Market Leading Loan Management Software

finPOWER Connect – ClickSend

Installation and Processing Guide

Version 2.00

17th September 2026

Contents

Disclaimer

finPOWER Connect includes functionality to cater for **ClickSend**, an SMS Messaging service.
As per your Software License Agreement, it is your responsibility to make sure finPOWER Connect is fit for your purposes and you should seek independent professional advice from sources such as Lawyers, Accountants and Government Agencies.

This is a guideline only. It is not intended to be definitive and should not be used in place of legal advice. You are responsible for staying up to date with legislative changes.

Please note: not all functionality is available in all versions of finPOWER Connect (particularly older versions) or all Countries. We suggest you search the Intersoft Knowledge Base for updates and information:
https://www.intersoft.co.nz/Support/Kb.aspx

Revision History

Date	Version	By	Details
17/10/2024	1.00	AC	Created
30/11/2024	1.01	AC	Update according to whether the User has Messaging or Advanced Messaging.
16/04/2025	1.02	AC	Update format
17/09/2026	2.00	AC	Update format

Overview

This document covers the setup and configuration of **ClickSend** within finPOWER Connect including the 'Messaging Interface'.

The 'SMS Interface' consists of the Messaging Add-On and the Advance Messaging services, which are fully integrated into Cost Centres. This means you can easily analyse SMS costs back to your business units. It allows you to specify the Branch (and therefore Cost Centre) and Service, which will default based on the Account, Account Application, Client, External Party, or User.

ClickSend is available in both Australian and New Zealand databases within Cost Centres.

For more information, please go to the **ClickSend** sites:

- https://www.clicksend.com/nz/
- https://www.clicksend.com/au/

Licence Requirements

There are two different licensing options for ClickSend, depending on your requirements:

Messaging:

- User Account is an Intersoft Systems configured 'sub-account',
- Intersoft Systems Bills the User,
- User will be given an encrypted API Key and one dedicated Number to send texts from,
- Replies supported via email only,
- No Delivery Receipts are available.

Advanced Messaging:

- User creates own ClickSend Account,
- Can support Delivery Receipts/Replies via an API,
- User is billed directly from ClickSend,
- Web Services and Automation is also required.

Additional Information

In New Zealand, all marketing messages must comply with all NZ Privacy and Spam Legislation; it is your responsibility to ensure that you comply with these rules.

Messaging Interface

If your account is being hosted through Intersoft, you need to contact your Intersoft Dealer, or Intersoft Systems admin admin@intersoft.co.nz requesting an Account. They will send you an SMS Agreement to sign, and once signed will set up the Account and send the following:

- Username,
- Encrypted API Key and
- Dedicated Number.

Configuration

Setting up an Account for ClickSend

Messaging Add-On

If you have previously used ClickSend, and are moving to use via the Cost Centres, then your 'Username' remains the same, however you must contact Admin admin@intersoft.co.nz at Intersoft for an encrypted password.

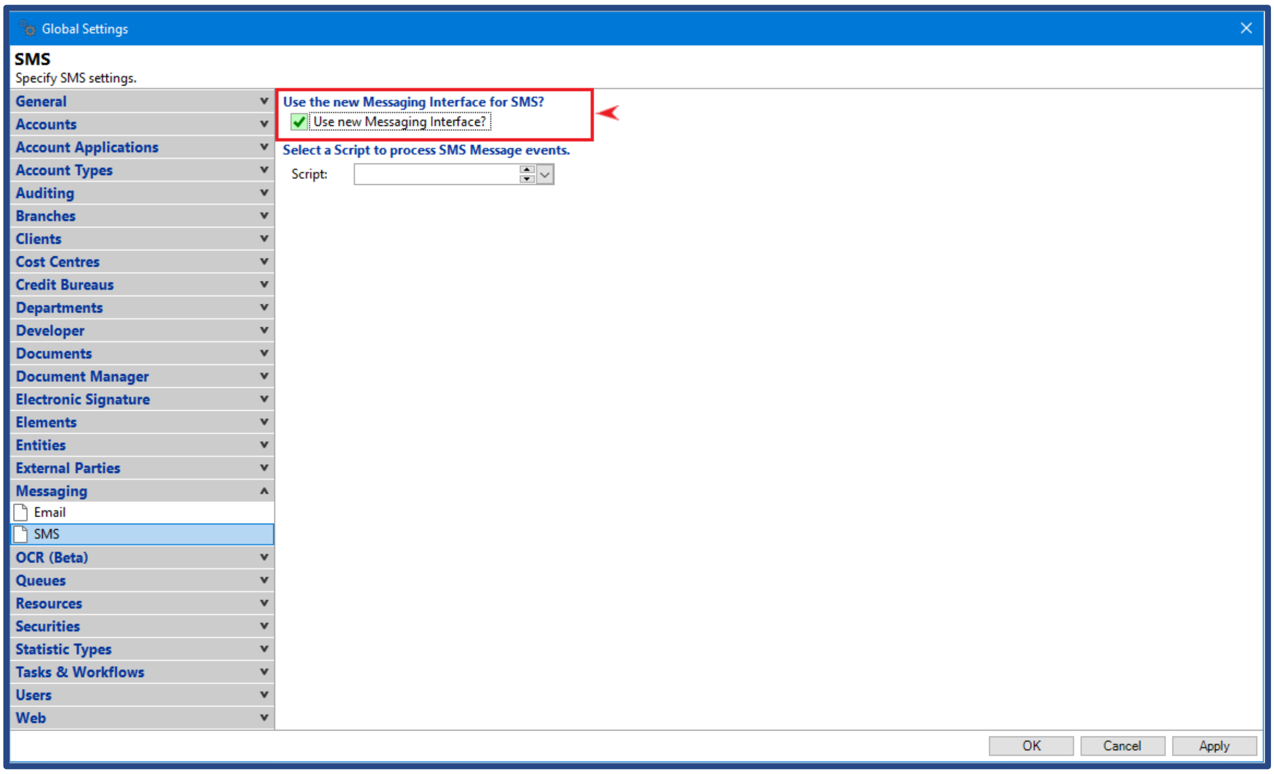
Please also contact admin@intersoft.co.nz at Intersoft for a new Account if you are signing up.

Advanced Messaging Add-On

If on the other hand you are setting up a new Account direct with ClickSend, then please send your password to admin@intersoft.co.nz so that it can be encrypted.

Global Settings

To use the functionality from Cost Centres, a checkbox is in Global Settings that **must be** ticked. Go to menu option Tools, Global Settings, Messaging, SMS page. Tick the **Use new Messaging Interface** checkbox; **ClickSend** will now appear within the Cost Centre.



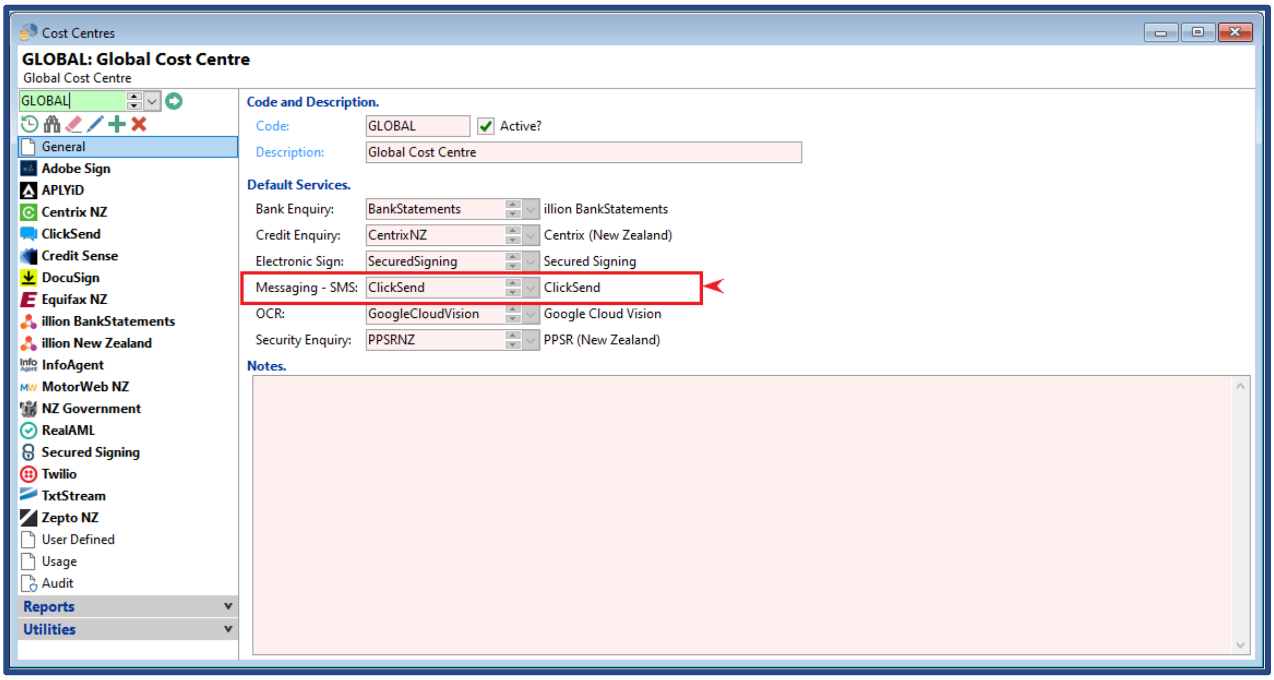
Once ticked an additional setting within Global Settings will appear to allow a customised Script to be added to process 'SMS Message' events, if required.

Cost Centres

Go to menu option Admin, Cost Centres and select GLOBAL from the top left drop-down list. If you are using other Cost Centres, then set these up as appropriate.

General Page

The Cost Centres **General** page allows you to select providers to use as your **Default Services** for example, ‘Click Send’ for SMS.



Next to **Messaging – SMS** select ‘ClickSend’ from the dropdown list.

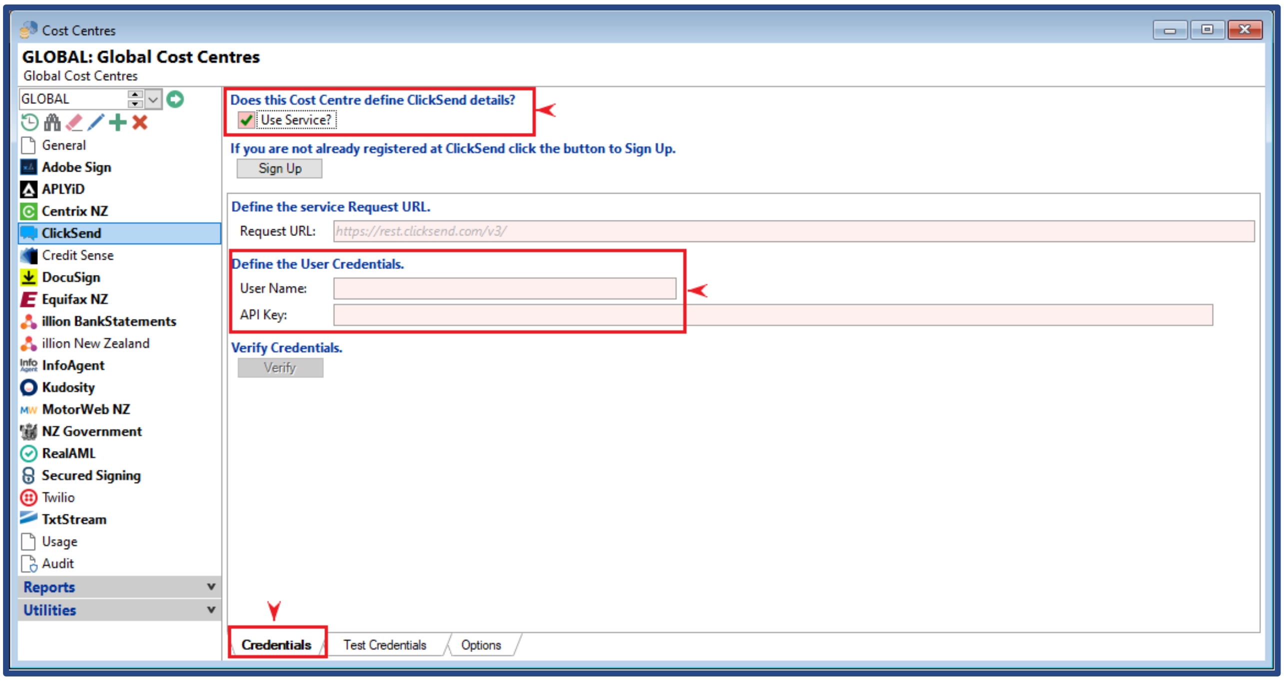
If using an SMS document as part of a Workflow, then the above field **must** be set.

Please note: if ClickSend is the only service you are using and if you do not set this as the default, then in some circumstances the dropdown lists for SMS will not be populated e.g., when sending an SMS from an Account.

Credentials Tab

The following describes how to set up **ClickSend** within finPOWER Connect, Cost Centres.

1. Click on the **ClickSend** page.
2. At the top of the page under the section, **Does this Cost Centre define ClickSend details**, tick the **Use Service** checkbox to confirm.

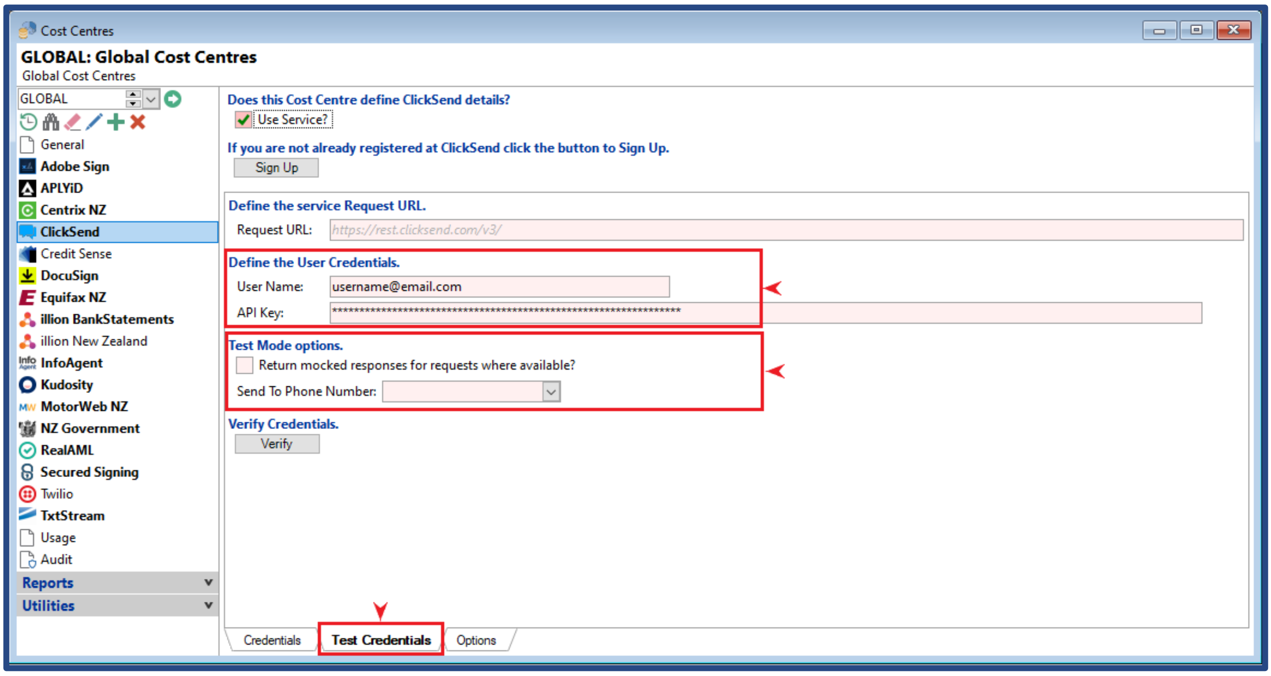


3. Click on the **Credentials** tab and fill in the following fields:
   - **Define the service Request URL** – leave blank; **only** enter a URL **if** specifically requested to.
   - **Define the User Credentials**
     - Messaging - enter the **User Name** and the encrypted **API Key** as supplied by your Dealer or ISS.
     - Advanced Messaging – enter the **User Name** and the **API Key** from your account on the ClickSend website.
4. Click the **Save** icon; once out of edit Mode, the **Verify** button will be available.
   Click the **Verify** button to make sure the information entered is correct.

Test Credentials Tab

Test Credentials are **only** required on the Test Credentials page if you are doing UAT/Testing.

The Test Credentials tab offers additional features for testing purposes. For example, you can have all messages sent to one specified number.



As per the Production Credentials page, enter details as required.

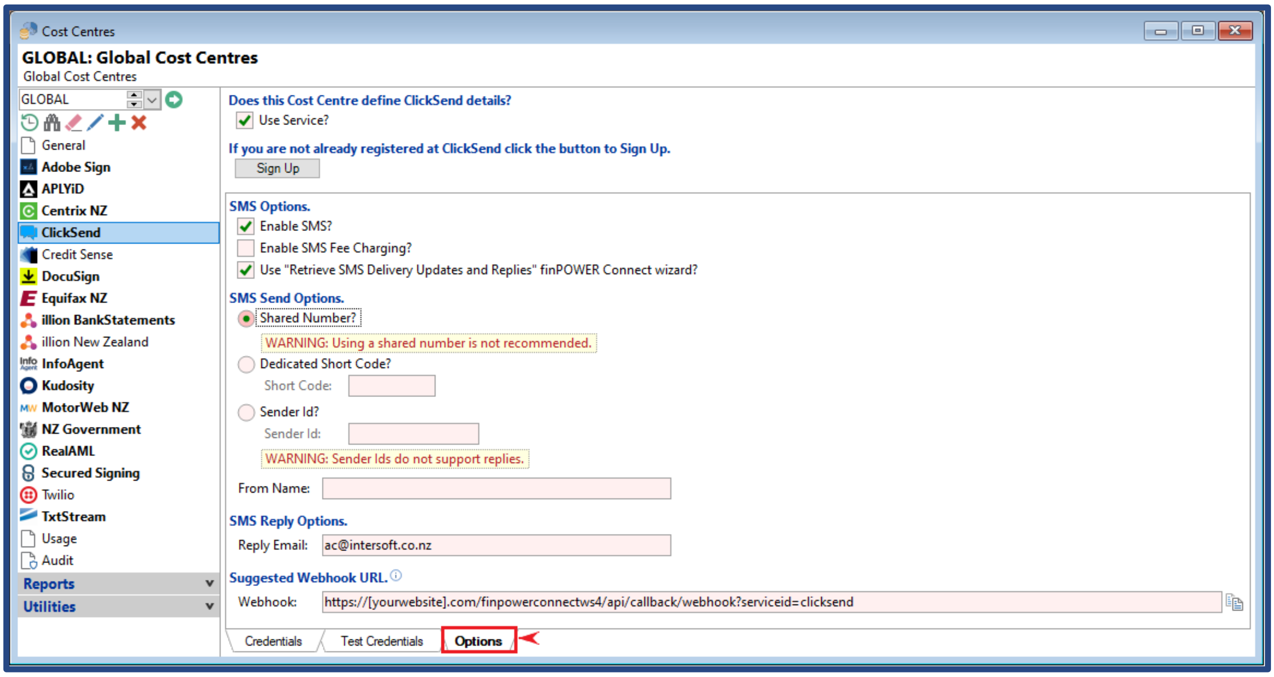
The Test Credentials tab offers additional features under **Test Mode options**:

- **Return mocked responses for requests where available**. Returns are hard coded responses that are built into the system.
- **Send to Phone number**. This allows you to set a phone number that all the test messages are sent to, irrespective of what is specified in the message. What this means is the message will display the number that would normally be used for the message i.e., 'Send SMS' from Client etc., and will show that number in the log. However, it will have used the number set on this page.

These options allow you to perform testing of SMS Messages without sending a message, or you can send them to your own Mobile number.

Options Tab

The Options tab is where you 'Enable SMS' sending – this checkbox must be ticked before the service will be available to use.



Click on the Options tab and fill in the following fields:

1. **SMS Options** - select by ticking the checkbox:
   - **Enable SMS** – this checkbox must be ticked for you to use SMS Messaging from this Cost Centre.
   - **Enable SMS Fee Charging** – enables a fee to be charged based upon the Account Type setup, (please see section 'SMS Fee Setup' section).
   - **Use 'Retrieve SMS Delivery Updates and Replies' finPOWER Connect wizard** - Tick this option to enable the wizard which is found under the menu option **Process**. If using webhooks this option is not required and should not be ticked.
2. **SMS Send options** – add in either of the following:
   - **Shared Number** – this option is not recommended, because you may be sharing a number with several other companies.
   - **Dedicated Short Code** - purchased from ClickSend.
   - **Sender Id** – this option does not support replies.
   - **From Name -** this is the name that is prefixed to the message e.g., *Finance Company: message*.
3. **SMS Reply options –** Add in the 'Reply Email' address that replies are sent to.
4. **Suggested Webhook URL –** This option is only available if the 'Advanced Messaging' module is being used.

   The Webhook URL must be set up within the Inbound or Delivery Report rule found when logged into ClickSend's website. More information can be found in the section below.

More information on Cost Centres can be found within the finPOWER Connect Help pages.

Webhooks

Please Note: this option is only available to be used with **Advanced Messaging**.

There is the option to use Webhooks to automatically update the status of replies. These are not mandatory, however they are the preferred way of receiving updates, as they work in real-time and put less strain on both the Client and the Service provider servers.

The Webhook URL will look like the following:

https://[yourwebsite.com]/finpowerconnectws4/api/callback/webhook?serviceid=clicksend
Substitute **[yourwebsite.com]** to your web server base URL.

As already mentioned, the webhook is added to the ClickSend dashboard, in the 'Inbound Rules' and 'Delivery Report Rules'.

If not used, the ClickSend API needs to be polled to check the status of a Transaction. This is done via the 'Pending Service Request' wizard or individually for each transaction.

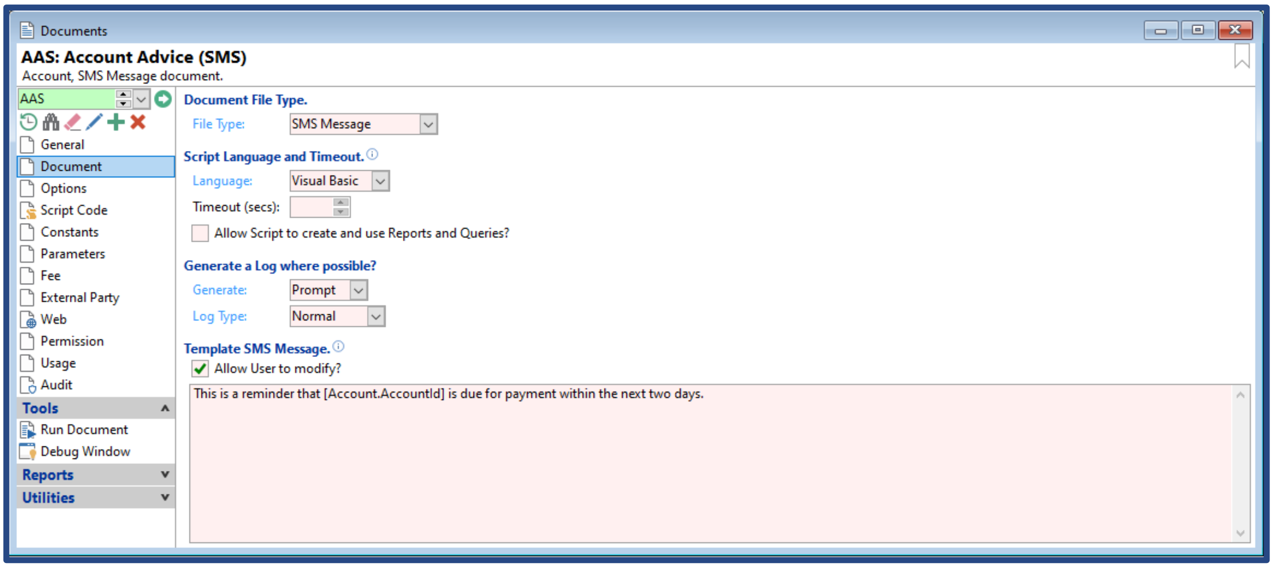
Creating an SMS Document

Using an SMS 'Document' allows you to send SMS Messages in bulk to clients and send SMS Messages as part of a Workflow. Additionally, these SMS Documents can be added to the Report Explorer to run via the Documents section.

Documents are found under the menu option Admin, Documents.

The simplest way of creating a new document is to duplicate one that already exists e.g., the Account Advice (SMS) document (which comes with finPOWER Connect as standard) and rename it to the Description required.

Once saved, go to the Document page, and enter the required message.



There are Smart tags that can be utilised for the message; Smart tags insert information automatically e.g., [Account.AccountId] will resolve to the clients Account ID i.e., L10000.

Right mouse click within the message to view a list of Smart Tags available and click on those that are required.

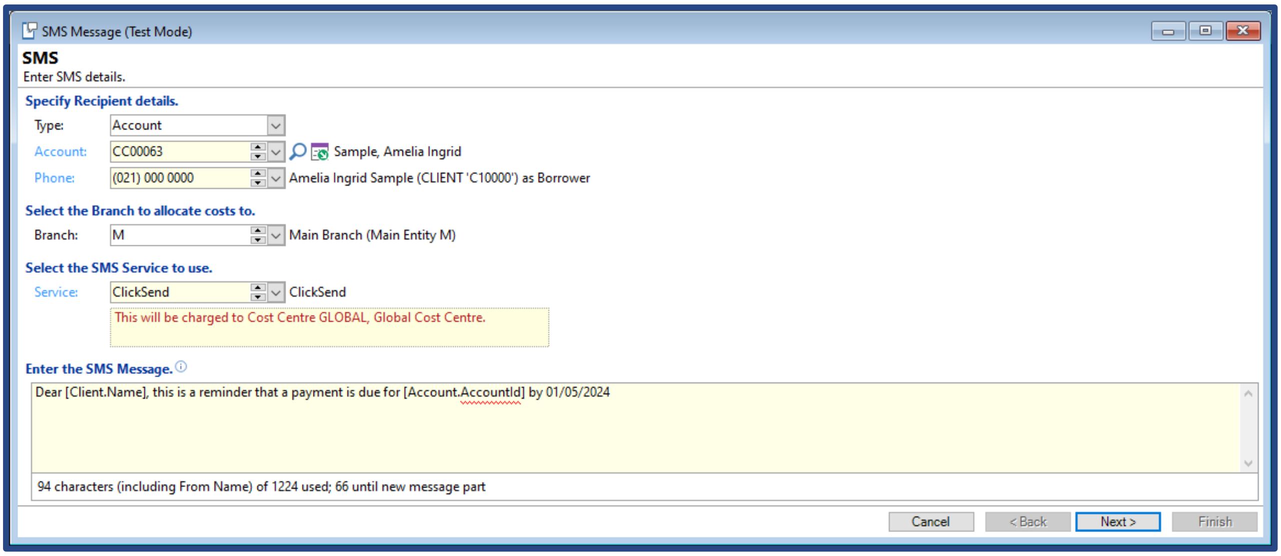
Sending an Individual SMS Document

Individual SMS Document can be sent from Accounts, Account Applications, Clients, Process Menu, and the Task Manager, and runs the same SMS Wizard. When the wizard is run from Accounts, Account Applications or Clients, many of the fields, i.e., Account Id, will be filled in automatically.

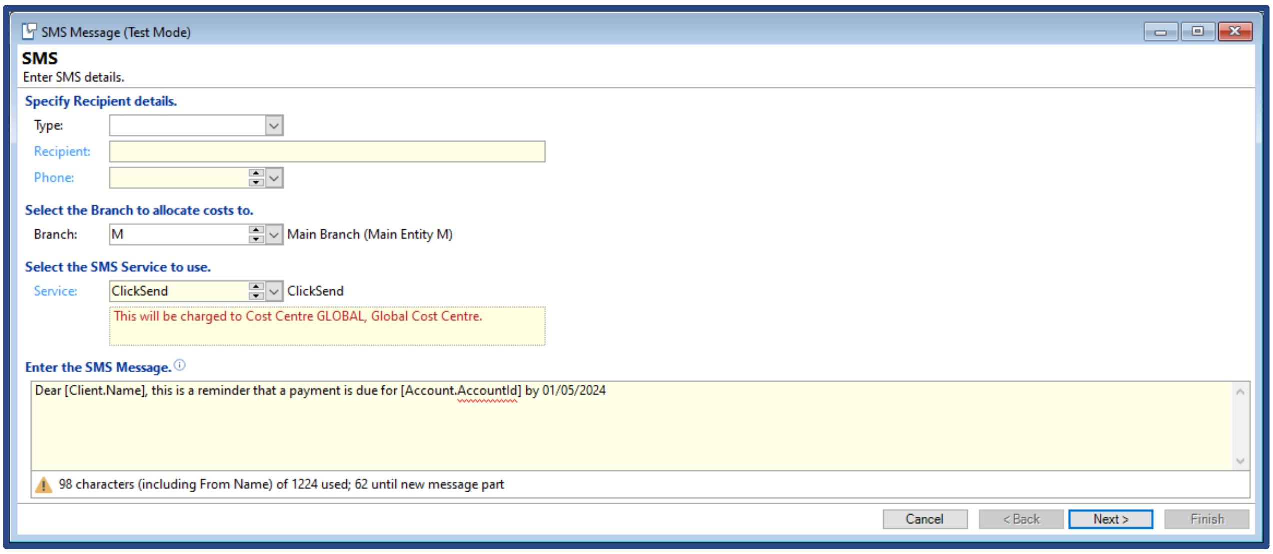
The 'SMS' Icon is found under the 'Communication' section for Accounts, Account Applications and Clients.

The following is based upon sending a message from the Process Menu.

- Go to the menu option, Process, **Send SMS Message**.
- Select the **Type** or leave blank. Selecting a Type e.g., Account, this will allow you to select Accounts only and it will automatically fill in the phone number if it exists on the Account.



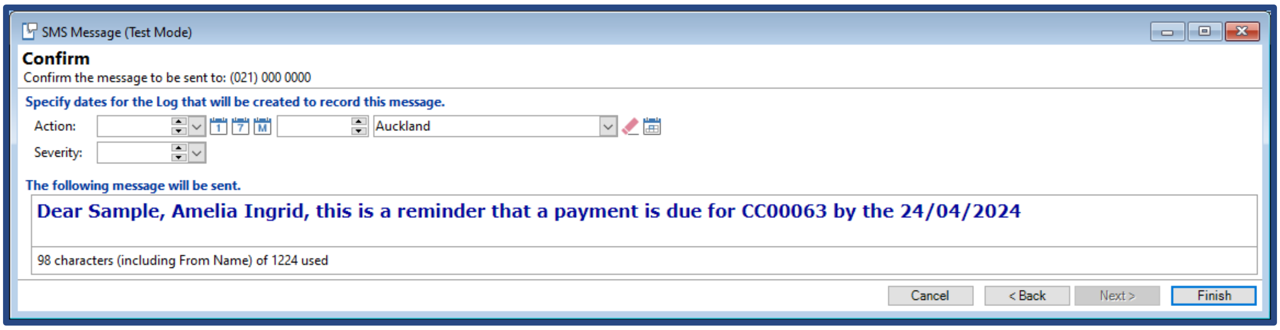
If the **Type** has been left blank, the **Recipient** and the **Phone** need to be manually added.



Select the **Branch,** the **Service** and **Enter the SMS Message** that will be sent, if one has not already been configured in Documents. If a message has been previously configured, this will automatically show here. This includes selecting any Smart Tags that are required - to do this, right mouse click within the message to view the list of tags available and click on those that are required.

Click **Next**.

- The message to be sent will be displayed. If the message needs adjusting, then click the **Back** button to go to the previous screen.



- Click **Finish** and the message will be sent.

Please Note:

- If the message is not linked to a Client or Account then some Smart Tags may not resolve e.g., [Account.AccountId] if you are trying to send from a Client.
- If the message is not linked to a Client or Account, then the resulting Service Log can be found via the ‘Audit Search’. Go to menu option Report, Audit Search, Messaging (SMS) requests, select any other information that is relevant and click Next.

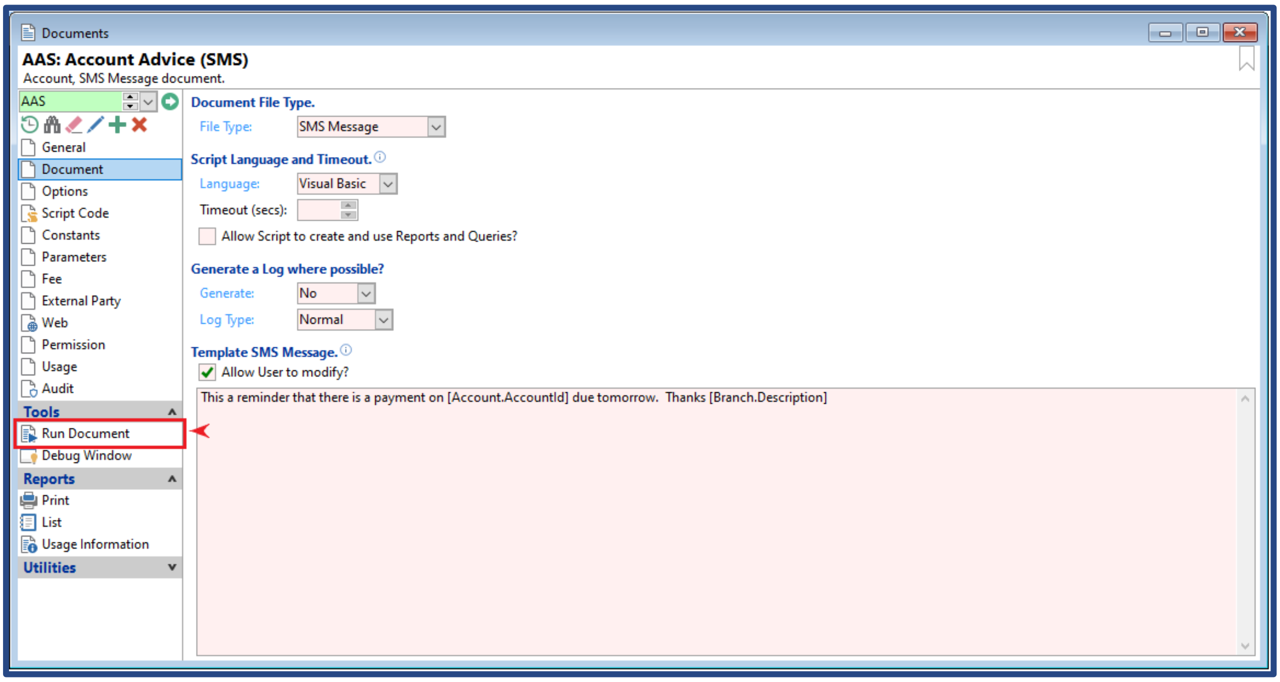
  This will show you all Logs within your search criteria, including any logs not linked to an Account or Client.

Sending a Bulk SMS Message

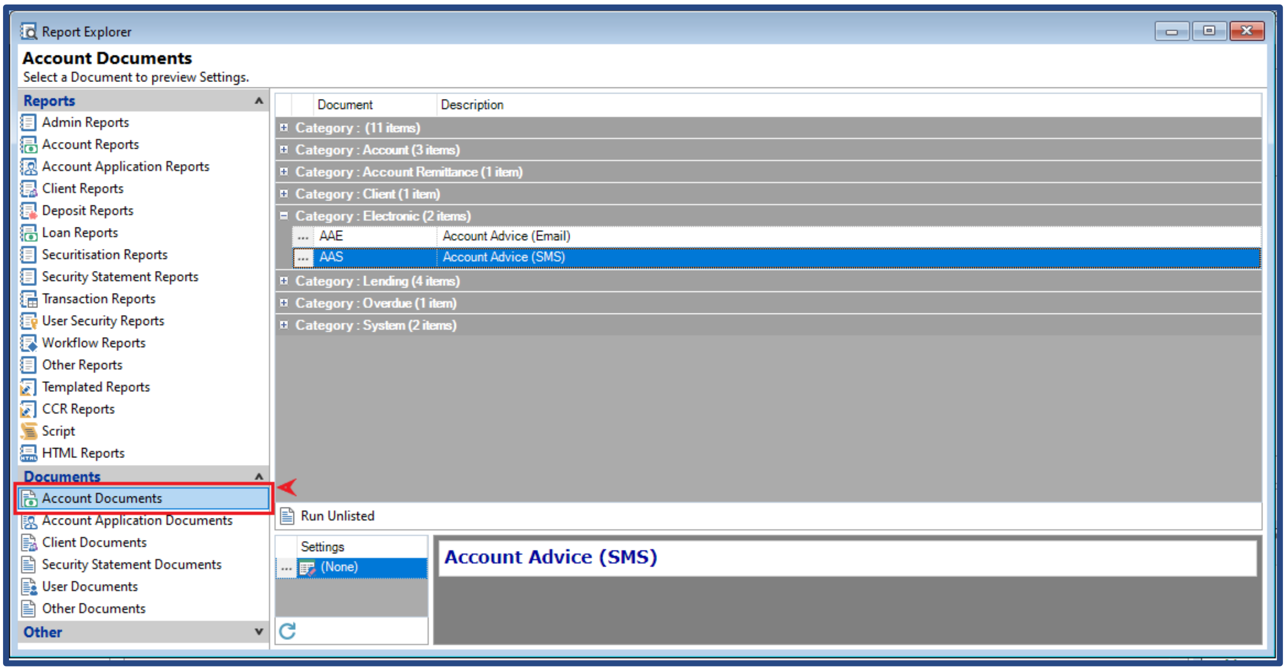
Using an SMS type Document allows you to send SMS Messages in bulk and send SMS Messages as part of a Workflow. Additionally, these SMS Documents can be added to the Report Explorer to run via the Documents section.

The start of the **Bulk Document** wizard can be accessed from the following two Menu options:

- Admin, Documents, select document, **Run Document** option in the Tools section:

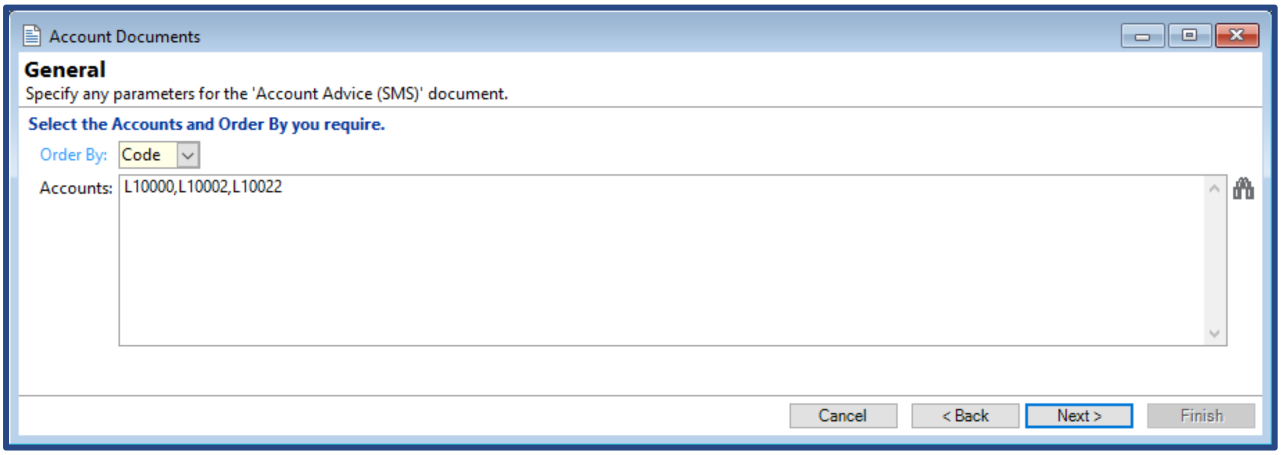


- Or, go to menu option Report, Report Explorer, Documents, Account Documents. Click on the 3 dots next to the relevant document. The Documents that have been made available can be found in this section under the appropriate Category (if this has been set).



Steps to run the Bulk SMS Wizard

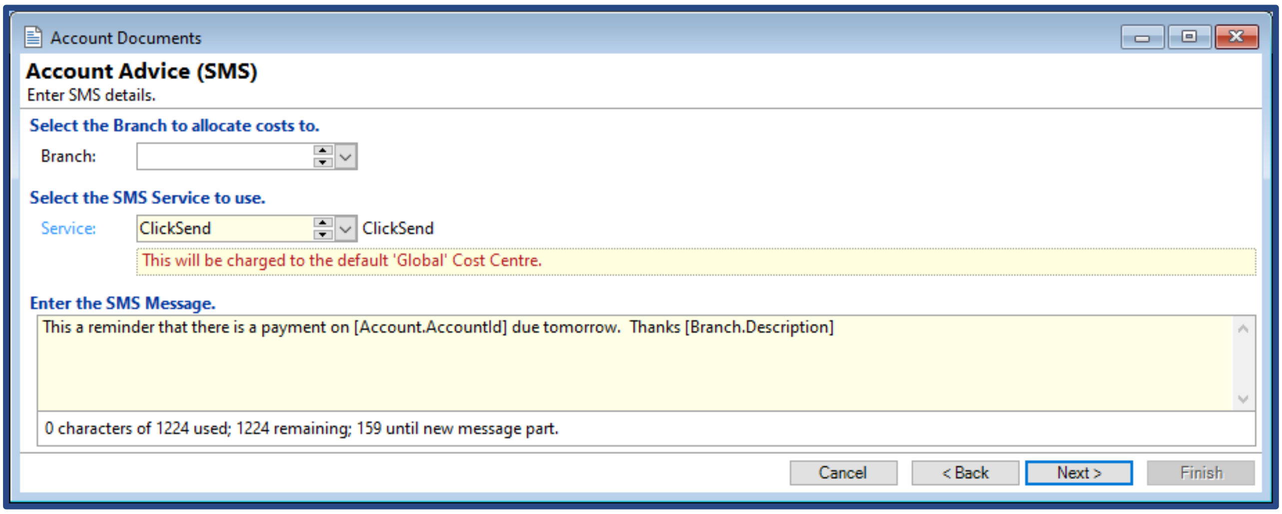
1. After opening the relevant document either through the Documents wizard or the Report Explorer, the first page of the wizard allows you to select all the Accounts or Clients (depending on the settings for the document) that you will be sending this SMS Message to.



2. The following pages may include 'Filters' and 'Ranges' (view more information about these pages within Help, under Report Options, Filter Pages, and Ranges Pages).

   Select all that are appropriate and click the **Next** button.

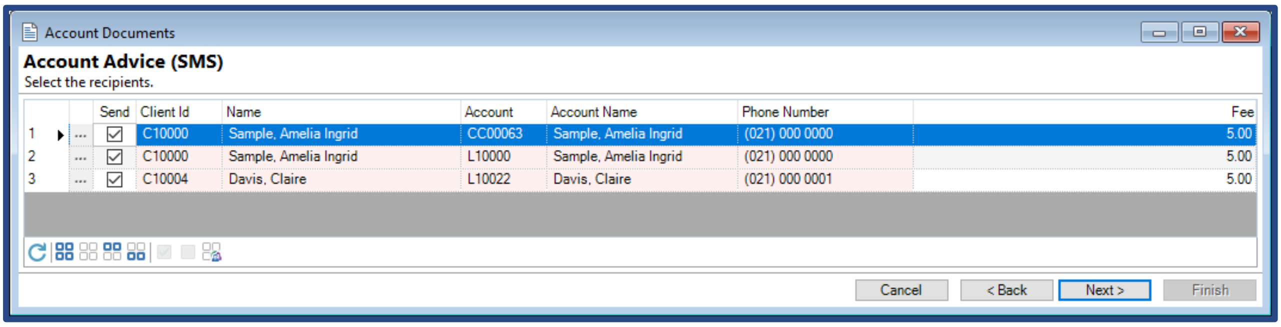
3. The **Enter SMS details** page allows you to do the following where needed:



- Select the **Branch**
- Select the **Service** if it is not already being defaulted to.
- Update the **SMS Message**.

Update all that are required and click the **Next** button.

4. The **Select the recipients** page allows you to check and select recipients as required by ticking the checkboxes.



Update all that are required and click the **Next** button.

5. The Log page will show, so that you can update the Log Date and action date. Click **Next** to move to the next page or **Finish** to send the document. **Please note**: the 'Create Log' tick box is set to true and disabled by default.

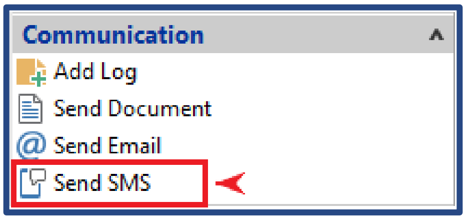
6. The final page allows you to Save the settings that have been selected or Add to a Queue. If neither is required, then click the **Finish** button to send the document.

   More information about adding to queue can be found in the following Help pages:

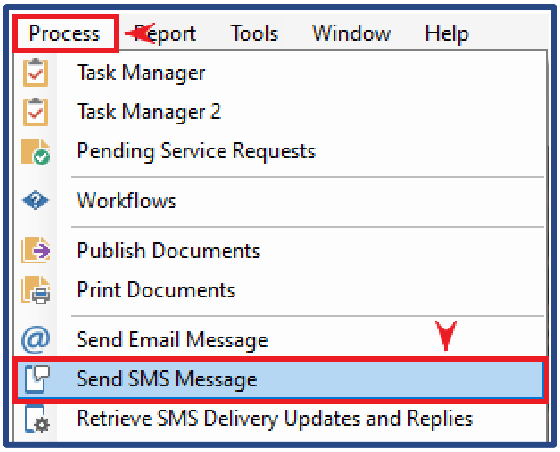
   - https://help.intersoft.co.nz/fin6.0.4/index.htm#XReport.Settings.Overview
   - https://help.intersoft.co.nz/fin6.0.4/index.htm#XReport.Queues.Overview

Sending an Ad-Hoc SMS

SMS Messages can be sent on an AdHoc basis to an Account, Account Application, Client, External Party or User. These are sent from the Communication section of an Account, Account Application or Client:



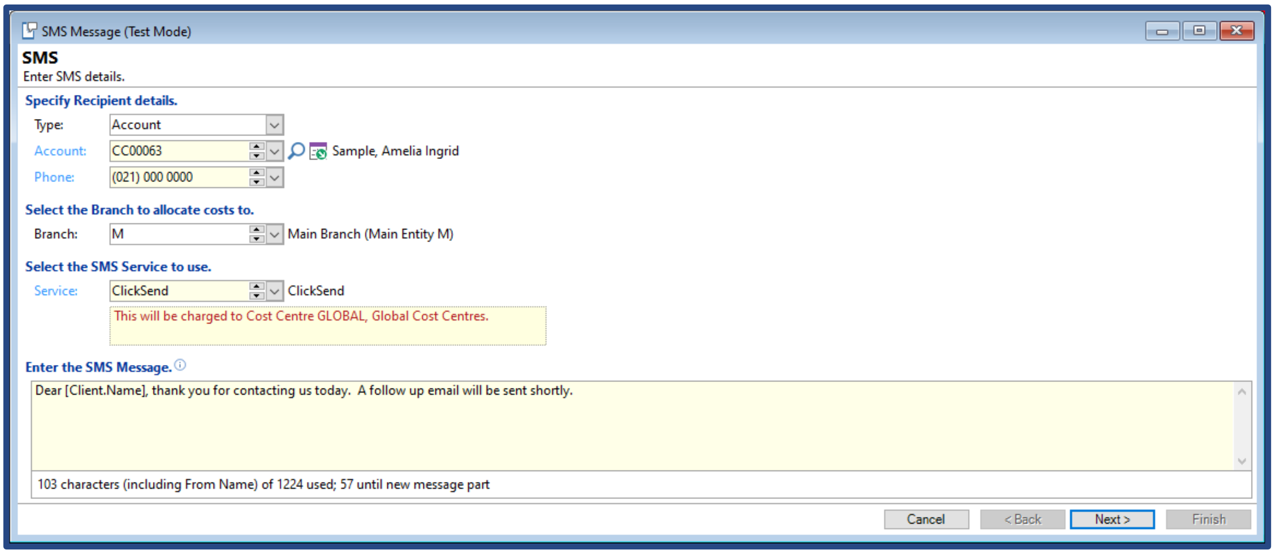
Or from the Menu option Process, Send SMS Message:



Steps to sending an Ad hoc SMS Message

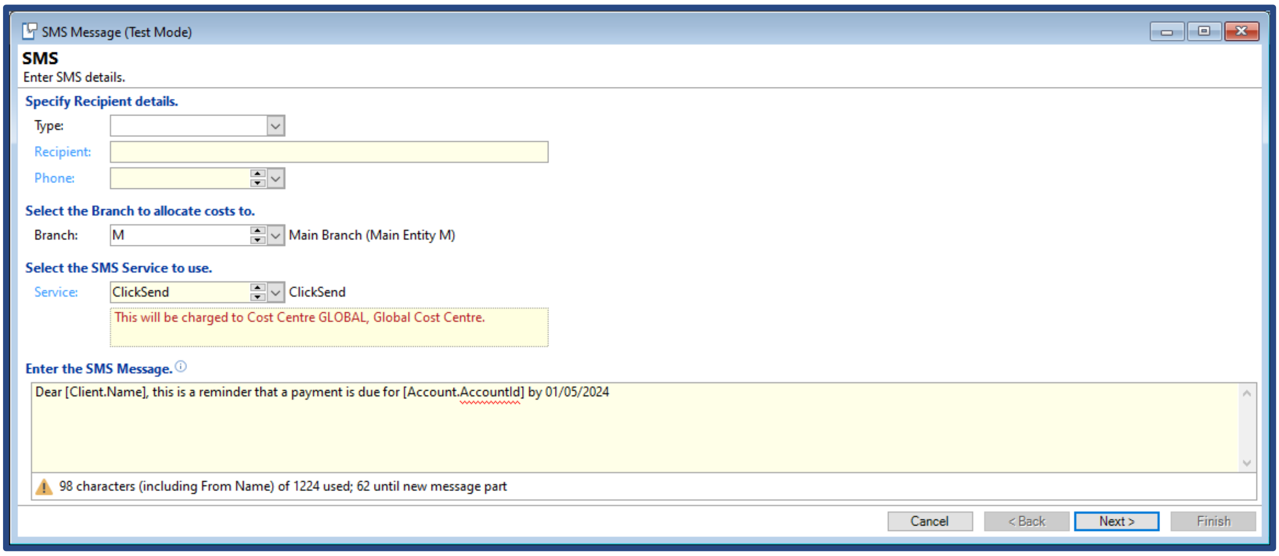
The following is based upon sending a message from the Process menu:

1. Go to menu option, Process, **Send SMS Message**.
2. Select the **Type** or leave blank.



Selecting a type e.g., Account will allow you to select Accounts only and will fill in the phone number if it exists against on the Account.

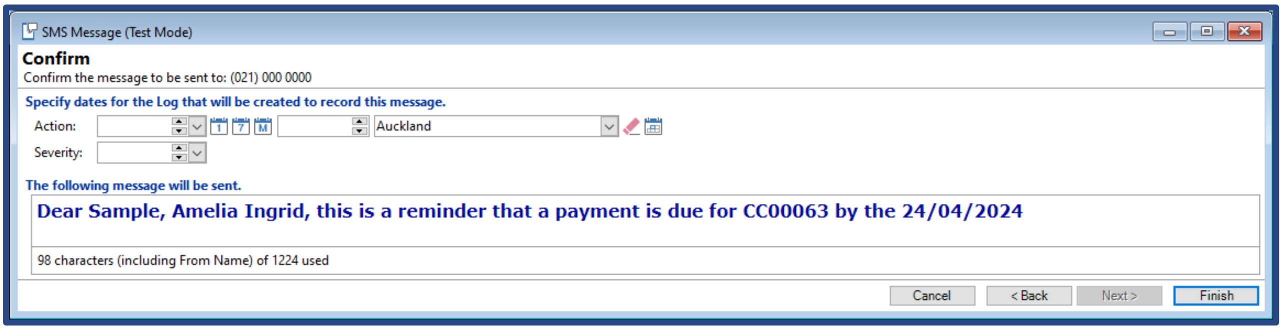
If the **Type** has been left blank, the **Recipient** and the **Phone** need to be manually added.



Select the **Branch,** the **Service** and **Enter the SMS Message** to be sent, including selecting any Smart Tags that are required - to do this, right mouse click within the message to view the list of tags available and click on those that are required.

Click **Next**.

3. The message to be sent will be displayed.



If the message needs adjusting, then click the **Back** button to go to the previous screen.

Click **Finish** and the message will be sent.

Please Note:

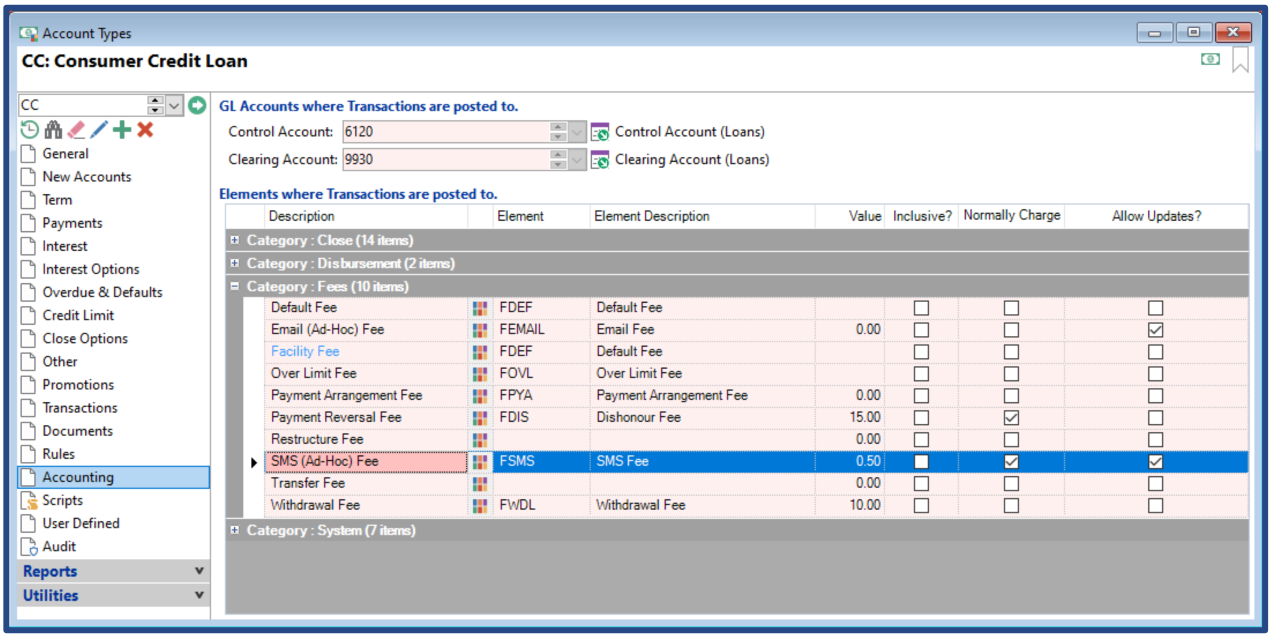
- If the message is not linked to a Client or Account then some Smart Tags may not resolve e.g., using [Account.AccountId] on a Client will not resolve.
- If the message is not linked to a Client or Account, then the resulting Service Log can be found via the 'Audit Search'. Go to menu option Report, Audit Search, Messaging (SMS) requests, select any other information that is relevant and click Next.

  This will show you all Logs within your search criteria, including any logs not linked to an Account or Client.

SMS Fee Setup

Ad-Hoc SMS Fee

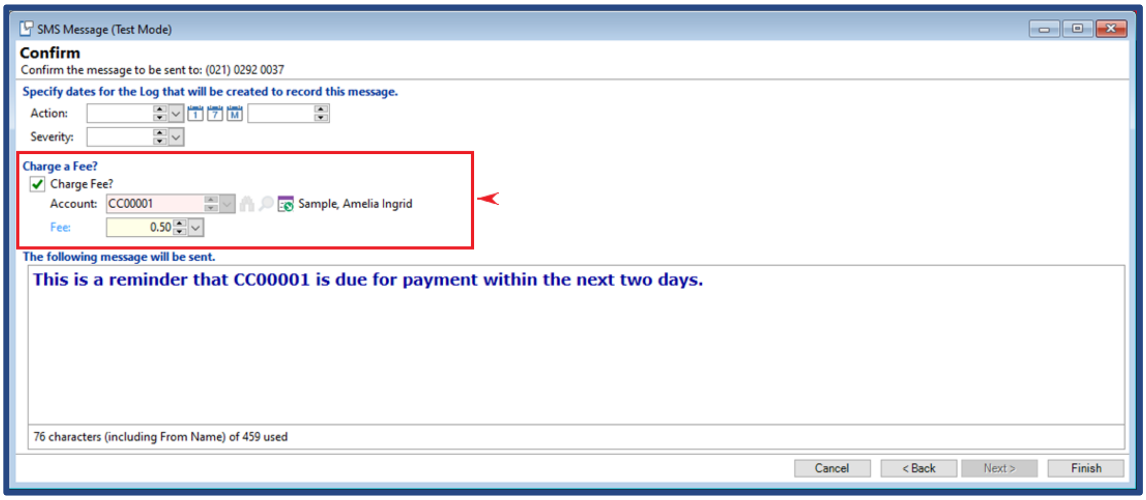
To charge a fee to an Account when an 'Ad-Hoc' SMS is sent to an Account, go to the menu option Admin, Account Type, Accounting Page.



Under the **Category: Fees**, you will see **SMS (Ad-Hoc) Fee**, select the appropriate **Element** for the fee, enter the **Value** of the fee and tick the appropriate checkboxes to do the following:

- Inclusive – tick to make the fee part of the transaction.
- Normally Charge – ticking this option means that it will be charged every time.
- Allow Updates – provides the option of being manually updated e.g., whether the fee can be amended and/or not charged.

If the 'SMS (Ad-Hoc) Fee' has been set, then a Log page will appear in the wizard which includes the Fee section which can be updated if allowed.



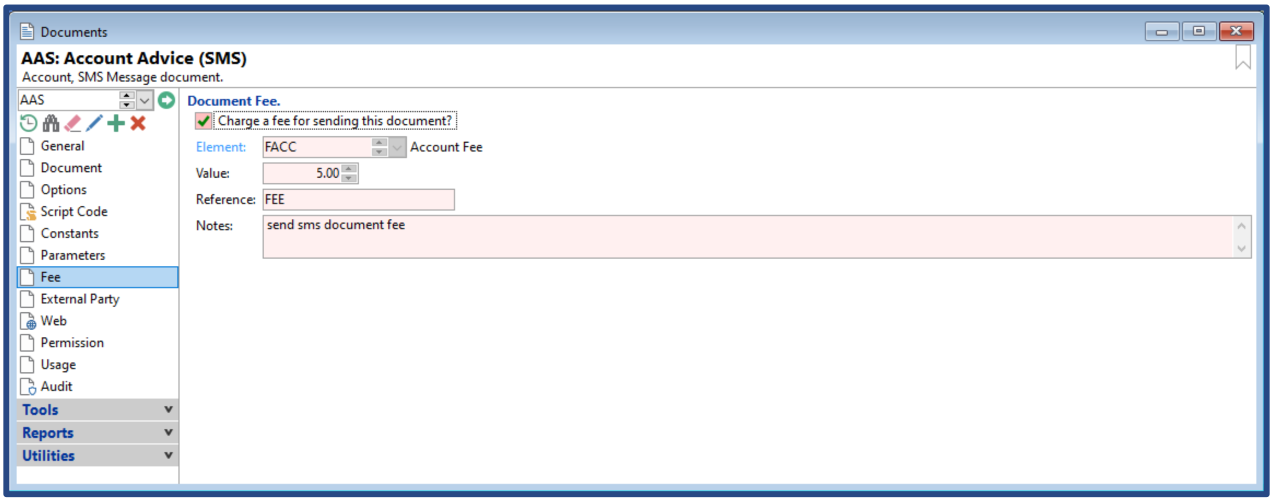
Click **Finish** to complete the wizard and send the SMS Message.

Document SMS Fee

An Account SMS Document can be set up to include fees.

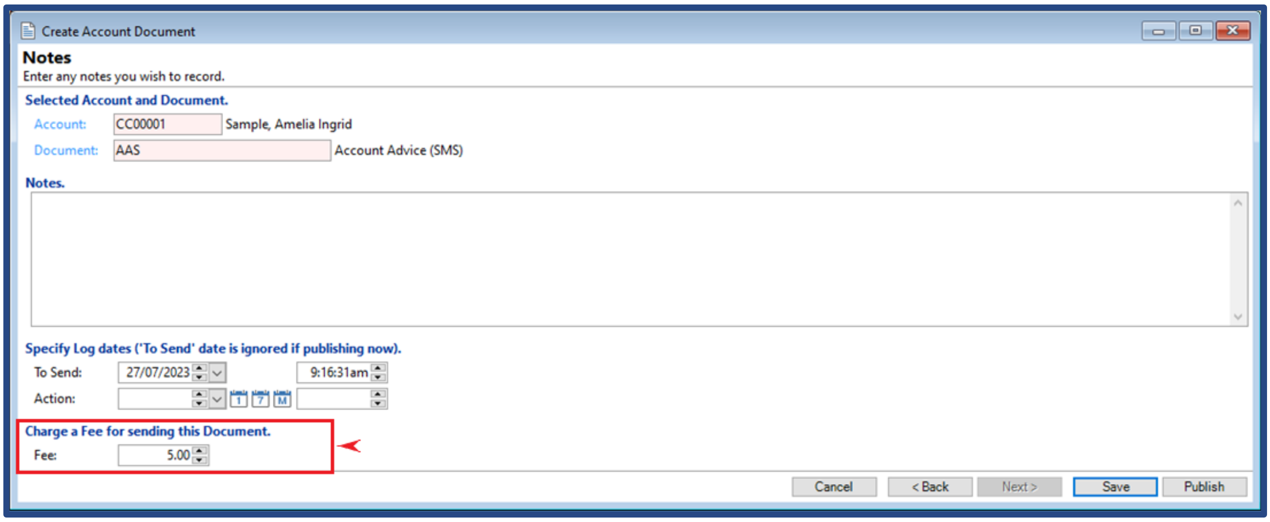
Please note, a fee cannot be charged when sending an SMS directly to a Client and can only be used when sending through an Account to an 'Account contact'. Additionally, if the document type is set to anything but 'Account' the **Fee** page will be greyed out:

To set up, go to menu option Admin, Documents, select the document and go to the **Fee** page.



Go into Edit mode, add in the amount to be charged and fill in any other fields that are appropriate.

If the system has been set to charge a fee, then when sending a message, a Log page will appear in the wizard which includes a Fee section.



Check the fee is correct (update if needed) and click **Publish** to send the SMS Document.

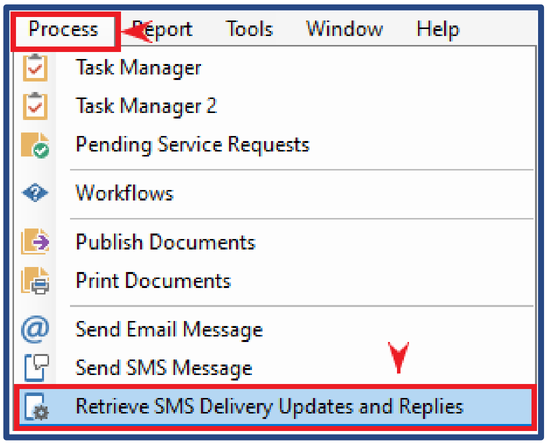
Replies and Delivery Status Updates

Advanced Messaging Add-On

When licenced for Advanced Messaging, Replies and Delivery Status updates can be retrieved via the following options:

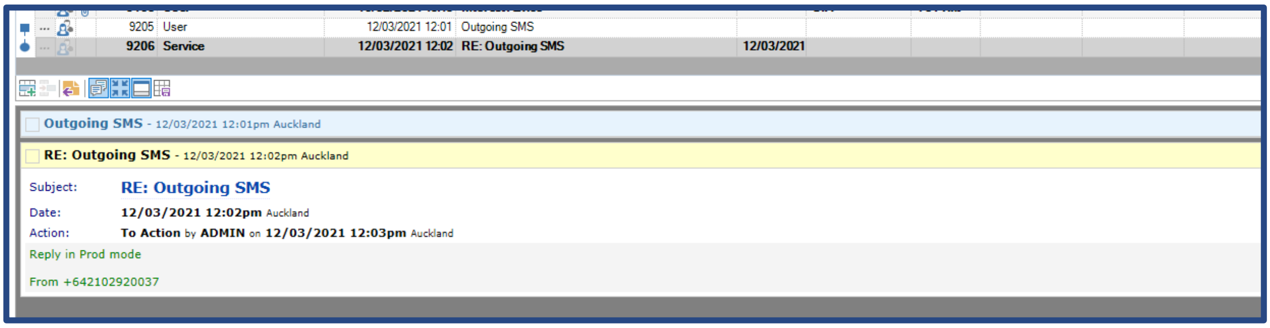
- If **Use 'Retrieve SMS Delivery Updates and Replies' finPOWER Connect wizard** is ticked in the Cost Centre, then clicking Process, 'Retrieve SMS Delivery Updates and Replies' will bring replies into finPOWER Connect.
- If you are using **Webhooks**, then the reply message will be attached to the original message in the Log section of the Account, at the time it comes into the system, without the need to run the 'Retrieve SMS Delivery Statuses and Replies' wizard.

To run the 'Retrieve SMS Delivery Updates and Replies' go to the menu option **Process**.



This should be run regularly and may take a few minutes to process.

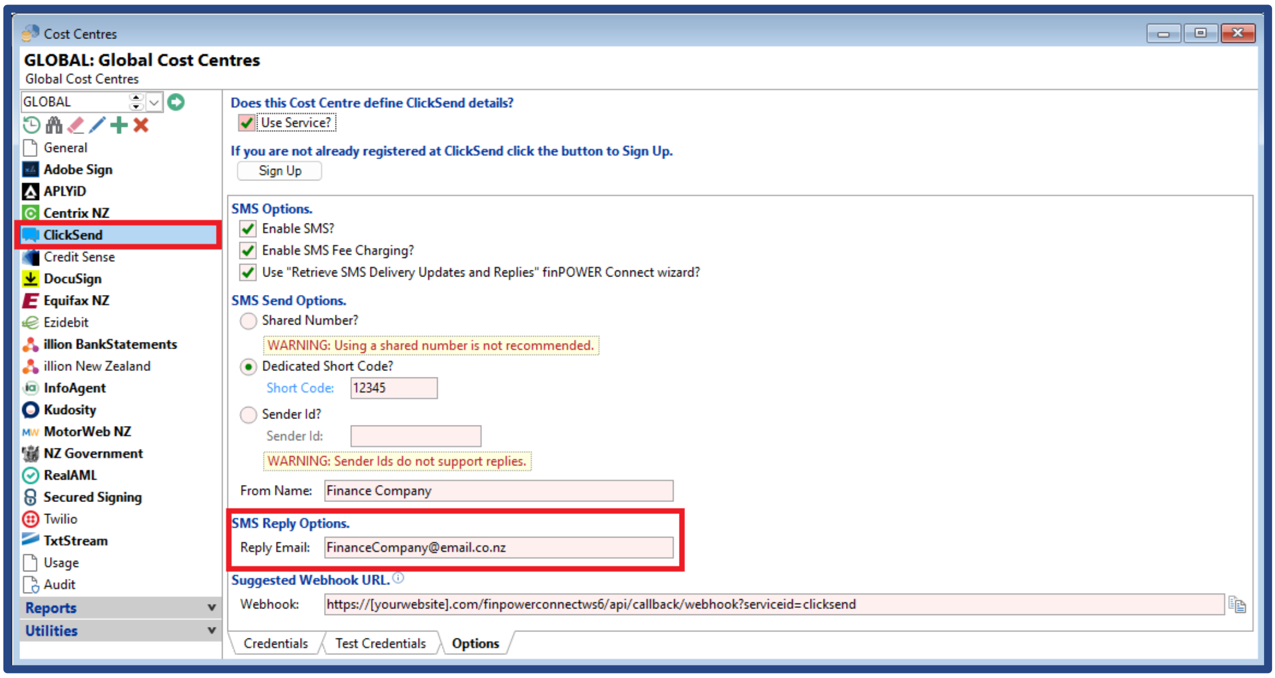
Please Note: Running the wizard too often in quick succession may result in a 401 error. If you receive this error, wait a few minutes, and try again.



Once the above wizard has been run, you will be able to see the linked log within the Account or Client Logs.

Messaging Add-On

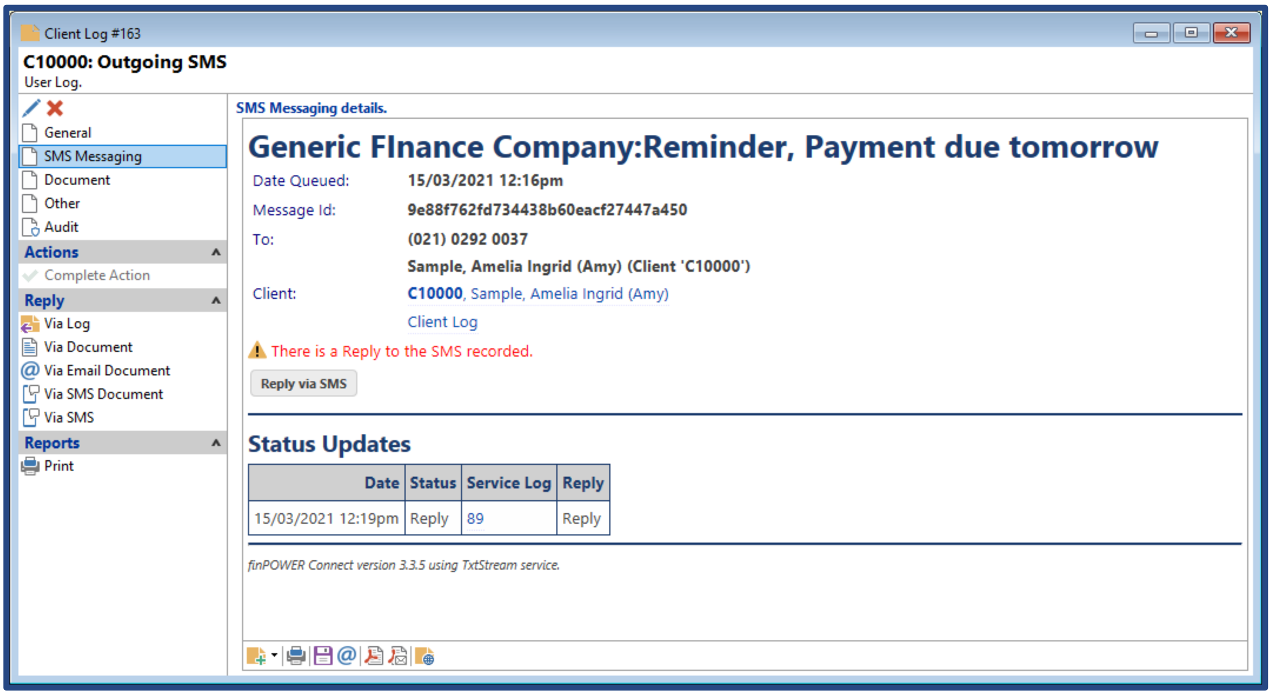
If you are licenced for ‘Messaging’ and not ‘Advanced Messaging’ SMS replies can **only** be received via email.



The reply email address is set up in via Cost Centres, on the Options tab.

Log Forms

Each time an SMS Message is sent, a log is attached to the Client. Replies are also logged and linked to the original log and message.



These can be opened, and you can view the message and date it was sent.
Other options include, being able to reply via a number of different methods, print, and view other logs that may be linked.

Reporting

The following reports are available under **Cost Centres**, and **Report Explorer, Admin Reports**:

- Cost Centre Details
- Cost Centre List
- Cost Centre Analysis

Report, Audit Search – the following options are available to view breakdowns of Messages sent:

- Chargeable Activity e.g., chargeable services,
- Messaging (SMS) requests.