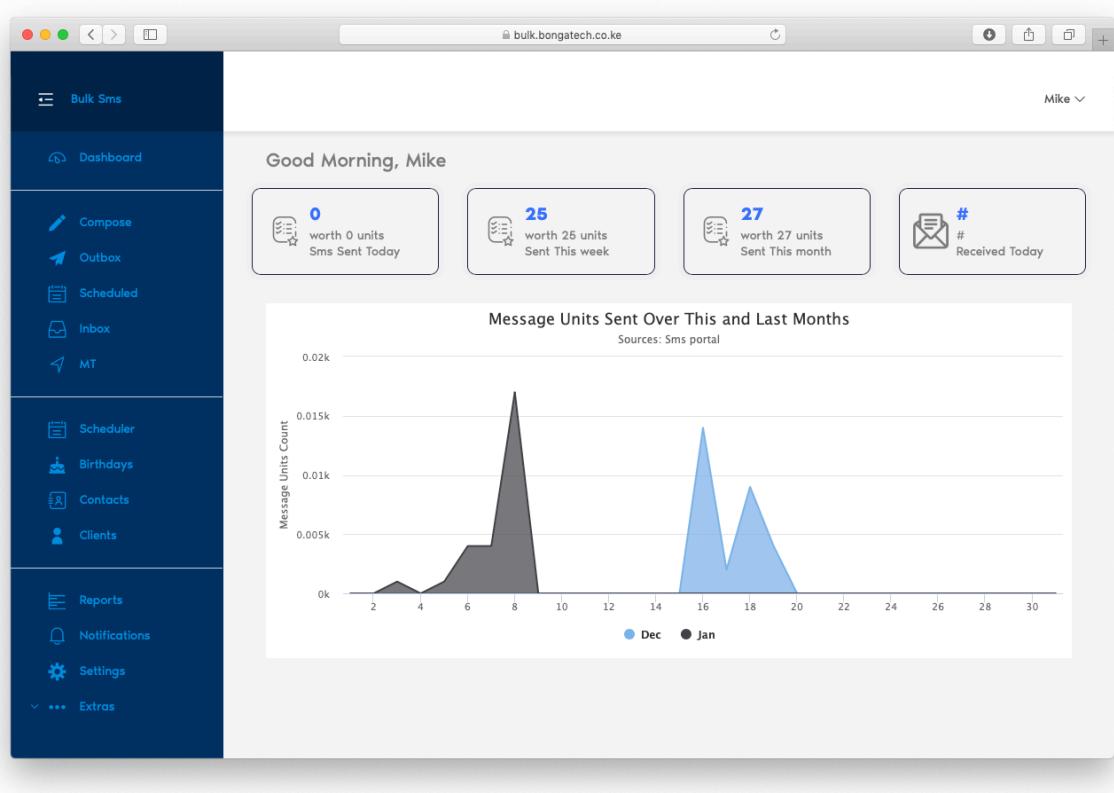


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Good Morning, Mike

- 0 worth 0 units Sms Sent Today
- 25 worth 25 units Sent This week
- 27 worth 27 units Sent This month
- # Received Today

Message Units Sent Over This and Last Months  
Sources: Sms portal

Date	Message Units Count
Dec 2	~0.0005k
Dec 4	~0.0005k
Dec 6	~0.0015k
Dec 8	~0.015k
Dec 16	~0.015k
Dec 18	~0.008k
Jan 16	~0.002k

## How to top up

In order to get started using your account, you need to first top up. Follow the simple steps in bellow to get started.



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- i. Go to the lipa na M-Pesa option
- ii. Select pay bill from your M-Pesa menu
- iii. Enter the business number as **854600**
- iv. Enter your full Bongatech account number
- v. Enter the amount you wish to pay
- vi. Enter your MPesa pin

When the top up is successful, you will see that your account balance has been credited sms units.

## SIDE BAR DASHBOARD

### 1. Compose



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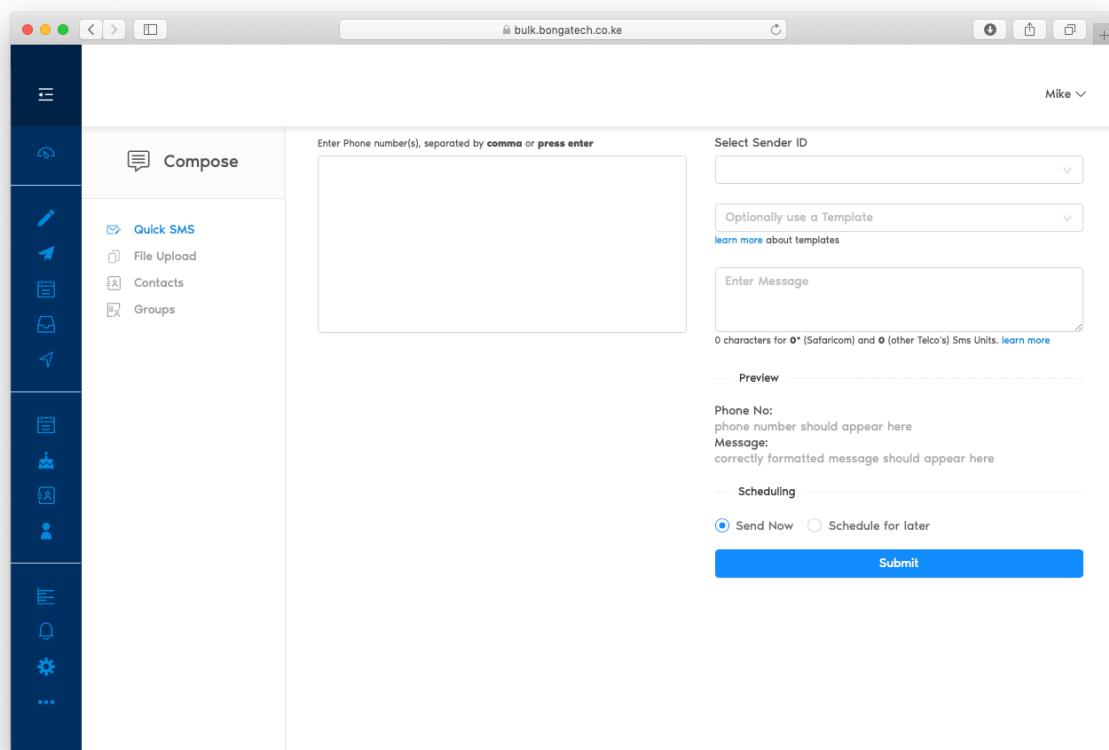
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**SMS**  
BIZ

Click on the COMPOSE SMS menu link. Upon clicking, you will be navigated to a screen similar as the one shown below:



There are four tabs under the **Compose Option** namely:

- Quick SMS
- File Upload
- Contacts
- Groups

### a) Quick SMS

Under this category, sending SMS is as easy as following the following steps:

- i. At the Recipients text field, put phone numbers in any order separated by a comma or hit enter.



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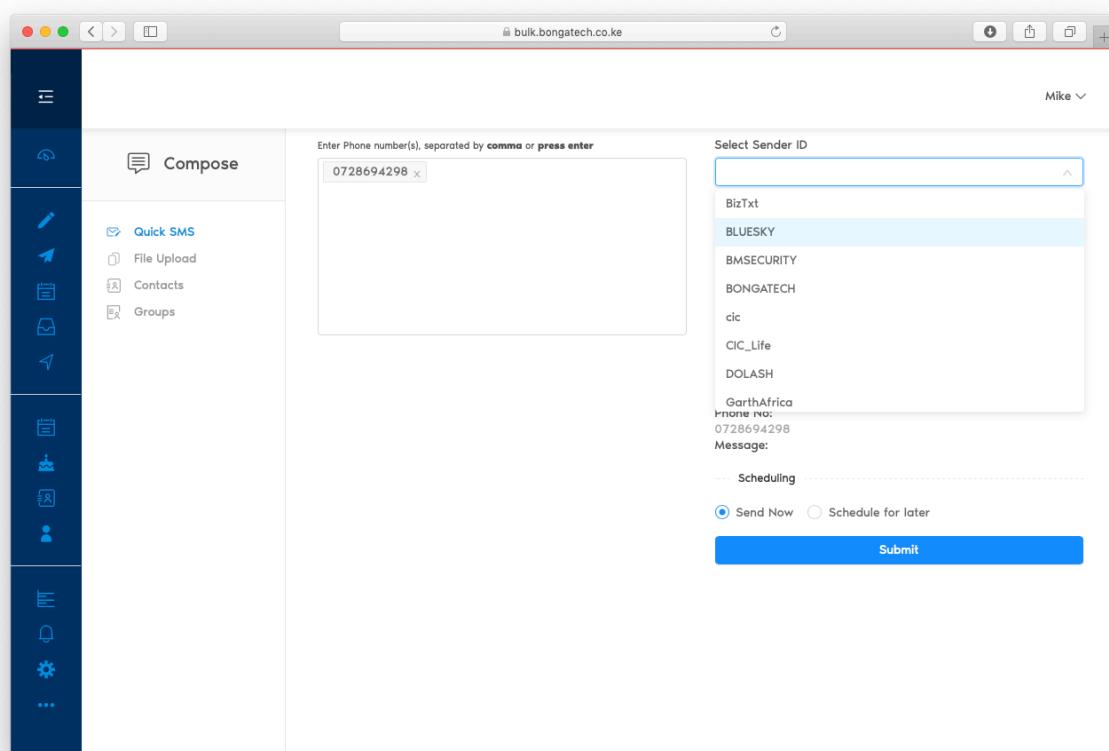
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**BIZ** **SMS**®

ii. Select the sender from the drop-down list.



iii. Then type your message on Message text field followed by



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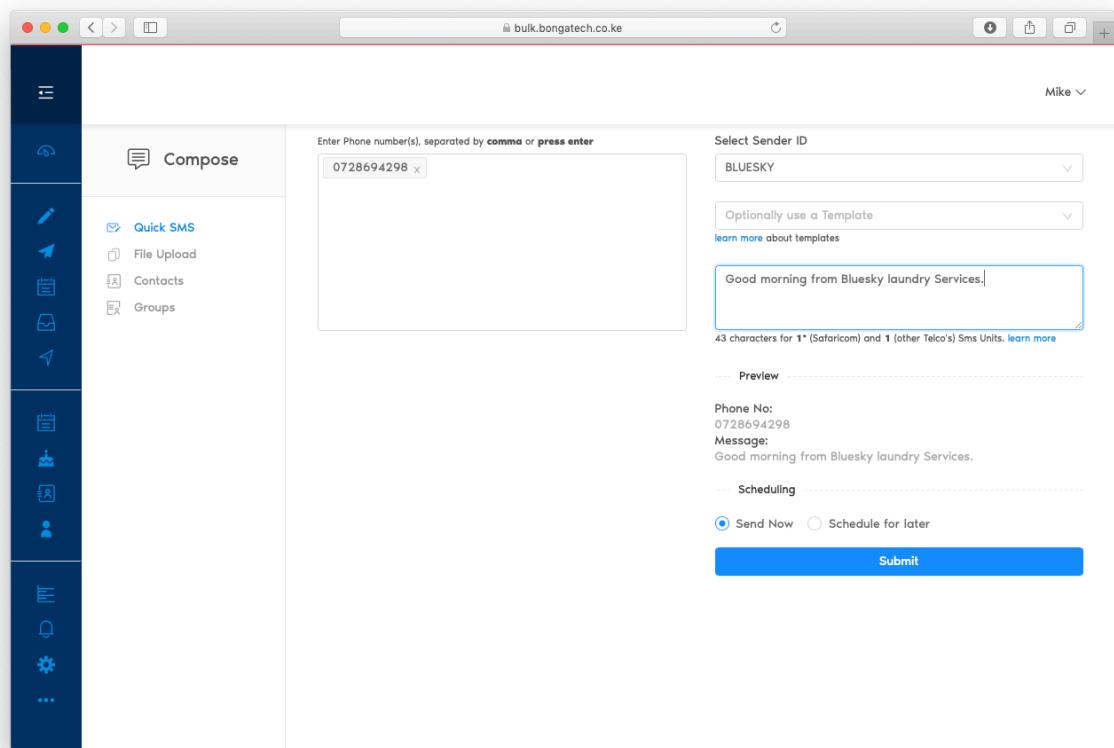


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- iv. Click on SEND button and you will be prompted with a similar screen.



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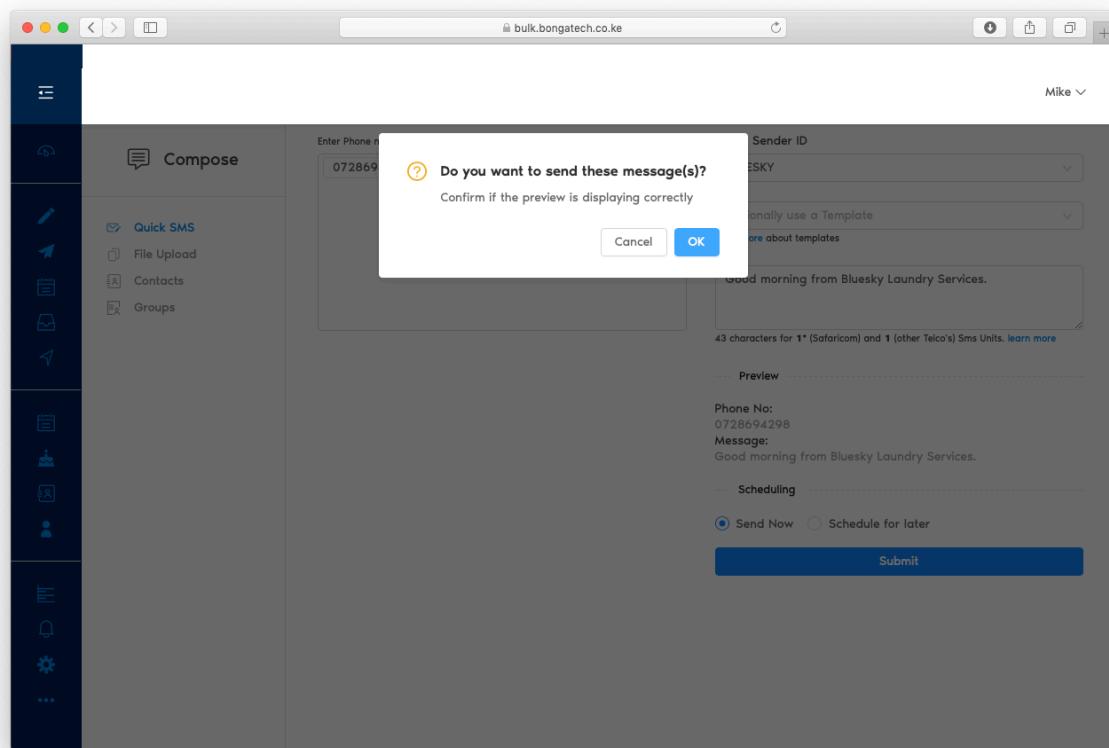


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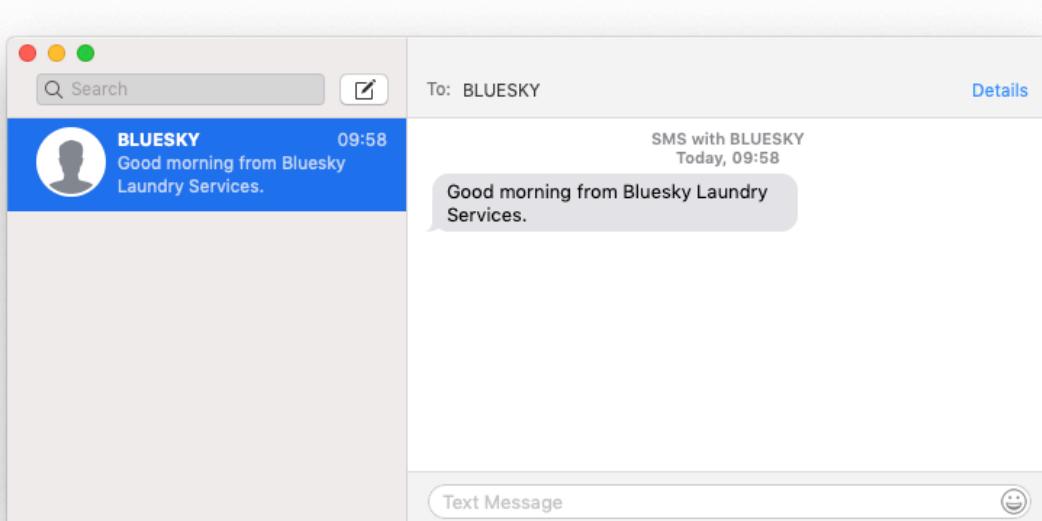


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**SMS**  
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- v. Once you confirm the message and click, **Ok**. The message is sent automatically to terminal. Here is the message we have just sent.



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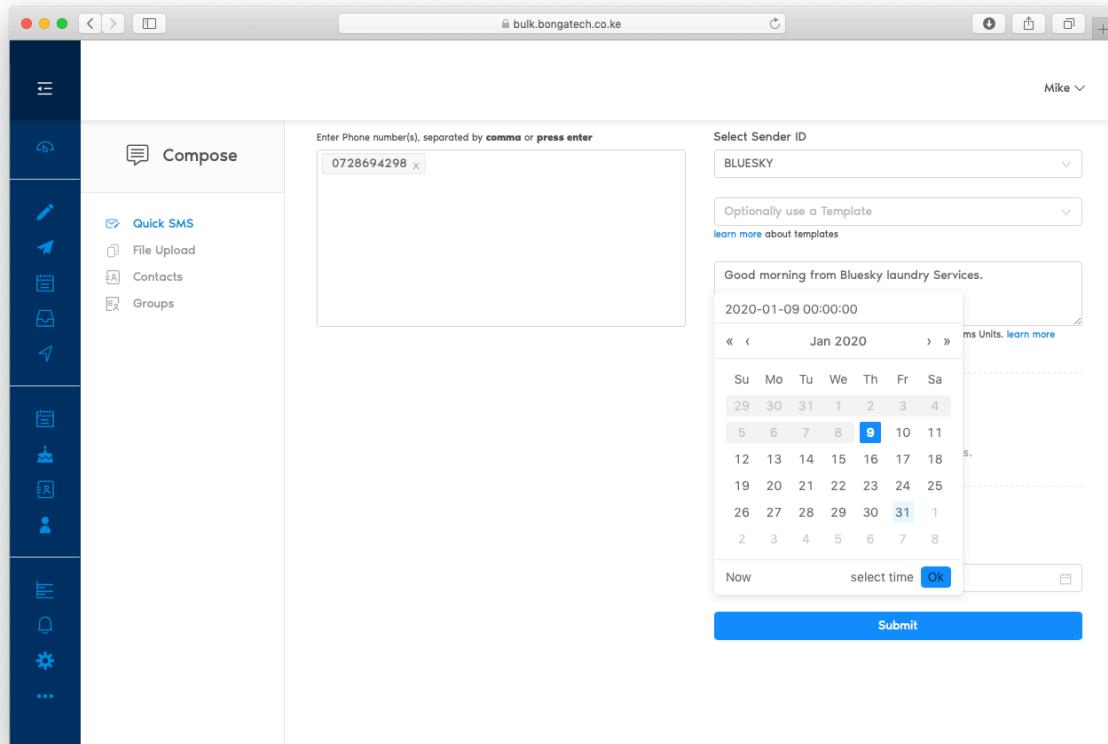


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**SMS**  
BIZ

Also if you would like to schedule the message to go out at a particular time, you can select a schedule time option

vi. Just select the date & time, and you are good to go



### b) File upload

You can send bulk message to a given phone numbers on Microsoft Excel. The file will have to be uploaded to the SMS portal as will be illustrated shortly.

Upon clicking the **Upload File** tab, a screen similar to the one shown below will be displayed.



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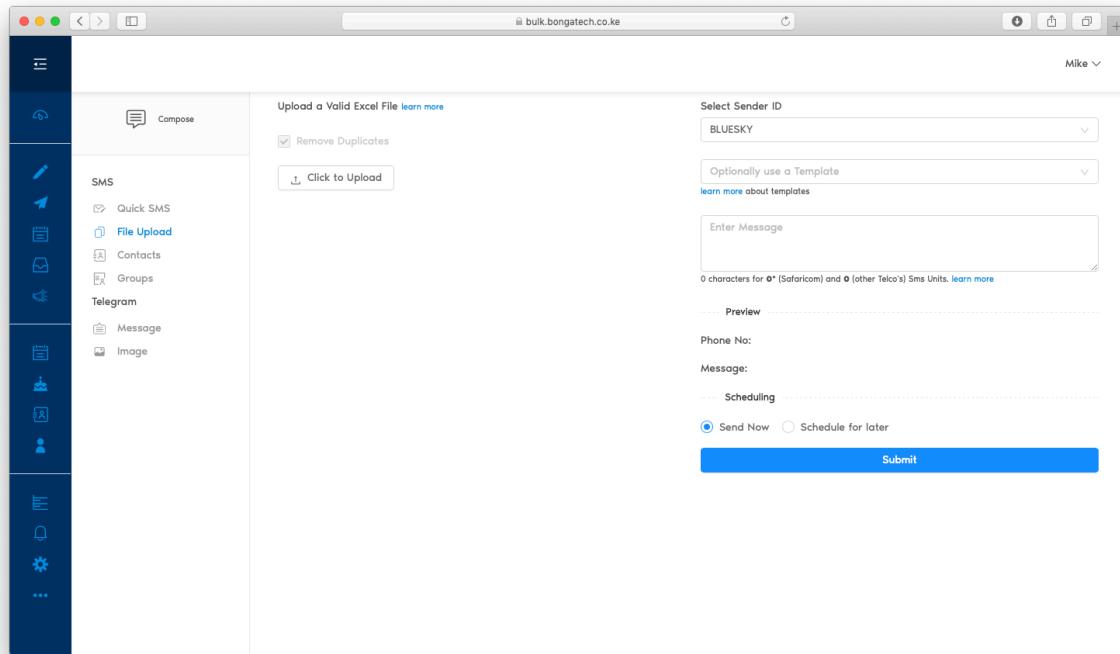


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## Below is a sample xlsx file you can upload.

- A sample excel file will be as shown below where phone numbers are in Column A. You can choose to have names which is optional in column B.

### Note

**You can only upload one valid file per request.**

**All first rows of the file should contain HEADERS, to describe the actual column. (this translates to actual data begining from the second row)**



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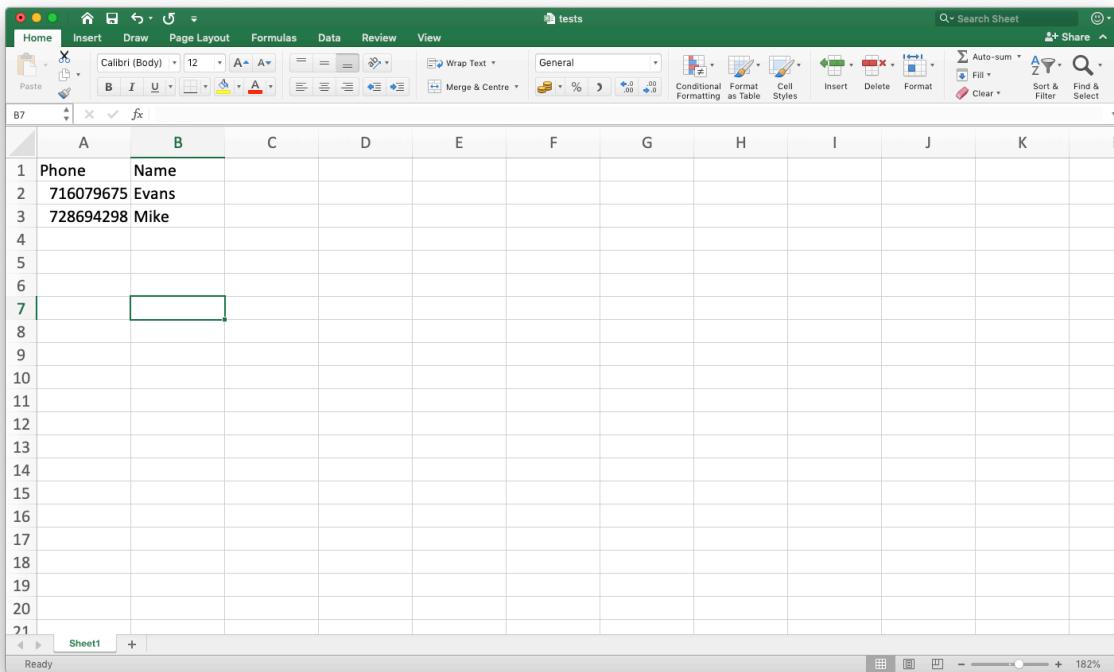


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A screenshot of Microsoft Excel showing a contacts list. The spreadsheet has two columns: 'Phone' and 'Name'. Row 1 contains the column headers 'Phone' and 'Name'. Rows 2 and 3 contain data: row 2 has '716079675' in the 'Phone' column and 'Evans' in the 'Name' column; row 3 has '728694298' in the 'Phone' column and 'Mike' in the 'Name' column. The rest of the rows (4 to 21) are empty.

	Phone	Name
1	716079675	Evans
2	728694298	Mike
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		

### c) Contacts

To send message to all contacts in your address book, check the checkbox next to send to all contacts as shown on the screenshot below:



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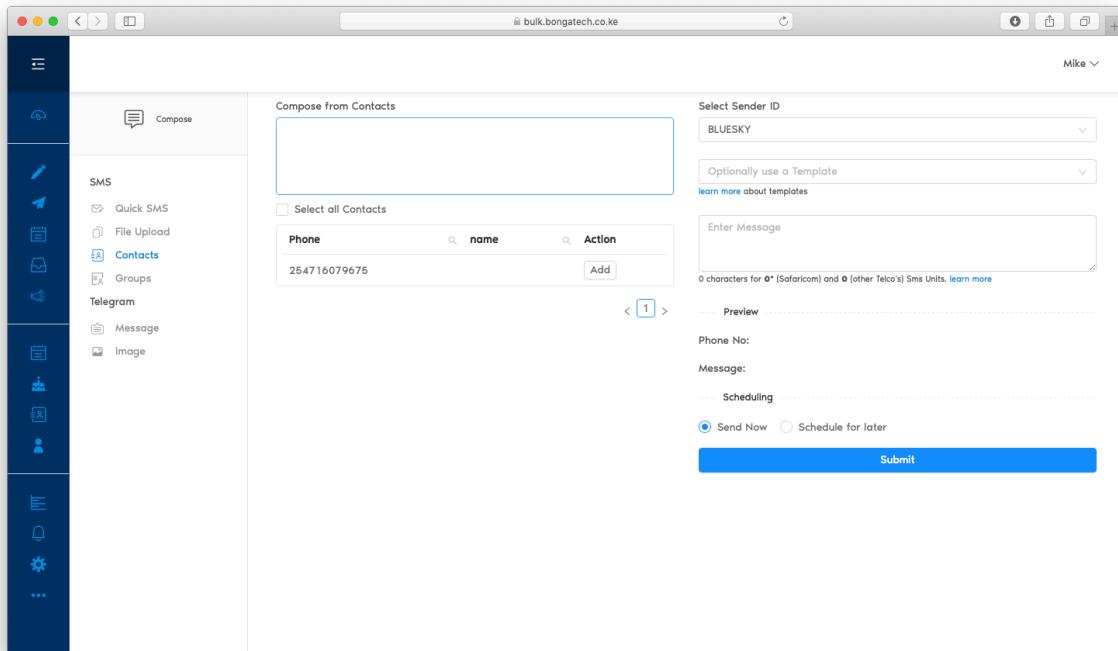


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The Preview part will show you the first recipient in your address book and the message. If Recipient is a phone number with the correct format and the message previewed is also correct then click the **SEND** button and the message will be sent to all contacts in your address book.

## d) Groups

Upon clicking on the **Groups** tab, a screen similar to the one below will appear. You will learn how to create a group and add contacts to it when you reach the **GROUPS** topic of this User Guide. This subsection assumes you already have one or more groups with contacts.

You can send a single message to one or more groups at once. To select one group or more at once, click on the blank text field near the

word Groups \* as shown below



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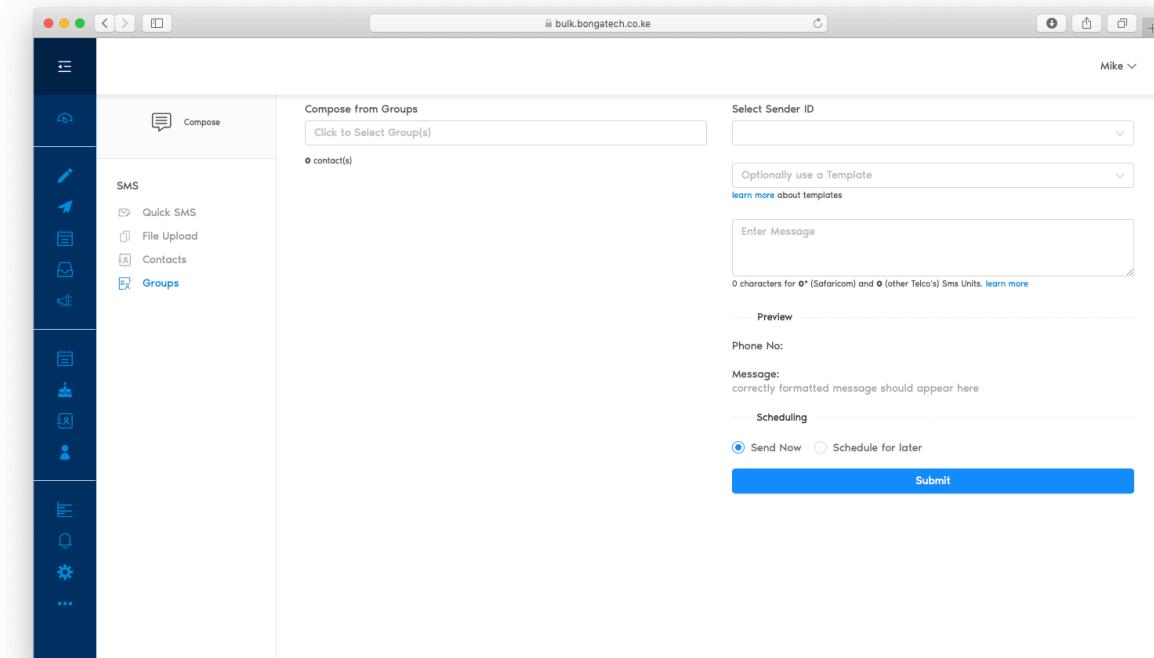


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After clicking on the blank text field as shown above, a drop-down list of your groups will appear. Select one group at a time. After typing your message and selecting the source address, click on the **SEND** button. Upon clicking the send button, the message will be sent to your intended recipients.

## 2. Outbox

This is where all SMS sent out are stored. When you navigate to this panel, you will find a similar screen like this.



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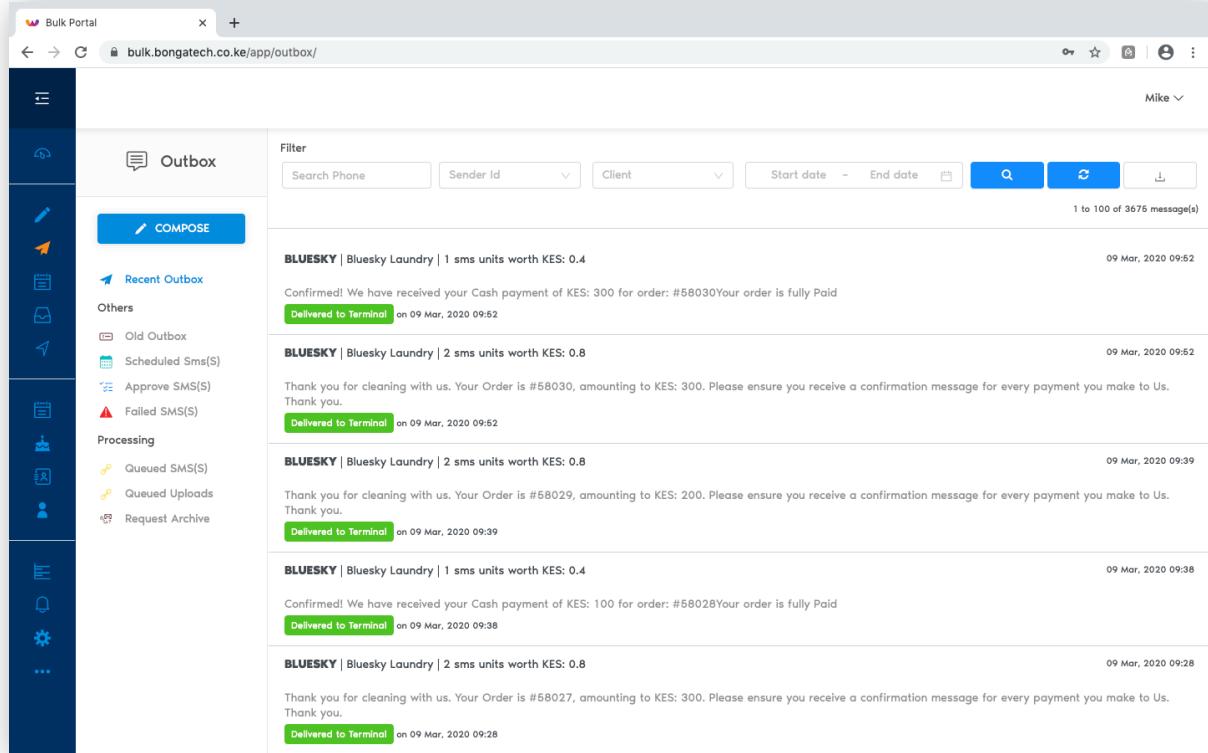


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The screenshot shows the Bulk Portal Outbox interface. On the left is a sidebar with various icons and sections: Recent Outbox, Old Outbox, Scheduled Sms(S), Approve SMS(S), Failed SMS(S), Processing, Queued SMS(S), Queued Uploads, and Request Archive. The main area is titled "Outbox" and contains a "Filter" bar with fields for Search Phone, Sender Id, Client, Start date, End date, and a search button. Below the filter is a message list with the following details:

- BLUESKY | Bluesky Laundry | 1 sms units worth KES: 0.4** (09 Mar, 2020 09:52)  
Confirmed! We have received your Cash payment of KES: 300 for order: #58030Your order is fully Paid  
**Delivered to Terminal** on 09 Mar, 2020 09:52
- BLUESKY | Bluesky Laundry | 2 sms units worth KES: 0.8** (09 Mar, 2020 09:52)  
Thank you for cleaning with us. Your Order is #58030, amounting to KES: 300. Please ensure you receive a confirmation message for every payment you make to Us. Thank you.  
**Delivered to Terminal** on 09 Mar, 2020 09:52
- BLUESKY | Bluesky Laundry | 2 sms units worth KES: 0.8** (09 Mar, 2020 09:52)  
Thank you for cleaning with us. Your Order is #58029, amounting to KES: 200. Please ensure you receive a confirmation message for every payment you make to Us. Thank you.  
**Delivered to Terminal** on 09 Mar, 2020 09:52
- BLUESKY | Bluesky Laundry | 1 sms units worth KES: 0.4** (09 Mar, 2020 09:38)  
Confirmed! We have received your Cash payment of KES: 100 for order: #58028Your order is fully Paid  
**Delivered to Terminal** on 09 Mar, 2020 09:38
- BLUESKY | Bluesky Laundry | 2 sms units worth KES: 0.8** (09 Mar, 2020 09:28)  
Thank you for cleaning with us. Your Order is #58027, amounting to KES: 300. Please ensure you receive a confirmation message for every payment you make to Us. Thank you.  
**Delivered to Terminal** on 09 Mar, 2020 09:28

It displays a list of all your delivery reports in one go and If you want to download a copy of the data report, you can click on this button on top right corner.



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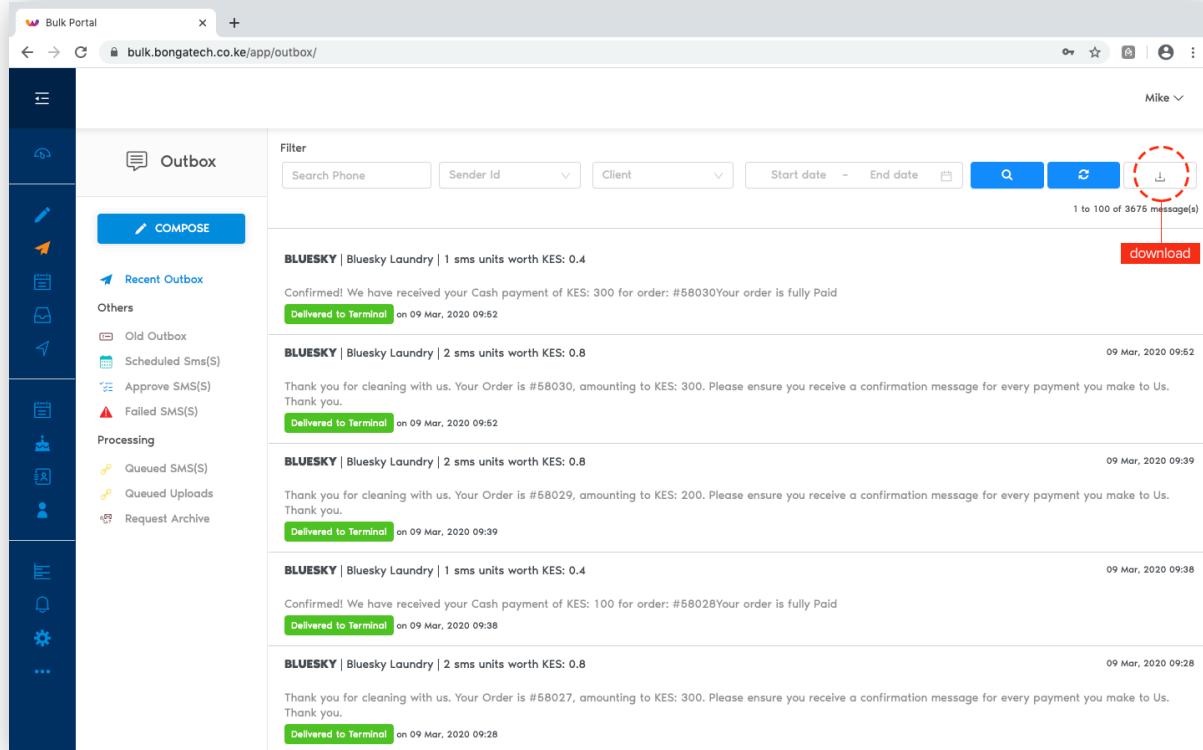


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## How to check failed sms

Sometimes a message may fail to deliver to terminal when:

- Your account does not have sufficient sms units
- When you did not put the correct number or it is invalid
- When you do not select a sender ID during compose sms

To check your failed sms, go to the outbox option and click on the failed sms option



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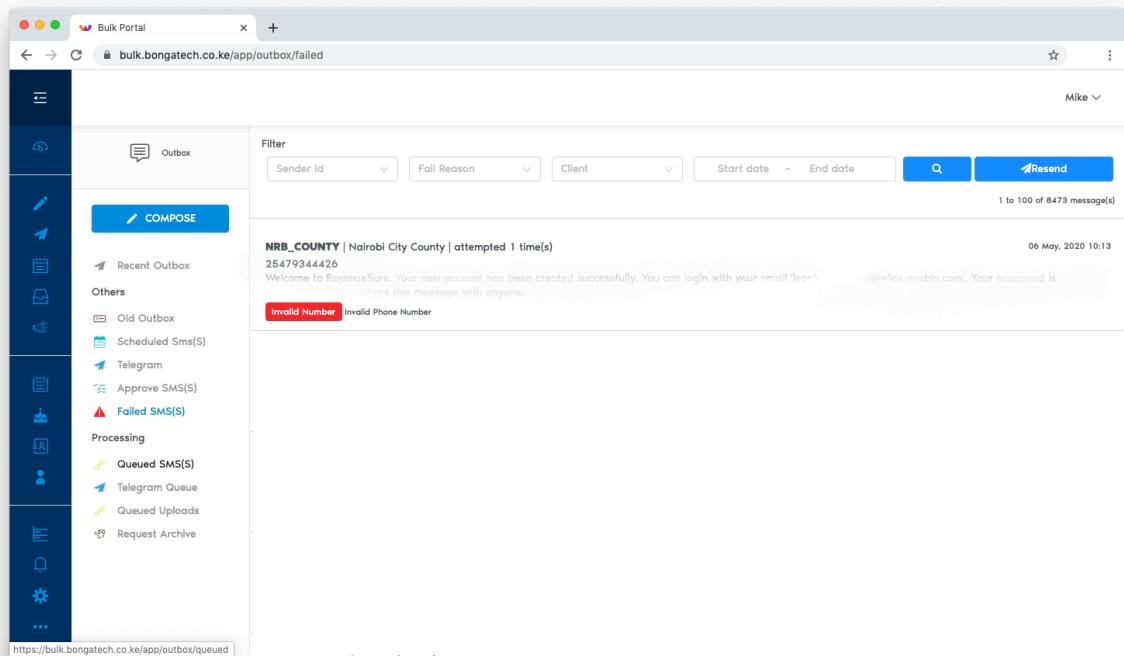


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Above is an example of an invalid phone number that has failed during termination.

### 3. Inbox

Under the inbox option is where you will see all two-way messages from your clients.



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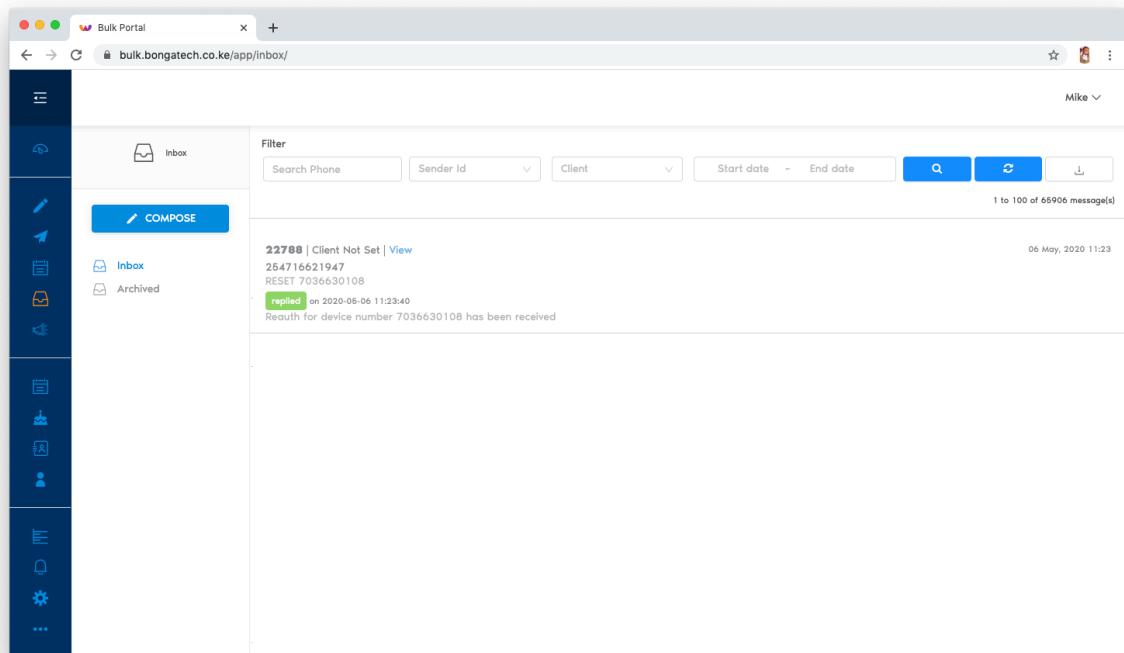


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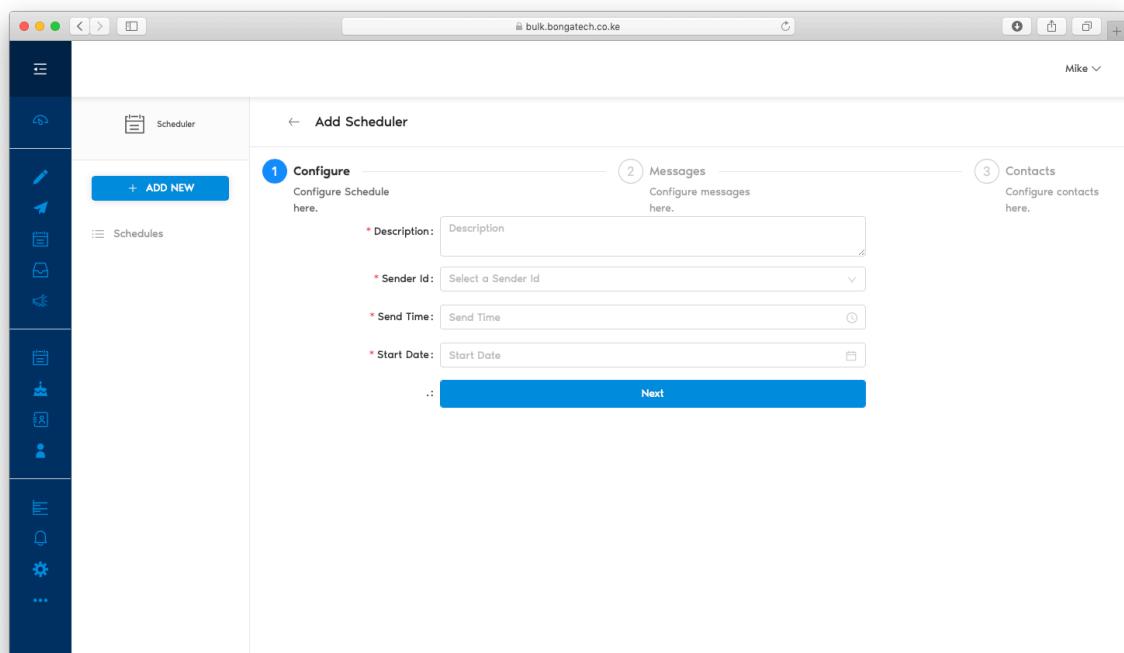
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## 4. Smart scheduler

With the smart scheduler, you can set a specific time and date to send your messages. To get started first select the smart scheduler from the sidebar menu. You will get a similar screen to this one.



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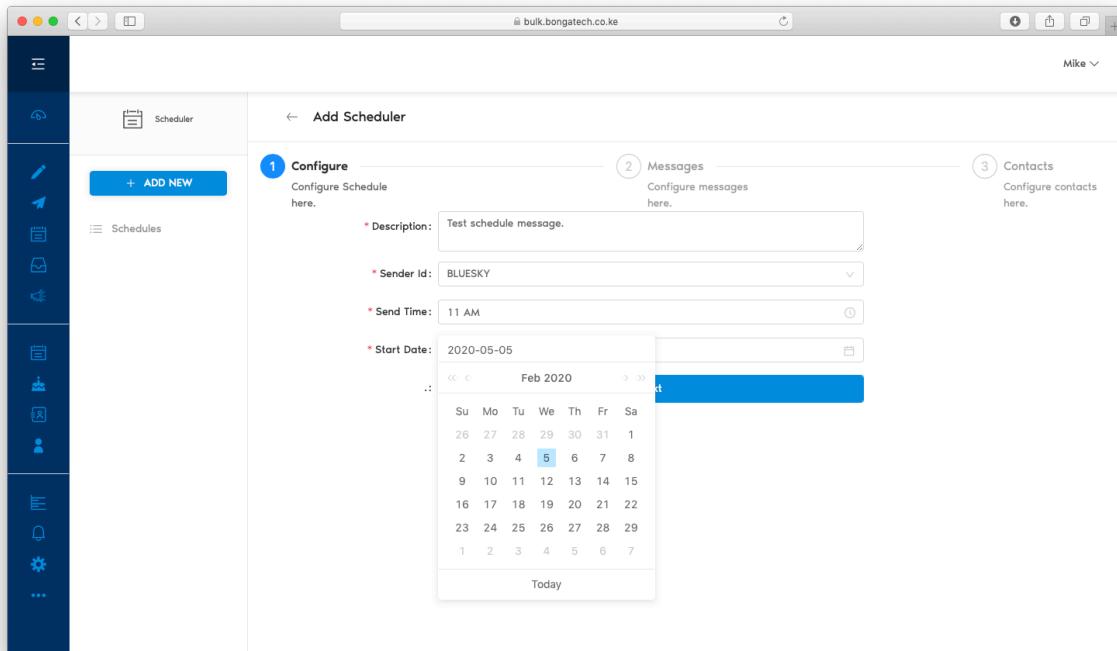
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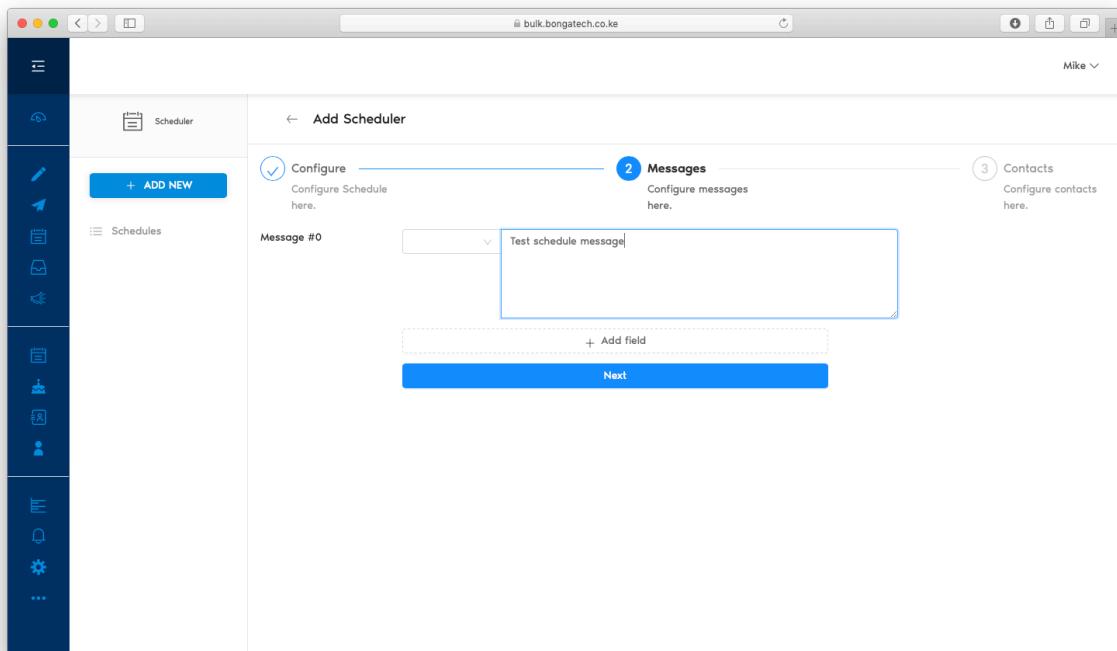
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We now have to configure our smart scheduler parameters. Follow the intuitive prompts to set the time and date like below.



After configuring, we can now set the message we intend to send on the set date.



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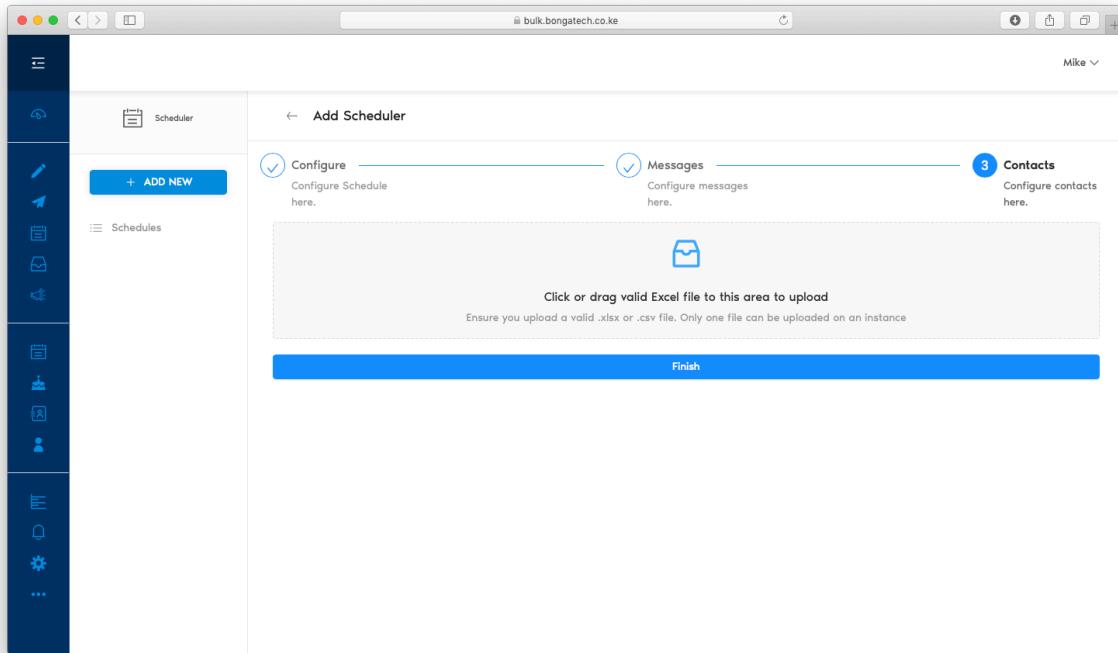


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Later on, we can now feed our contact list in the slot below.  
**Note: the contact list needs to either be in excel or csv format.**

After inputting the contacts, we are good to go and our message will be terminated at set time.



## 5. Surveys

Sometimes you may want to run a survey to get data based on a target clientele.



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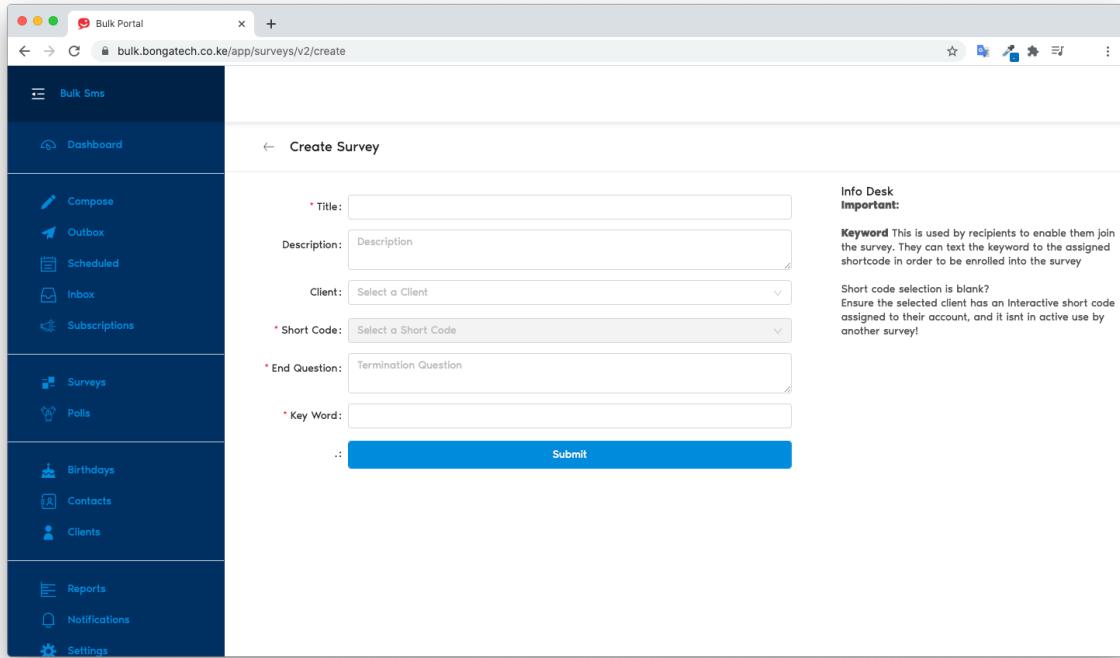


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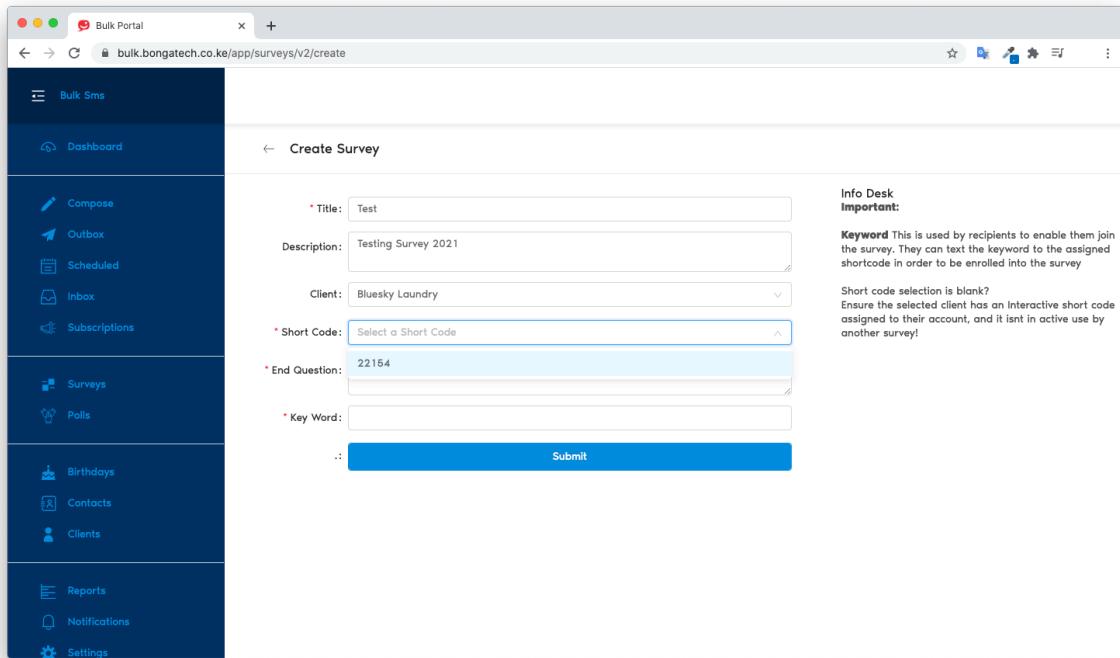
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The screenshot shows the 'Create Survey' form in the Bulk Portal. The left sidebar has a dark blue theme with various icons and labels: Bulk Sms, Dashboard, Compose, Outbox, Scheduled, Inbox, Subscriptions, Surveys (selected), Polls, Birthdays, Contacts, Clients, Reports, Notifications, and Settings. The main area is titled 'Create Survey' with a back arrow. It contains several input fields with validation stars: 'Title' (empty), 'Description' (empty), 'Client' (dropdown menu showing 'Select a Client'), 'Short Code' (dropdown menu showing 'Select a Short Code'), 'End Question' (empty), and 'Key Word' (empty). A large blue 'Submit' button is at the bottom. To the right of the form is an 'Info Desk' section with a bold 'Important:' header. It includes a note about the 'Keyword' field and another note about the 'Short code selection' being blank.

You can start a survey template by going to the actions tab and selecting create Survey option.  
 Please note that under this option, it is necessary to have a defined **short code** in order to proceed.



This screenshot shows the same 'Create Survey' form but with populated fields. The 'Title' field contains 'Test', 'Description' contains 'Testing Survey 2021', 'Client' is set to 'Bluesky Laundry', and 'End Question' is set to '22164'. The other fields ('Short Code' and 'Key Word') remain empty. The 'Info Desk' section on the right is identical to the first screenshot, providing instructions for the keyword and short code fields.



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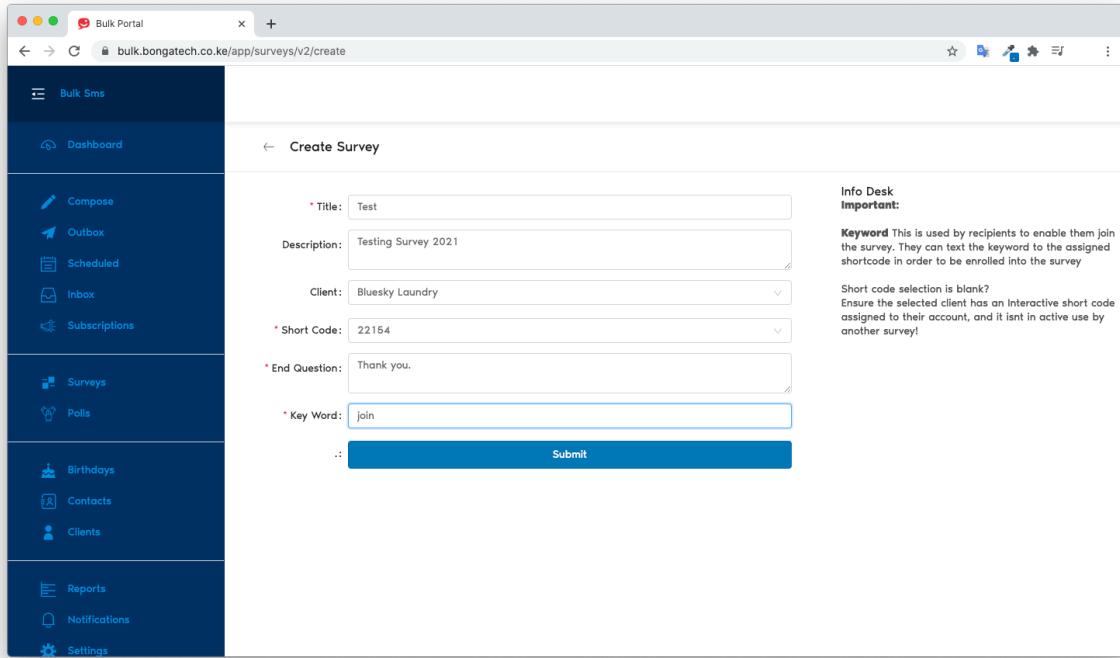


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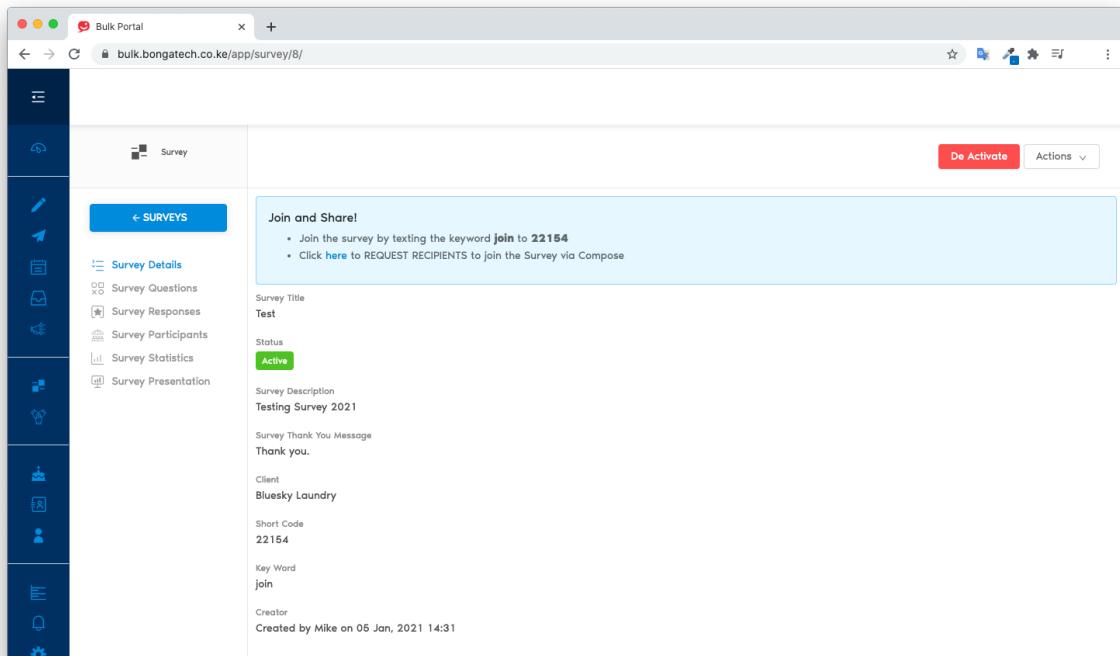
The screenshot shows the 'Create Survey' form in the Bulk Portal. The left sidebar has a dark blue theme with various icons and links: Bulk Sms, Dashboard, Compose, Outbox, Scheduled, Inbox, Subscriptions, Surveys (selected), Polls, Birthdays, Contacts, Clients, Reports, Notifications, and Settings. The main form area has a light blue header 'Create Survey'. It contains the following fields:

- Title: Test
- Description: Testing Survey 2021
- Client: Bluesky Laundry
- Short Code: 22154
- End Question: Thank you.
- Key Word: join

On the right, there's an 'Info Desk' section with a bold 'Important:' heading. It says: 'Keyword This is used by recipients to enable them join the survey. They can text the keyword to the assigned shortcode in order to be enrolled into the survey.' Below this, it says: 'Short code selection is blank? Ensure the selected client has an interactive short code assigned to their account, and it isn't inactive use by another survey!'

At the bottom right of the form is a large blue 'Submit' button.

Once you have finished setting up your survey template, you will be taken to a screen similar as below.



The screenshot shows the 'Survey Details' page for a survey titled 'Test'. The left sidebar has a dark blue theme with various icons and links: Survey (selected), Survey Details, Survey Questions, Survey Responses, Survey Participants, Survey Statistics, Survey Presentation, and others. The main form area has a light blue header 'Survey' and a red 'De Activate' button. It displays the following survey details:

- Join and Share!**
  - Join the survey by texting the keyword **join** to **22154**
  - Click [here](#) to REQUEST RECIPIENTS to join the Survey via Compose
- Survey Title:** Test
- Status:** Active
- Survey Description:** Testing Survey 2021
- Survey Thank You Message:** Thank you.
- Client:** Bluesky Laundry
- Short Code:** 22154
- Key Word:** join
- Creator:** Created by Mike on 05 Jan, 2021 14:31



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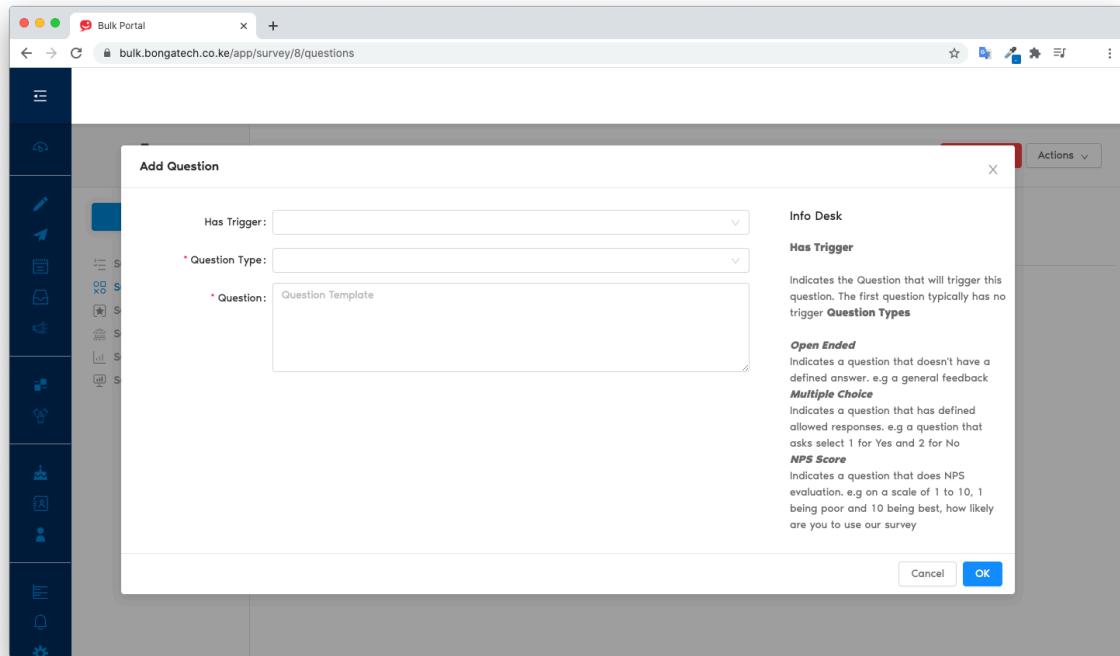


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When adding questions you will notice new parameters which we shall define below.

## Has Trigger

Indicates the Question that will trigger this question. The first question typically has no trigger **Question Types**

### **Open Ended**

Indicates a question that doesn't have a defined answer. e.g a general feedback

### **Multiple Choice**

Indicates a question that has defined allowed responses. e.g a question that asks select 1 for Yes and 2 for No

### **NPS Score**

Indicates a question that does NPS evaluation. e.g on a scale of 1 to 10, 1 being poor and 10 being best, how likely are you to use our survey



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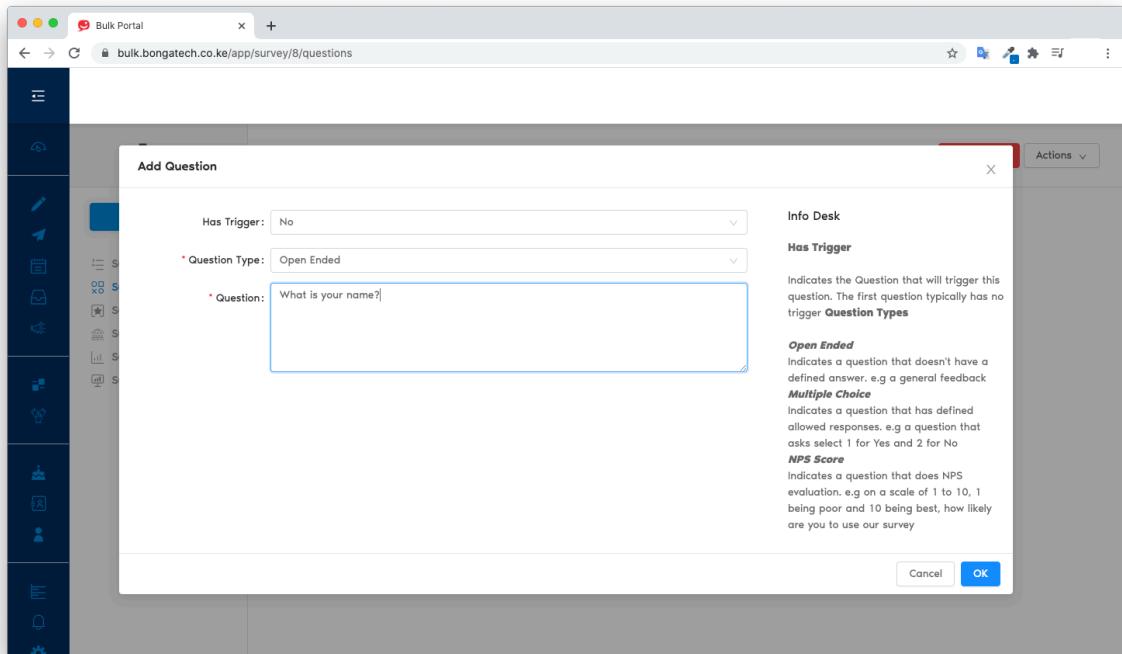
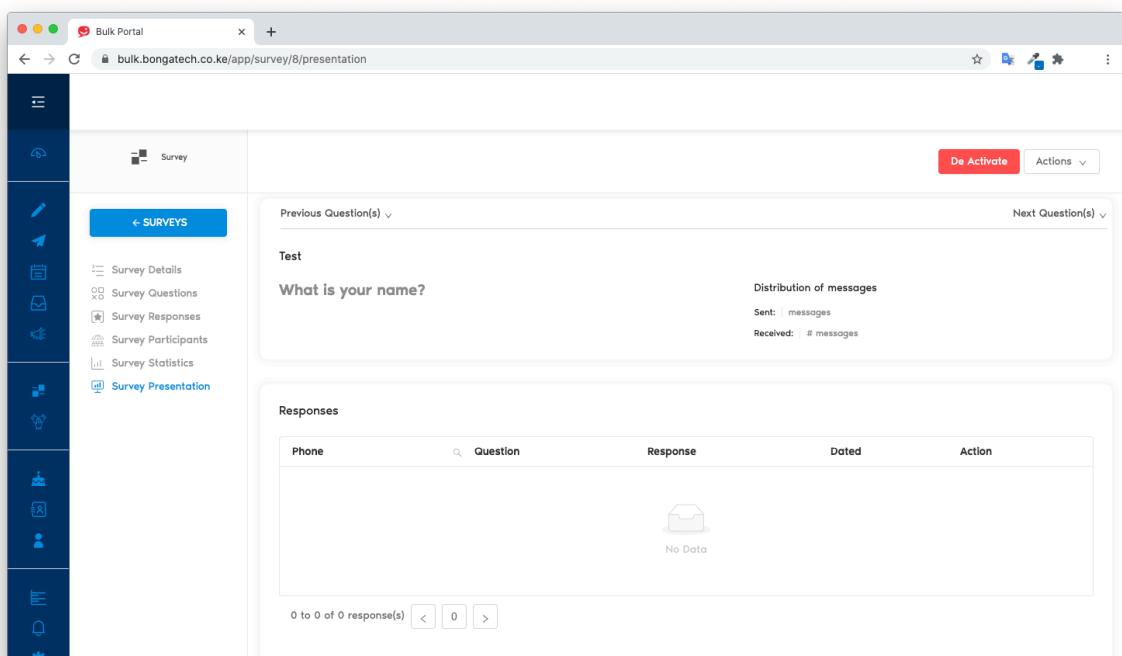


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**Survey**

**Test**

**What is your name?**

**Distribution of messages**

Sent: # messages  
Received: # messages

**Responses**

Phone	Question	Response	Dated	Action
No Data				

0 to 0 of 0 response(s) < 0 >

Because a survey is a two-way form of communication, all responses and participants data will be recorded for you to view.



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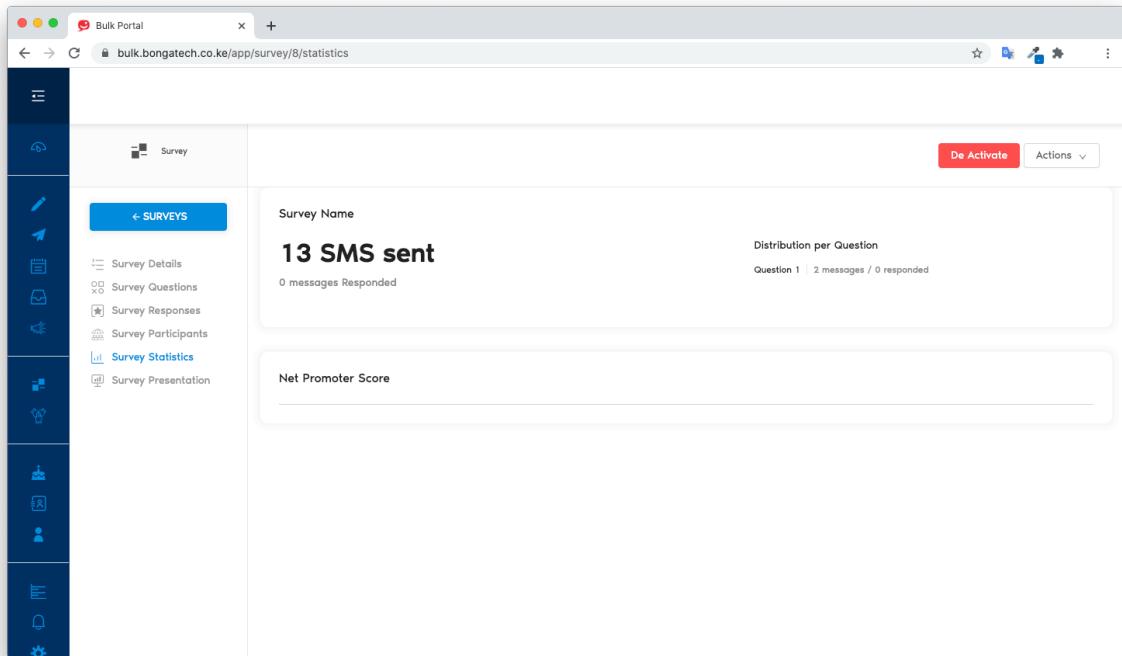


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The screenshot shows a web-based bulk messaging portal. The main header reads "Bulk Portal" and the URL is "bulk.bongatech.co.ke/app/survey/8/statistics". On the left, there's a vertical sidebar with icons for various functions: Survey (selected), SURVEYS (blue), Survey Details, Survey Questions, Survey Responses, Survey Participants, Survey Statistics (selected), and Survey Presentation. The main content area has a title "Survey Name" and a large bold text "13 SMS sent". Below it, it says "0 messages Responded". To the right, there's a section titled "Distribution per Question" with a single entry: "Question 1 | 2 messages / 0 responded". At the top right of the main content area are two buttons: "De Activate" and "Actions".

## 6. Birthdays

Under this option you can choose to surprise your clients and send them a happy birthday message. You can decide to enter the contact list into a form manually. Select the add contact to form option and you will be presented with a similar screen.



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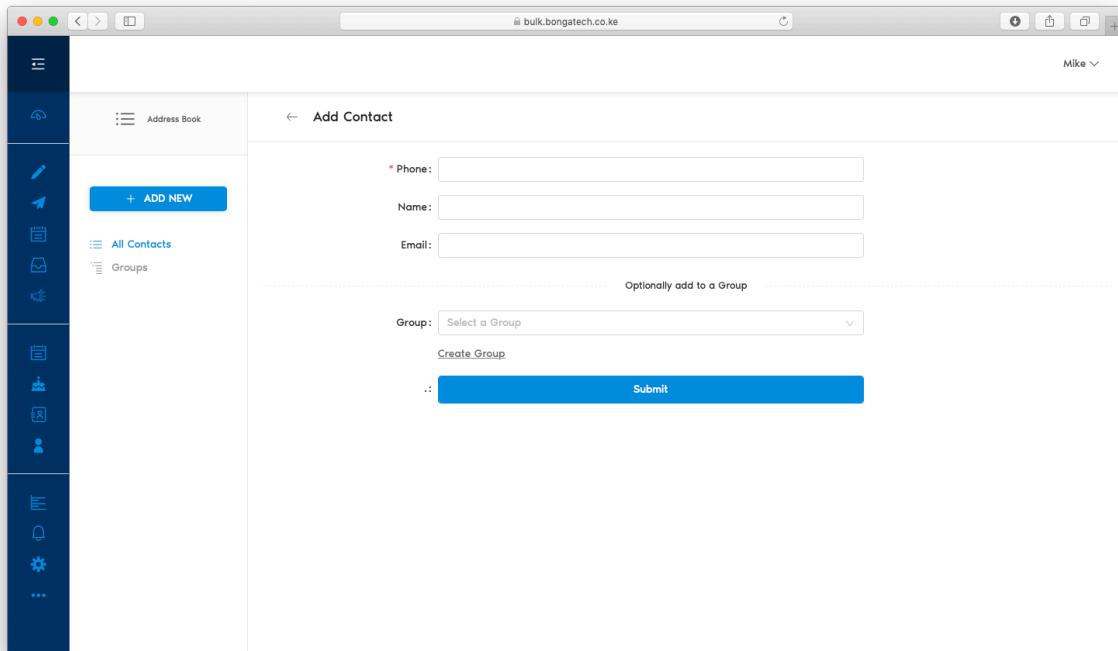


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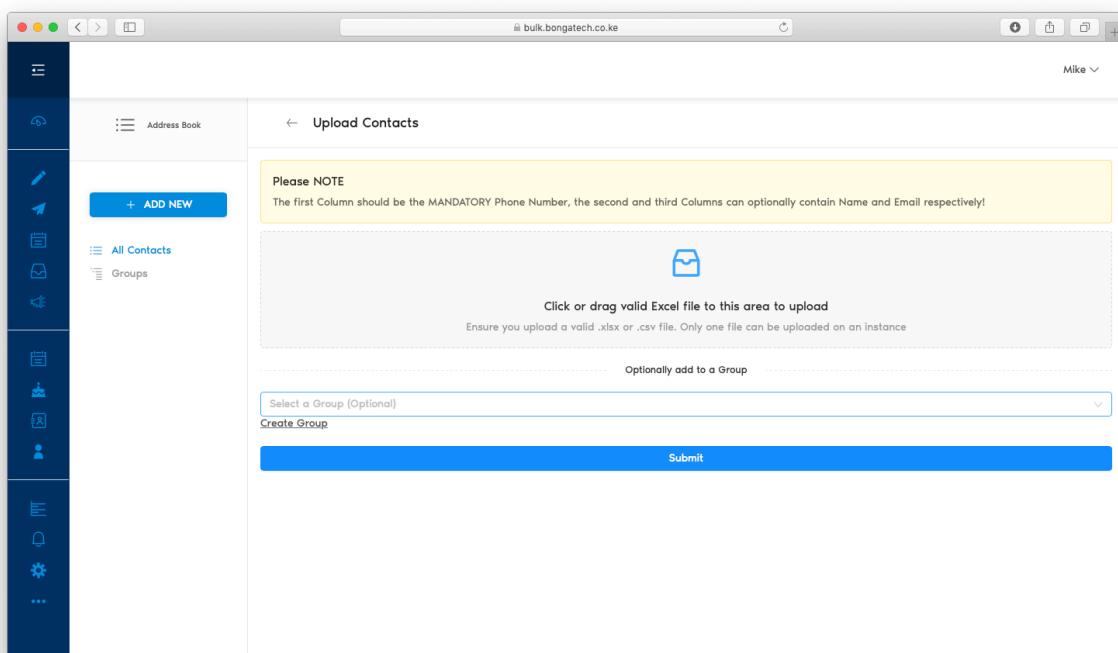
[www.bongatech.co.ke](http://www.bongatech.co.ke)





The screenshot shows the 'Add Contact' form in the Bonga Tech Address Book. The left sidebar has a dark blue theme with icons for Home, Address Book, All Contacts, Groups, and other functions. The main area has a light gray background. At the top right, it says 'bulk.bongatech.co.ke' and 'Mike'. The title 'Add Contact' is at the top left of the form. It contains three input fields: 'Phone:' (with a red asterisk), 'Name:', and 'Email:'. Below these is a section titled 'Optional add to a Group' with a dropdown menu 'Group: Select a Group' and a 'Create Group' link. At the bottom right is a large blue 'Submit' button.

You can also feed contacts by dropping a contact list.  
**Note: the contact list needs to either be in excel or csv format.**



The screenshot shows the 'Upload Contacts' form in the Bonga Tech Address Book. The left sidebar is identical to the previous screenshot. The main area has a light gray background. At the top right, it says 'bulk.bongatech.co.ke' and 'Mike'. The title 'Upload Contacts' is at the top left of the form. A yellow box contains the note: 'Please NOTE: The first Column should be the MANDATORY Phone Number, the second and third Columns can optionally contain Name and Email respectively!'. Below this is a large dashed rectangular area with a blue file icon and the text 'Click or drag valid Excel file to this area to upload. Ensure you upload a valid .xlsx or .csv file. Only one file can be uploaded on an instance'. At the bottom is a section titled 'Optional add to a Group' with a dropdown menu 'Select a Group (Optional)' and a 'Create Group' link. At the bottom right is a large blue 'Submit' button.



+254 (0) 202 100 835 or +254 (0) 710 282 777



Haven Court, Block B, 1st floor,  
Westlands Nairobi.



info@bongatech.co.ke



www.bongatech.co.ke

