

# Quick Start Guide

Version: 300910

**SMS Made Easy**

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## 1.1 Overview of CreateText Quick Start Guide

CreateText is the easy way to send group texts and receive replies. Use this Quick Start Guide to get up and running quickly on your CreateText account.

Start now and find out **how to**:

- Login to your CreateText account
- Add a single contact
- Add multiple contacts using an Excel sheet
- Create a group
- Assign contacts to groups
- Delete a group
- Send a single 1-way message
- Send a 1-way message to a group
- Send a 2-way message to a group so that you can receive replies
- View replies

We recommend that you follow this guide sequentially according to your needs.

Your CreateText account has lots of additional functionality, all of which is described in the User Manual. This user manual and a full set of frequently asked questions can be found at

## 1.2 Login to your CreateText account

1. Go to [www.createtext.ie](http://www.createtext.ie).

Enter your email address and the password supplied to you.

A login form with two input fields labeled 'Email' and 'Password'. A red oval highlights both fields. Below the fields is a green 'SIGN IN' button.

2. Click the **SIGN IN** button.

A login form with two input fields labeled 'Email' and 'Password'. Below the fields is a green 'SIGN IN' button, which is highlighted with a red oval.

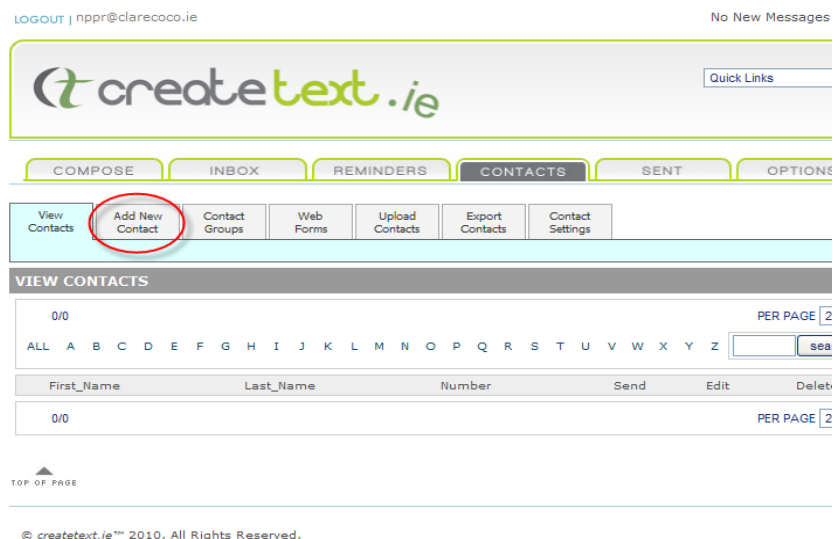
### 1.3 Add a single contact

#### How do I add a contact to my CreateText account?

1. Click the **CONTACTS** tab.



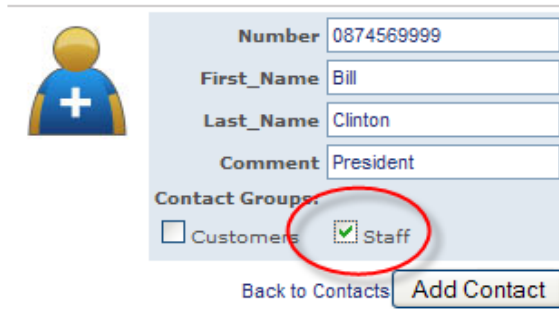
2. Click **Add New Contact**.



3. Enter the contact's details.

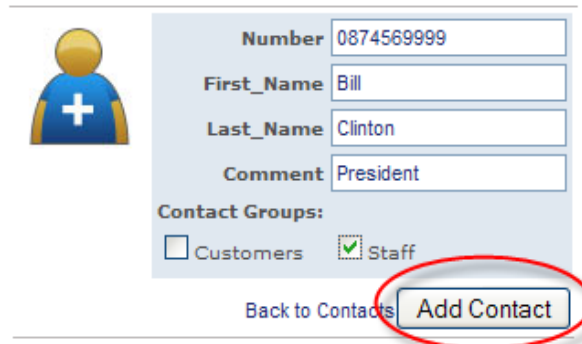
<b>Number</b>	<i>No spaces, with or without international code</i>
<b>First_Name</b>	<i>Add contact's first name</i>
<b>Last_Name</b>	<i>Add contact's last name</i>
<b>Comment</b>	<i>Can be left blank or used for annotation</i>

4. If you want your contact to be a member of a group, select the checkbox beside the desired group. Here, we have assigned our contact to the **Staff** group. To create your own group/s, see **Create a Group** instructions on page 9.



A screenshot of a web form for adding a contact. On the left is a blue person icon with a white plus sign. The form fields are: Number (0874569999), First\_Name (Bill), Last\_Name (Clinton), and Comment (President). Under 'Contact Groups:', there are two checkboxes: 'Customers' (unchecked) and 'Staff' (checked). A red circle highlights the 'Staff' checkbox. At the bottom are 'Back to Contacts' and 'Add Contact' buttons.

5. Click the **Add Contact** button.



A screenshot of the same contact form as above. The 'Staff' checkbox is still checked. A red circle highlights the 'Add Contact' button at the bottom right of the form.

The contact has now been added to your CreateText account.

## 1.4 Add multiple contacts using an Excel sheet

### How do I add multiple contacts to my CreateText account?

1. Prepare an Excel sheet with your list of contacts.

Prepare your list of contacts in an Excel sheet.

You can use the blank template available at [www.createtext.ie/support](http://www.createtext.ie/support) or an Excel 97-2003 worksheet you may have created already. Use at least three columns:

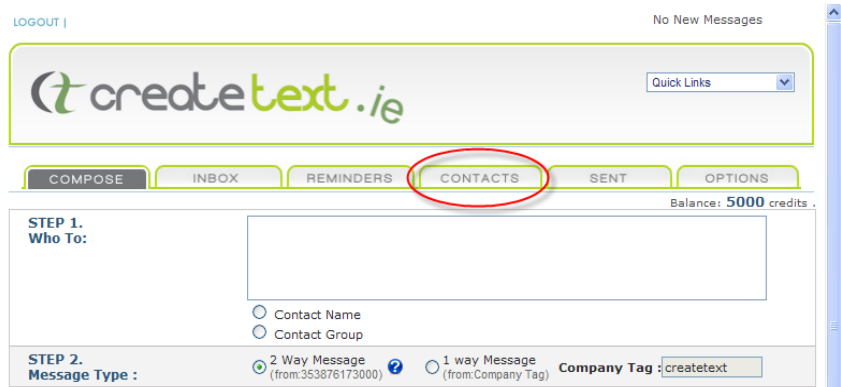
**First Name:** *First name of person to be added to the account*

**Last Name:** *Last name of the person to be added to the account*

**Number:** *With or without the international dialling code*

When your Excel worksheet is complete, save it in a location that you can identify easily on your computer.

2. Click the **CONTACTS** tab



3. Click **Upload Contacts**



- Click the **Browse** button to locate file.

View Contacts | Add New Contact | Contact Groups | Web Forms | **Upload Contacts** | Export Contacts | Contact Settings

### UPLOAD CONTACTS FROM A FILE

Step 1 - Choose your file.

You can upload new contacts to your account by clicking Browse in the form below, then selecting the file from your computer.

**File Format**  
The file should be an Excel file, or a text file in CSV (Comma Separated Values) format.

Once you have uploaded the file to our server, we will take you to the next step in the process, which allows you to map the columns in your file to the relevant contact fields in your address book. So you get to tell us which column contains the phone number, which contains the person's name etc.

Contacts file:  **Browse...**

**Uploading your file. More Information.**  
The file you are uploading should contain one row for each person, and can contain up to 20 items of information related to that person. Your contacts can also have up to 20 items stored for them, though the basic setup is to have a name and number for each person. You can, however, **modify** your settings to include information that you would like to use later, maybe in a mail merge or similar application.

\*When uploading an Excel document, your contacts must be located in the first Sheet within the file.

▲  
TOP OF PAGE

- Click the **Upload File** button.

View Contacts | Add New Contact | Contact Groups | Web Forms | **Upload Contacts** | Export Contacts | Contact Settings

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▲  
TOP OF PAGE



6. Match field names and click the **Continue** button.

**UPLOAD CONTACTS FROM A FILE**

File received ok, checking type.  
looks like an excel file  
5 valid rows uploaded.

Below are some sample rows, taken from your uploaded file at random. You now need to specify which column in the uploaded corresponds to which of your contact fields. On the right hand side are drop-down boxes which list each of y labels. You use the drop-down box to tell us which field is the person's name, which is their phone number etc.

Some of the fields in your file may be irrelevant, so select 'ignore' in the drop-down box, and that information will not us.

If you haven't already done so, you can add custom fields to your contacts information. You may, for example, want separate fields for First Name, Surname, email address etc. You can define new fields by clicking [here](#). You can then c this screen and continue uploading your contacts.

Test 1	Test 2	Test 4	First_Name
Last Name 1	Last Name 2	Last Name 4	Last_Name
+35386222	0866697	872222	Number
			<b>continue &gt;&gt;</b>

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8. Decide if you want to add the new contacts to an existing group and select the appropriate options.

IE INBOX REMINDERS **CONTACTS** SENT

showing the options you selected earlier, together with some sample rows from your upload ng shown is as required. If not, click the 'change' link at the bottom of the table. This will bri where you can make the required changes.

First_Name	Test 2	Test 4	First_Name
Last_Name	Last Name 2	Last Name 4	Last_Name
Number	0866697	872222	Number
			<a href="#">Change...</a>

are uploading can be added to an existing Contact Group, or you can create a new group for them. Please

- Don't add the new contacts to any group
- Add the new contacts to: Choose a Group
- Put them in a NEW group, called:

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9. Click **Upload**.

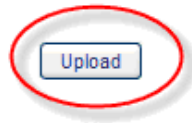


Below is a table, showing the options you selected earlier, together with some that the mapping shown is as required. If not, click the 'change' link at the beginning of the previous stage, where you can make the required changes.

First_Name	Test 2	Test 4
Last_Name	Last Name 2	Last Name
Number	08666979	872222

The contacts you are uploading can be added to an existing Contact Group, or you can choose from the following options:

- Don't add the new contacts to any group
- Add the new contacts to:
- Put them in a NEW group, called:



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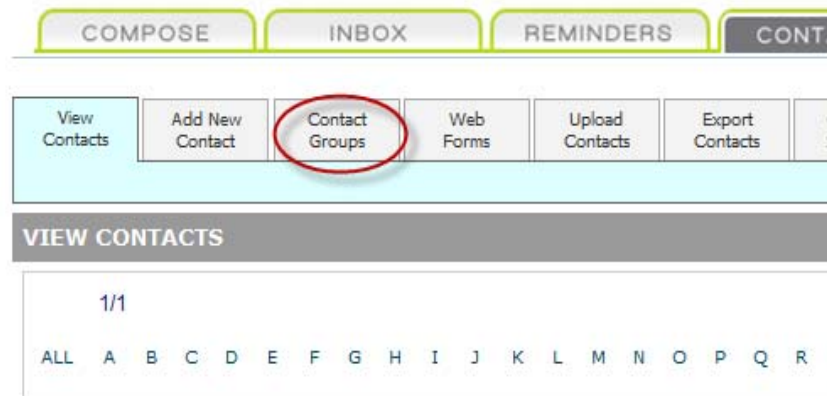
## 1.5 Create a group

### How do I add my own groups to CreateText.ie?

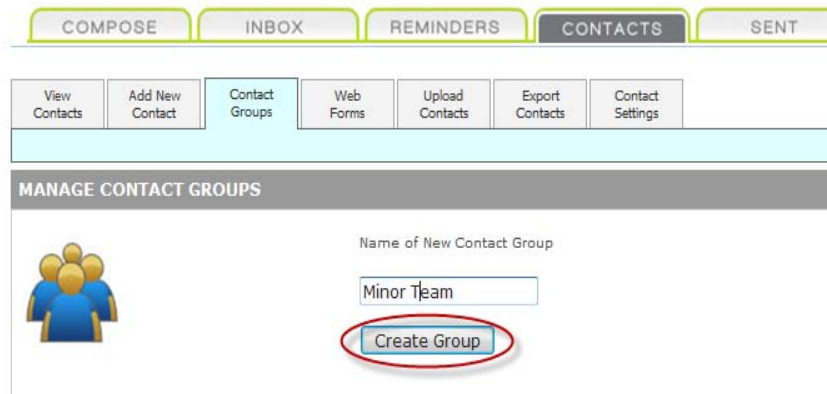
1. Click the **CONTACTS** tab.



2. Click **Contact Groups**.



3. Enter the name of your new group and click the **Create Group** button.




4. The group **Minor Team** is now one of your listed groups.

COMPOSE INBOX REMINDERS CONTACTS SENT OPTIONS

View Contacts Add New Contact Contact Groups Web Forms Upload Contacts Export Contacts Contact Settings

**MANAGE CONTACT GROUPS**

 Name of New Contact Group

[Upload Contacts from a file](#)

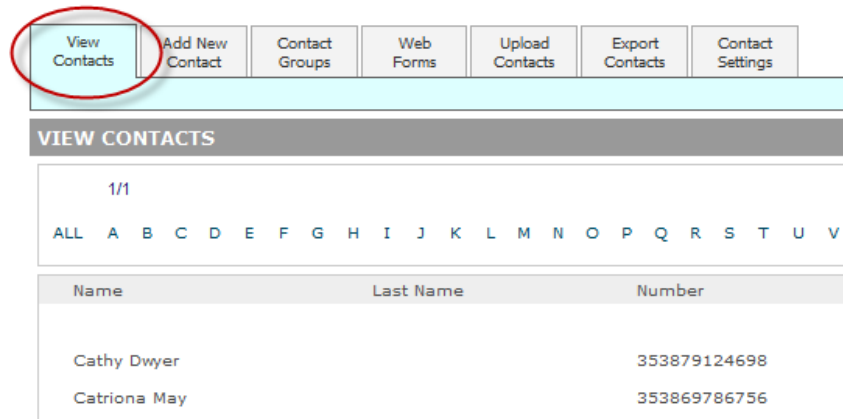
**Your Contact Groups**

Group Name	Mbrs	Alias	Edit	Delete	Group Name	Mbrs	Alias	Edit	Delete
<input type="checkbox"/> Customers	6	888273883			<input type="checkbox"/> First Class	5	888101418		
<input type="checkbox"/> <b>Minor Team</b>	0	888415597			<input type="checkbox"/> Staff	0	888111254		

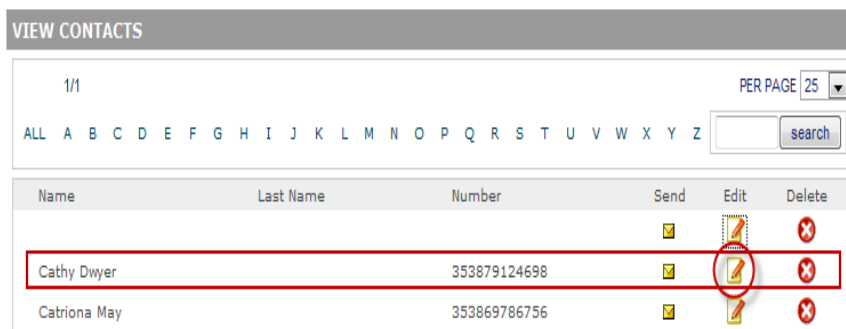
## 1.6 Assign members to a group

Now that I've uploaded some contacts, how do I put them in groups?

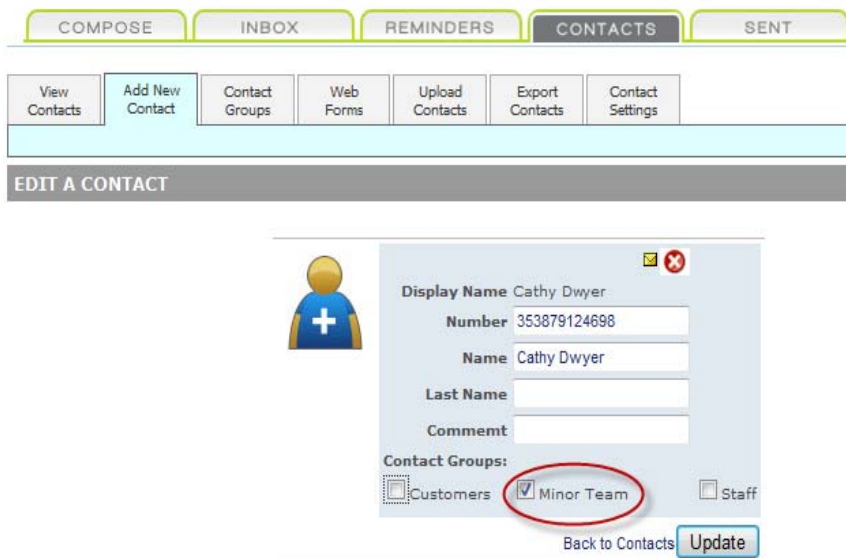
1. On the **CONTACTS** tab, click **View Contacts** to see your list of contacts.



2. Click the **Edit** icon on the same line as the contact in question.



3. In the panel that appears, select the group (or groups) to which you want to assign your contact – in this case, **Minor Team**. You can assign a contact to as many groups as necessary.



4. Click the **Update** button to save your changes.

EDIT A CONTACT

The screenshot shows a user interface for editing a contact. On the left is a placeholder icon for a profile picture. The main form area contains the following fields and options:

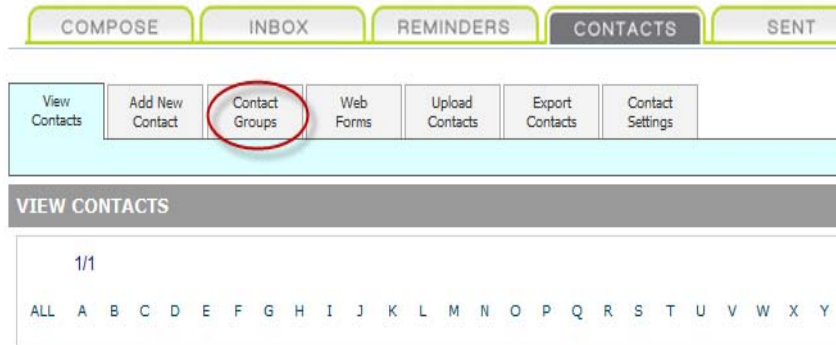
- Display Name:** Cathy Dwyer
- Number:** 353879124698
- Name:** Cathy Dwyer
- Last Name:** (empty field)
- Comment:** (empty text area)
- Contact Groups:**
  - Customers
  - Minor Team
  - Staff

At the bottom right of the form, there is a "Back to Contacts" link and an "Update" button. The "Update" button is highlighted with a red circle.

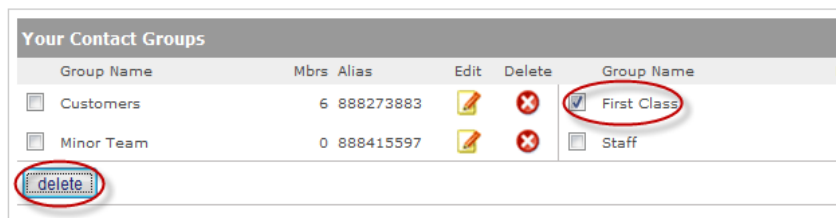
## 1.7 Delete a group

### One of my groups is now obsolete – how do I delete it?

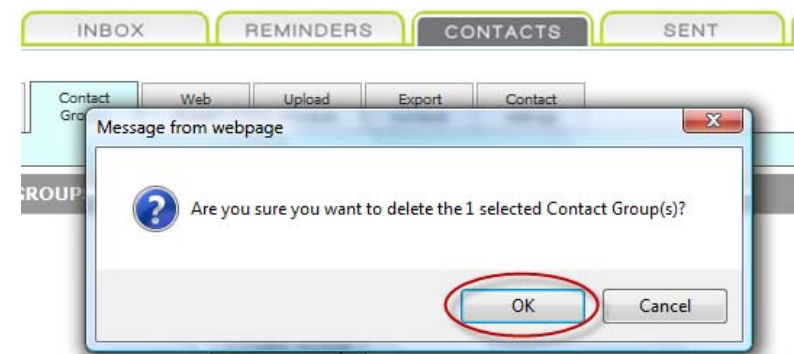
- 1 On the **CONTACTS** tab, click **Contact Groups**.



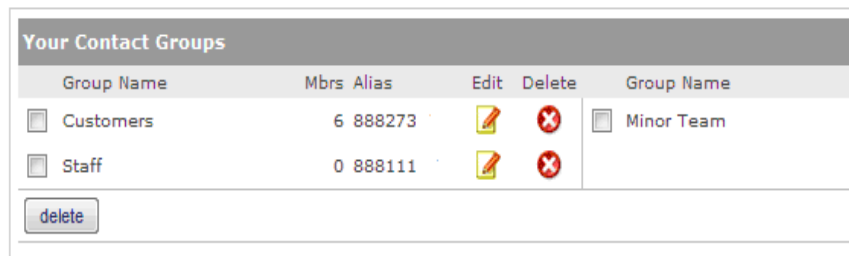
- 2 To delete groups, select the checkbox beside the group/s you want to delete. Here, we've chosen the group **First Class**. Click the **Delete** button.



- 3 In the dialog box that appears, click the **OK** button.



- 4 The group **First Class** is now deleted



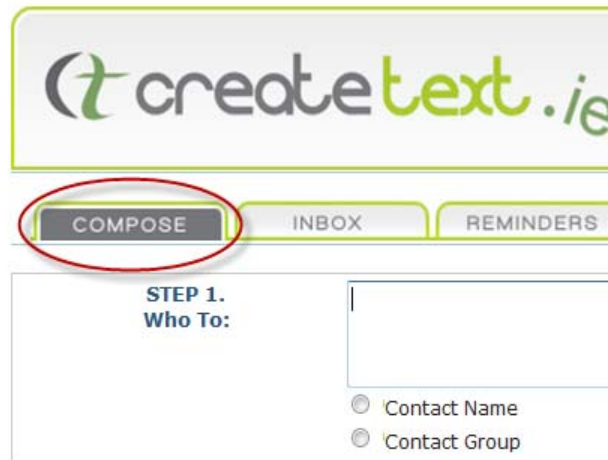
## 1.8 Send a single 1-way message

### How do I send a text message to one person from CreateText.ie?

What's a 1-way message?

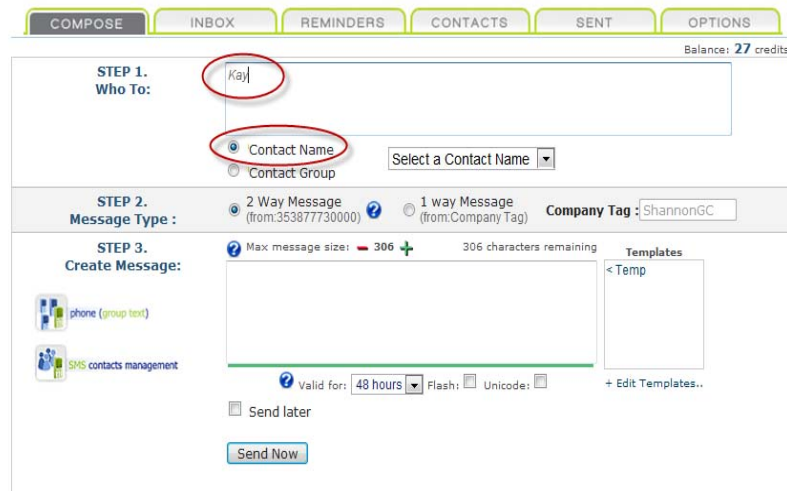
A 1-way message is a message to which contacts *cannot* reply. It bears your group/organisation/company tag or identification.

1. Click the **COMPOSE** tab.

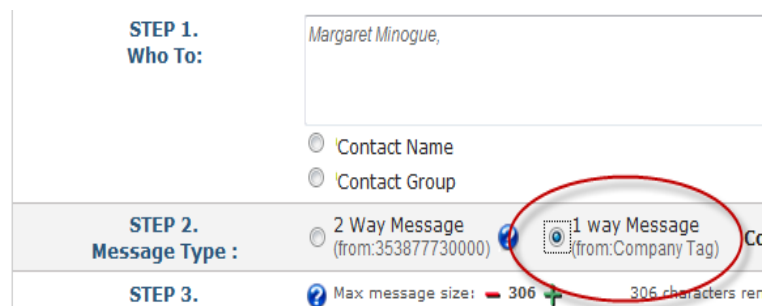


2. In the **STEP 1 Who To:** panel:

- a) Select **Contact Name** and choose from your list of contacts, or
- b) type the contact's name and choose from the predictive list that appears, or
- c) simply enter the contact's number if it's not already in the system.



3. In the **STEP 2 Message Type:** panel, select **1 Way Message**.





4. Enter a company tag – the name of your organisation.

Balance: 27 credits

STEP 1. Who To: Margaret Minogue

Contact Name: Select a Contact Name

Contact Group: [Empty]

STEP 2. Message Type: 2 Way Message (from:353877730000) | 1 way Message (from:Company Tag) | **Company Tag: Acme IT**

5. In the **Step 3 Create Message:** panel, type the message you want to send.

STEP 3. Create Message:

Max message size: 306 + 238 characters remaining

Hi Margaret, are you looking after refreshments for tonight's event?

Valid for: 48 hours | Flash: [ ] | Unicode: [ ]

Send later

**Send Now**

6. To send your message, click the **Send Now** button.

STEP 3. Create Message:

Max message size: 306 + 241 chara

Margaret, are you looking after refreshments for toni

Valid for: 48 hours | Flash: [ ] | Unicod

Send later

**Send Now**

## 1.9 Send a 1-way message to a group

### How do I send a 1-way message to a group on CreateText.ie?

- 1 Select the **COMPOSE** tab.  
In the **STEP 1 Who To:** panel, select the **Contact Group** option

- 2 Select the name of the group from the list.

- 3 In **Step 2: Message Type**, click the 1-Way option.

- 4 Insert a **Company Tag** – the name of your organisation.

- 5 In **Step 3: Create Message**, type the message you want to send.

- 6 To send your message now, click the **Send Now** button.

## 1.10 Send a 2-way message to a group

### How do I send a 2-way message that people can reply to?

What's a 2-way message? A 2-way message is a message to which your contacts can reply. This message will not carry your group or company tag.

1. Click the **COMPOSE** tab. In the **STEP 1 Who To:** panel, select the **Contact Group** option

The screenshot shows the 'COMPOSE' tab selected. Under 'STEP 1. Who To:', there are two radio buttons: 'Contact Name' and 'Contact Group'. The 'Contact Group' option is selected and circled in red. To the right is a dropdown menu labeled 'Select a Contact Group'. Below this, 'STEP 2. Message Type:' shows '2 Way Message (from:353877730000)' selected with a blue question mark icon, and '1 way Message (from:Company Tag)' unselected. 'STEP 3. Create Message:' shows a max message size of 306 characters remaining.

2. Select the name of the group from the list.

This screenshot is similar to the previous one, but the 'Select a Contact Group' dropdown menu is open, showing a list of groups. One group name is selected and circled in red. The 'Contact Group' radio button remains selected.

3. In **Step 2: Message Type**, click the 2-Way option.

The screenshot shows 'STEP 2. Message Type:' where '2 Way Message (from:353877730000)' is selected and circled in red. The 'Who To:' field now contains 'Staff(group)'. The 'Contact Group' radio button is still selected. The '2 Way Message' option is also circled in red.

4. In **Step 3: Create Message**, type the message you want to send, making sure it's clear in the text who the message is from.

COMPOSE INBOX REMINDERS CONTACTS SENT

**STEP 1. Who To:** Staff(group),

Contact Name  Contact Group

**STEP 2. Message Type:**  2 Way Message (from:353877730000)  1 way Message (from:Company Tag) **Company Tag:**

**STEP 3. Create Message:** Max message size: 306 + 192 characters remaining

Company day off next week - would you prefer to take this free day on Monday or Friday? Please vote by text reply.

Valid for: 48 hours Flash:  Unicode:

Send later

5. To send your message now, click the **Send Now** button.

**STEP 3. Create Message:** Max message size: 306 + 192 characters remaining

Company day off next week - would you prefer to take this free day on Monday or Friday? Please vote by text reply.

Valid for: 48 hours Flash:  Unicode:

Send later

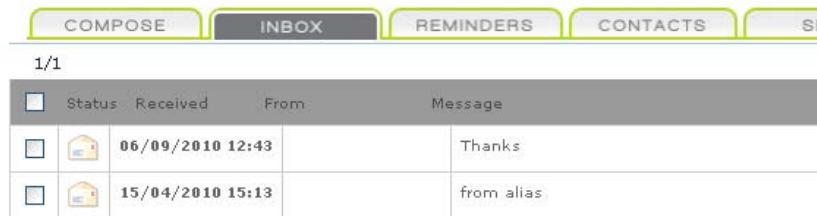
## 1.11 View Replies

### How do I see the replies I receive?

1. Click the **INBOX** tab.



2. All messages you receive are displayed here, most recent first. You can reply to messages, forward and delete them here too.



**Congratulations!** You are now able to send single and group text messages from your Create**Text** account. This document as well as other support material is also available for download from: [www.CreateText.ie/support](http://www.CreateText.ie/support)