ExtraTxt 2.1

Outlook Mobile Service (OMS)

May 2011

1 Outlook Mobile Service

With the mobile messaging functionality that is provided by ExtraTxt OMS, users can do the following:

- Compose new text messages within Outlook.
- Forward Outlook items (including e-mail messages, meetings, and contacts) as text messages.
- Receive replies from mobile devices and have two-way communication between Outlook and mobile phones.

With the ExtraTxt OMS and Outlook 2007 (or Outlook 2010), it is now as easy to send and receive text messages as it is to send and receive email. You do not need to install any software!

1.1 Requirement to use OMS

The following Outlook versions are supported:

- Outlook 2007
- Outlook 2010

1.2 OMS Message Flow (Outbound Only)

Flow for Outbound Message:



- 1. Carwash company sends a text message to a customer for picking up his car.
- 2. They compose a text message in the Outlook 2007/Outlook 2010 and submit the request to ExtraTxt.
- 3. ExtraTxt server sends the text message out.
- 4. The text message reaches the customer's mobile phone.

1.3 OMS Message Flow (2-way communication)

Flow for Outbound Message:



- 1. John Doe postponed the meeting and he asks Mary whether the new meeting time is ok.
- 2. He composes a text message in his Outlook 2007.
- 3. He submits the request to ExtraTxt (Note: The sender ID "+14158888001" of the text message is his dedicated number).
- 4. ExtraTxt sends the text message out.
- 5. The message arrives at Mary's mobile phone.

Flow for Reply Message:



Outlook 2010

- 1. Mary receives John Doe's text message.
- 2. She presses "Reply" button, inputs "It is ok for me." and presses "Send" button to send her reply out.
- 3. ExtraTxt receives Mary's message.
- 4. ExtraTxt found that the recipient address "+14158888001" is John Doe 's dedicated number. As a result, ExtraTxt routes the text message through email to John Doe's email address.
- 5. John Doe got the reply message from his Outlook 2007.

1.4 How Administrators Configure OMS?

To configure ExtraTxt OMS, administrators need to:

- Configure SSL certificate of ExtraTxt server as Outlook communicates with ExtraTxt through HTTPS.
- Setup user's mobile phone number/dedicated number:
 - Setup user's mobile number in the user account as user can choose his mobile number as the sender ID of outgoing text message. In this case, recipient will reply to the user's mobile phone.
 - Setup user's dedicated number in the user account as user can choose his dedicated number as the sender ID of outgoing text message. In this case, recipient will reply to ExtraTxt and ExtraTxt can forward the reply message to user's email address (and also user's mobile phone). This allows user to view the reply message from the Outlook Inbox and makes two-way communication possible between Outlook and mobile phones. (Note: If you are using GSM modem, the SIM card phone number of the modem corresponds to a dedicated number. If you are using SMPP, you can enquire your SMPP service provide for the purchase of dedicated numbers. Note that a dedicated number can be assigned to ONE user only and it cannot be shared.)

1.4.1 Configuring SSL Certificate of ExtraTxt Server

As the communication between Outlook and ExtraTxt server is made through HTTPS, administrators need to configure the SSL certificate correctly in the ExtraTxt server. (Note that both self-signed certificate and certificate from a trusted CA (e.g. VeriSign) can be used.)

Please check:

- The "Issue to" field in the SSL certificate must match the host name of ExtraTxt server.
- The validity period of the certificate is still valid.
- For self-signed certificate, the certificate must be trusted explicitly by the end user. (So user needs to install the certificate to his desktop machine.)

Certificate
General Details Certification Path
Certificate Information
This CA Root certificate is not trusted. To enable trust, install this certificate in the Trusted Root Certification Authorities store.
Issued to: sms.mycompany.com
Issued by: sms.mycompany.com
Valid from 12/ 22/ 2010 to 12/ 18/ 2025
Install Certificate) Issuer Statement
ОК

Configure the Host Name of ExtraTxt Server

- 1. Open your web browser and login ExtraTxt as administrator.
- 2. Go to System Management → System Configuration.
- 3. Click Edit button.
- 4. Change the **Server Host Name** (e.g. sms.mycompany.com).
- 5. Click **Save** button to save the change.

Generate and Deploy SSL Certificate (For Self-Signed Certificate)

For self-signed certificate, administrators can click the link in the **System Configuration** page to generate the self-signed certificate according to the **Server Host Name**.

- 1. Go to **System Management → System Configuration**.
- 2. Go to General Information \rightarrow SSL Certificate.
- 3. Click **Generate and Deploy Self-Signed Certificate** to generate and install the certificate at

the ExtraTxt server. (Note: This action will restart the Apache web server and it will disconnect all users.)

4. Click **View Certificate** to view the generated certificate.

Generate and Deploy SSL Certificate (For Certificate from a Trusted CA (e.g. VeriSign))

In this case, administrators need to manually replace the certificate files in the ExtraTxt server.

- 1. Prepare your certificate file and certificate key file at a shared folder of your Windows machine. The certificate file name must be **server.crt** and the certificate key file name must be **server.key**.
- Use SSH to login to ExtraTxt as "administrator". (The default password is "extratxt".) You may download SSH client "PuTTY" from http://www.putty.org/.
- 3. Run the following commands to enter super user mode:
 - a. sudo su
- 4. Backup the original certificate file and certificate key file:
 - a. cd /opt/extratxt/etc
 - b. cp server.crt server.crt.bak
 - c. cp server.key server.key.bak
- 5. Stop Apache web server:
 - a. /etc/init.d/apache2 stop
- Mount a Linux folder from the VM to the shared folder of your Windows machine that stores the new certificate files. (The following example supposes "\\10.0.1.123\Public" is the Windows shared folder and the user name is "John Doe".)
 - a. mkdir /tmp/share
 - b. mount //10.0.1.123/Public /tmp/share --option="username=John Doe"
- 7. Replace the certificate file and certificate key file with the new file:
 - a. cd /opt/extratxt/etc
 - b. cp /tmp/share/server.crt .
 - c. cp /tmp/share/server.key .
- 8. Start Apache web server:
 - a. /etc/init.d/apache2 start
- 9. Go to System Management → System Configuration.
- 10. Go to General Information → SSL Certificate.
- 11. Click **View Certificate** to view the installed certificate.
- 12. Done.

Configure Domain Name in the DNS Server

1. In the DNS server, you need to add a host record for the host name of ExtraTxt Server (e.g. sms.mycompany.com) so that Outlook can resolve the host name when it connects to ExtraTxt server according to the "Web Service Address" in the account settings.

Outlook Mobile Service Ac	count		? 🛛
Account Settings			
Complete each step to create	e and activate your text messagin	g account.	
Step1: Sign up with a tex Text messages are sen charges from your mob setup. Find a text mes Step2: Fill in account info	At messaging service provide t through a third-party service th le operator. You can review the t saging service for your mobile op prmation	:r at may charge you a fee that is sepa erms and any associated charges be <u>erator.</u>	rate from the fore completing
Service Provider URL:	https://sms.mycompany.com/or		
User ID:	johndoe,@gmail.com		
Password:	****		
	Remember password		
	Iest Account Settings		More Settings
			OK Cancel

1.4.2 Setup User's Mobile Phone Number/Dedicated Number

The sender ID of outgoing message determines how the recipient replies the text message. In ExtraTxt, user can choose his mobile number or his dedicated number as the sender ID.

Use User's Mobile Number as the Sender ID

If the user chooses his mobile number as the sender ID, the recipient will reply directly to his mobile number.

Use User's Dedicated Number as the Sender ID

If the user chooses his dedicated number as the sender ID, the recipient will reply to the dedicated number and ExtraTxt server will receive the reply message. In this case, ExtraTxt can forward the message to user's email address and mobile phones according to the user account settings. If the reply message is forwarded to user's email address, user can view the reply message from his Outlook. (Note: If you are using GSM modem, the SIM card phone number of the modem corresponds to a dedicated number. If you are using SMPP, you can enquire your SMPP service provide for the purchase of dedicated numbers. Note that a dedicated number can be assigned to **ONE** user only and it cannot be shared.)

As a result, administrators need to configure user's mobile number and dedicated number correctly.

To configure user's mobile number and dedicated number:

- 1. Login to ExtraTxt.
- 2. Go to User Management → User Accounts.
- 3. Select the user and click Edit button.
- 4. In the Mobile Phone, Dedicated Number fields, input the information for the user.
- 5. Click **Save** button.

Also, administrators can select the sender IDs for users. The following table describes different sender ID options.

SMS-Text Message Sender ID	
Use default sender ID of the device	Don't set the sender ID and follow the sender ID of the device.
Use one of the following sender IDs	Use one of the sender IDs which are defined by administrators in
	the system. This is generally used for sender ID branding.
User's Mobile Number	Use the user's mobile number as sender ID. Recipient will reply
	text message directly to the user's mobile phone.
User's Dedicated Number	Use the user's dedicated number as sender ID. Reply message
	from recipient will arrive ExtraTxt and ExtraTxt will forward the
	reply message to user's email addresses and mobile phones.

1.5 How End Users setup OMS?

The setup consists of three steps:

- i. Configure your User Settings in ExtraTxt.
- ii. Install SSL Certificate to your desktop machine(Only needed if the certificate in the ExtraTxt server is a self-signed certificate. Skip this step if the certificate comes from a trusted CA (e.g. VeriSign))
- iii. Add account information in your Outlook.

Step 1: Configure User Settings in ExtraTxt

- 1. Open web browser and login to ExtraTxt.
- 2. Click **Settings** to enter the User Settings page.

Welcome, John Doe | Settings | Sign out

- 3. Click **Edit** button.
- 4. In the SMS-Text Message Sender ID section,
 - If you want the recipient to reply to **your mobile phone** directly, select **Your Mobile Number** as the sender ID. (In this case, your mobile number cannot be empty.)

Your Mobile Number - Use your Mobile Number as the sender ID. Receipient replies directly to your mobile number.

- OR, if you want the recipient to reply to **your ExtraTxt account**, select **Your Dedicated Number** as the sender ID. (In this case, your dedicated number cannot be empty.)
 - If you need ExtraTxt to forward the reply message to your email, select the checkbox "Email addresses" and input your email address in the text box. address (You need to select this option if you want to view reply messages in the Outlook)
 - If you need ExtraTxt to forward the reply message to your mobile phone, select the checkbox "Mobile numbers" and input your mobile number in the text box.

Z Email address(es)	
johndoe2011a@gmail.com	*
	-
(for example: staff1@mycompany.com, staff1@my	company.com)
Mobile number(s)	
	*
	-

5. Click **Save** button to save the changes.

Step 2: Install SSL certificate to your desktop machine (Required for self-signed certificate only) (Note: Skip this step if the certificate comes from a trusted CA (e.g. VeriSign). This step is needed if the certificate in the ExtraTxt server is a self-signed certificate.)

- 1. From your desktop machine, open the web browser and login ExtraTxt.
- 2. Click Settings.

```
Welcome, John Doe | Settings | Sign out
```

- 3. Go to the **Outlook Mobile Service** section.
- 4. Click the link **Click here to install the SSL certificate** to install the certificate.

Outlook Mobile Service	
Signature Text:	
Place signature at:	Prepend signature at the top of message(s)
Configure Outlook:	1. Make sure that Outlook 2007 or 2010 was installed.
	2. Click here to install SSL certificate.
	3. Click here to configure your Outlook.
	4. Click Yes button.
	5. Enter your password and click OK button.
	6. The configuration is complete. Please restart you Outlook for the changes to take effect.

5. Click **Open** button for the following dialog.

File Down	load - Security Warning
Do you	ı want to open or save this file?
	Name: server.crt Type: Security Certificate, 822 bytes From: 10.0.1.107 Open <u>S</u> ave Cancel
۲	While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open or save this software. <u>What's the risk?</u>

6. Click **Allow** button from the following dialog.



7. Click **Install Certificate** button to install the certificate to your desktop machine.



8. The following dialog will be opened. Click **Open** button.



9. Select Place all certificates in the following store and click Browse button.



10. Select **Trusted Root Certification Authorities**.



11. Click **Next** button.



12. Click **Finish** button.

Certificate Import Wizard		×
	Completing the Certifi Wizard	cate Import
	The certificate will be imported after	you click Finish.
	You have specified the following set	tings:
	Certificate Store Selected by User Content	Trusted Root Certifica Certificate
	۲. III	•
	< Back F	inish Cancel

13. Click **Yes** to install the certificate.



14. Certificate was installed successfully to your desktop machine.



Step 3: Add account information in your Outlook

1. Make sure that Outlook 2007 or Outlook 2010 has been installed in your machine.



3. Click **New...** button to add an email account in your Outlook.

Account Settings						×
E-mail Accounts You can add or remove an	account. You can s	select an account ar	nd change	its settings.		
E-mail Data Files RSS Feeds	SharePoint Lists	Internet Calendars	s Publishe	ed Calendars	Address Books	
∑ New ★ Repair ■	Ch <u>a</u> nge 🔗 S	iet as <u>D</u> efault 🗙	Re <u>m</u> ove	+ +		
Name		Туре				
					_	
					<u>_</u>	lose

4. Input the required information for your email account and click **Next** button.

Add New Account		×
Auto Account Setu Click Next to conn	p eect to the mail server and automatically configure your account settings.	ь. 5
⊙ E-mail <u>A</u> ccount		
Your Name:	John Doe	
	Example: Ellen Adams	
E-mail Address:	jdoe201209@gmail.com	
-	Example: ellen@contoso.com	
Password:	*****	
– Retype Password:	*****	
	Type the password your Internet service provider has given you.	
○ Te <u>x</u> t Messaging (○ Manually configu	'SMS) re server settings or additional server types	
<u>, susan</u> , comigu		
	< <u>B</u> ack <u>N</u> ext > Cancel	ן

5. After Outlook has configured your email account, click **Finish** button.

Add New Acc	ount 🛛
Online sear	ch for your server settings
Configuring	
Configuring	e-mail server settings. This might take several minutes:
×	Establish network connection
	Search for jdoe201209@gmail.com server settings
	Log on to server
	Carrel

6. And you can see your email account was added.

Account Settings	\mathbf{X}
E-mail Accounts You can add or remove an account. You can select an account	and change its settings.
E-mail Data Files RSS Feeds SharePoint Lists Internet Calence	ars Published Calendars Address Books
Name Type	
✓ idoe201209@gmail.com	TP (send from this account by default)
Selected account delivers new messages to the following location:	
jdoe201209@gmail.com\Inbox	
in data file C:\Documents and Settings\\Outk	ook\jdoe201209@gmail.com.pst
	⊆lose

7. Click **New...** button again to add the OMS account in your Outlook. Select **Text Messaging (SMS)**.

Add New Account		
Auto Account Setup Send and receive t	ext messages (SMS) and multimedia messages (MMS) through a text messaging service provider.	$\langle \langle \rangle$
○E-mail <u>A</u> ccount		
Your Name:	Example: Ellen Adams	
E-mail Address:	Example: ellen@contoso.com	
<u>P</u> assword: Re <u>t</u> ype Password:		
	Type the password your Internet service provider has given you,	
• Text Messaging (<u>M5)</u>	
○ <u>M</u> anually configur	e server settings or additional server types	
	< Back Next > C	ancel

8. Click **Next** button.

9. In the Web Service Address, input https://<your server host name>/oms/api (e.g. https://sms.mycompany.com/oms/api).

In the Logon Information, input your ExtraTxt login name (that is your email address in ExtraTxt) and password.

Outlook Mobile Service Ad	count		? 🔀
Account Settings			
Complete each step to create	; and activate your text messaging	g account.	
Step1: Sign up with a tex Text messages are sen charges from your mob setup. Find a text mes Step2: Fill in account info	It messaging service provide t through a third-party service tha le operator. You can review the to saging service for your mobile ope prmation	r It may charge you a fee that is separate fron rrms and any associated charges before com rator.	ו the pleting
Service Provider URL:	https://sms.mycompany.com/or		
<u>U</u> ser ID:	johndoe,@gmail.com		
Password:	****		
	Remember password		
	Test Account Settings	More	Settings
		ОК	Cancel

10. Click More Settings....

11. Choose a name for this OMS account such as **ExtraTxt OMS**, input your mobile number and click **OK**.

Outlook Mobile Service Information and Settings 🛛 🛜	<
Configure Service Options	
Account Name	
Type the <u>n</u> ame by which you want to refer to this account. For example: "Work" or "Text Message Service"	
ExtraTxt OMS	
Service Information	
Service Provider: Extracomm Inc.	
Service Name: ExtraTxt OMS Service	
Log-in to the service provider site to configure additional settings such as your reply-to address	
Other User Information	
Your Phone Number: +14158888999	
OK Cancel)

12. Click **Test Account Settings...** button to test the account settings.

13. Click **Yes** to send a test message to your mobile phone.

	Microsoft Outlook
	Test Account Settings was done successfully. Do you want to send a test message to your mobile phone?
1	4. A test message was sent to your mobile phone.

Microsoft	i Outlook 🛛 🚺
(j)	A test message was sent to your mobile phone.
	OK

1.6 How to send and receive Text Message from Outlook?



2. Input the mobile number of your recipient in the **To** field and then input your message content. You can input multiple recipients by separating the mobile numbers by ";" in the **To** field. You can also select contacts from your Outlook address book.

🔝 🛃 🍠 (थे 🔶 🔶 두	U	Intitled - Text M	essage	- 0 %
File Text Message				۵ 🕜
Paste & Cut Paste Ø Format Painter Clipboard	:-) :-D :-O :-P Insert	Address Check Book Names Names	Coptions	Zoom Zoom
Send To +1415	at OMS 88888002			
Preview Image:	The meetin John Doe	g will be postpoi	ned to tomorrow 0730pm. Is it of	< for you?

3. Click **Send** button to send the text message.

4. If you want to see any reply message has been received, click **Send/Receive** button at the toolbar. (Note: To receive text messages in the Outlook, you need to use Dedicated Number as sender ID and forward reply message to your email address in the User Settings of ExtraTxt.)

5. And then you can see any reply messages from your Inbox.



7. You can also reply or forward the text message by clicking **Reply**, **Reply to All**, or **Forward** button from the toolbar.



1.7 Alerts and Reminders

You can also configure Outlook to:

- Send a calendar summary as text messages to your mobile phone.
- Get reminders as text messages to your mobile phone.
- Forward Outlook items as text messages to your mobile phone.

To configure the alerts and reminders, select **File → Options** and select **Mobile** in the left pane.

Outlook Options		? 🔀
General Mail	Change the settings for items sent to a mobile device.	
Calendar	Calendar summaries	
Contacts	Send a summary of your schedule to a mobile device	<u>Calendar Summary Settings</u>
Tasks	Reminders	
Notes and Journal Search	Get reminders on a mobile device	Mobile Remin <u>d</u> er Settings
Mobile	Forward Outlook items	
Language	Forward Outlook items to a mobile device	Configure <u>F</u> orwarding
Advanced	Mobile options	
Customize Ribbon Quick Access Toolbar	Configure options for mobile messaging	Mobile Options
Add-Ins		
Trust Center		

Send a calendar summary as text messages to your mobile phone:

Calendar Summary
Calendar Summary Send a calendar summary as text messages (SMS) or multimedia messages (MMS) to a mobile device. Send a calendar summary to a mobile device Enter metally summary to a mobile device
Number of hours to send calendar summary from starting send time: 24 V Send every day at 5:00 PM V
 Exclude all day events Exclude all weekend appointments and meeting requests Only include events occurring in working hours
Send one text message (SMS) or multimedia messages (MMS) for each appointment or meeting request OK Cancel

Get reminders as text messages to your mobile phone :

Reminder	? 🔀
Reminder Send reminders as text message (MMS) to a mobile device.	ges (SMS) or multimedia messages
Send reminders	
Enter mobile number:	+14158888999
When my name is:	The only one in the To box 💌
Items with <u>c</u> ategory	/: Red Category 💉
ОК	Cancel Apply

Forward Outlook items as text messages to your mobile phone:

Mobile Notification
Mobile Notification Forward incoming Outlook items as text messages (SMS) or multimedia messages (MMS) to a mobile device.
Forward to mobile numbers: +14158888999
Meeting requests and updates
When my name is: The only one in the To box
From people or a public group: Select
With specific words in the message subject:
Marked as high importance
OK Cancel Apply

1.8 References

http://msdn.microsoft.com/en-us/library/bb277361.aspx http://www.living-with-outlook.com/outlook-mobile-service.html