createtext.ie

User Manual

Version: 300910

SMS Made Easy

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1 Introduction to Create*Text*.ie

Welcome to Create*Text*.ie, the easy, reliable way to send and receive bulk text messages from both your computer and your mobile phone.

This User Manual will take you through all the functionality available to you with Create*Text*.ie. It will answer any questions you have, and show you how to get the most from Create*Text*.ie. Our videos will also help you in this regard. All Create*Text*.ie support material is available in the Support section of Create*Text*.ie.

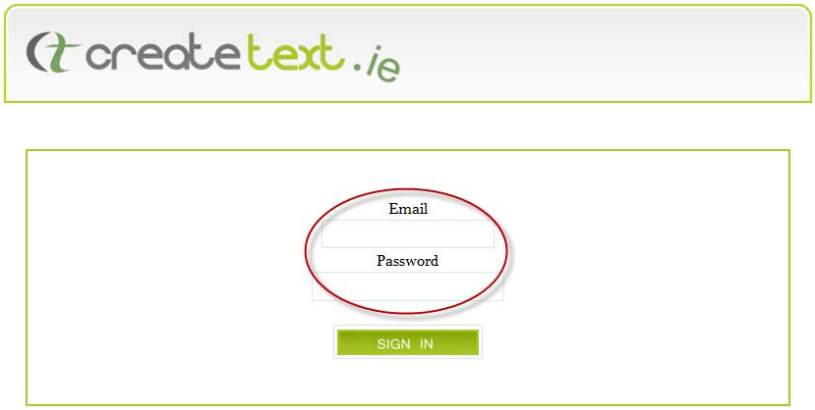
We think you will agree that Create*Text*.ie is very simple and intuitive to use. However, if you require additional email or phone support, one of our team members will be happy to help you. Use the form on the Contact Us page to get in touch with us, or send an email with your query to support@createtext.ie. You can also call us on 01 488 0038

2 Login to your Create*Text* account

How do I log in to CreateText.ie?

1. Go to www.createtext.ie.

   Enter your email address and the password supplied to you.



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

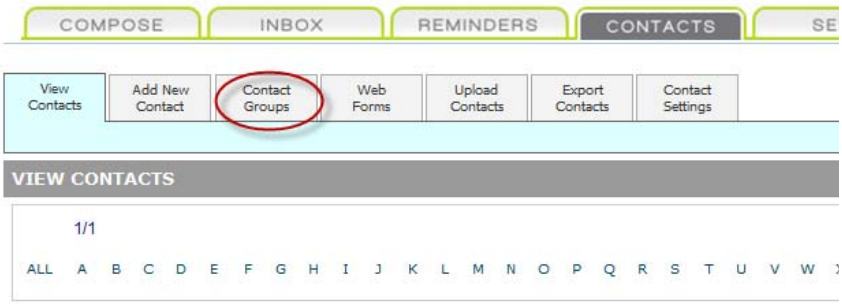
3 Create Groups

How do I create contact groups on CreateText.ie?

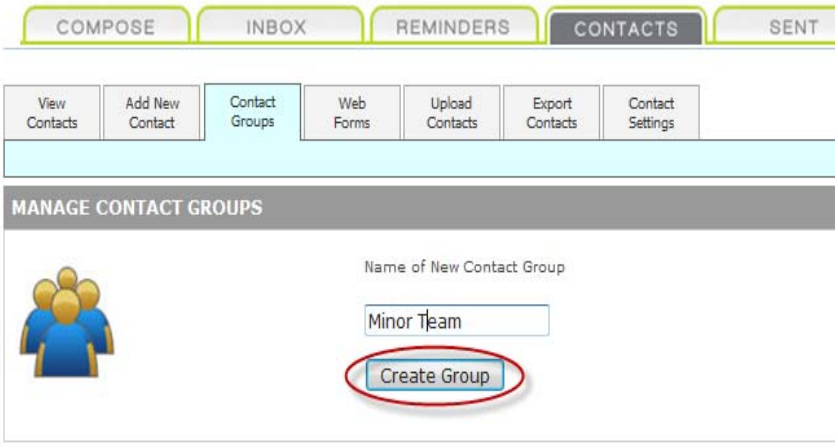
Your contacts probably fall naturally into different groups, departments, classes or teams that you need to stay in touch with. Once you have logged in, you can create those groups according to your needs on **Create*Text*.ie**

1. Click the **CONTACTS** tab.

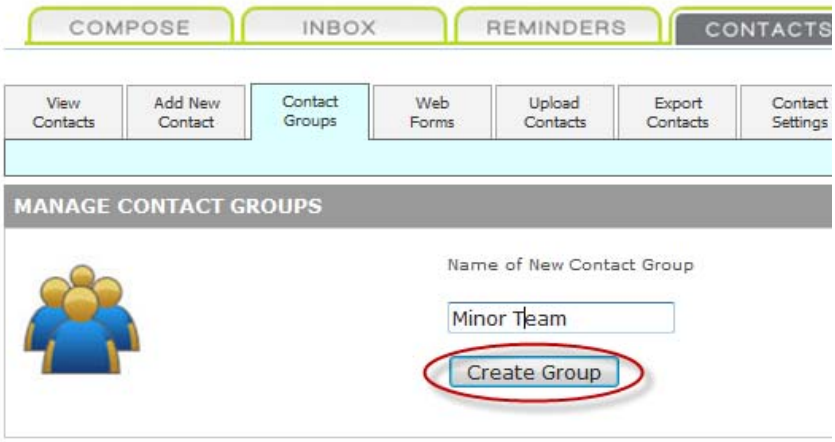
2. Click **Contact Groups**.



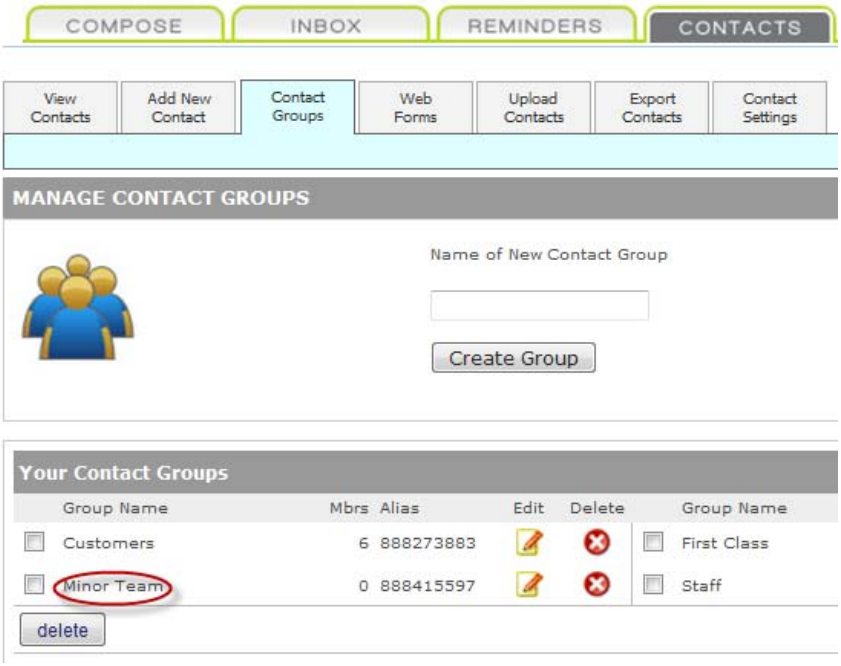
3. Enter the name of your new group.



4. Click the **Create Group** button.



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



Remember, you can create as many groups as you need. Equally, you can delete groups as you require by clicking the Delete button that appears in the column to the right of the group's name.

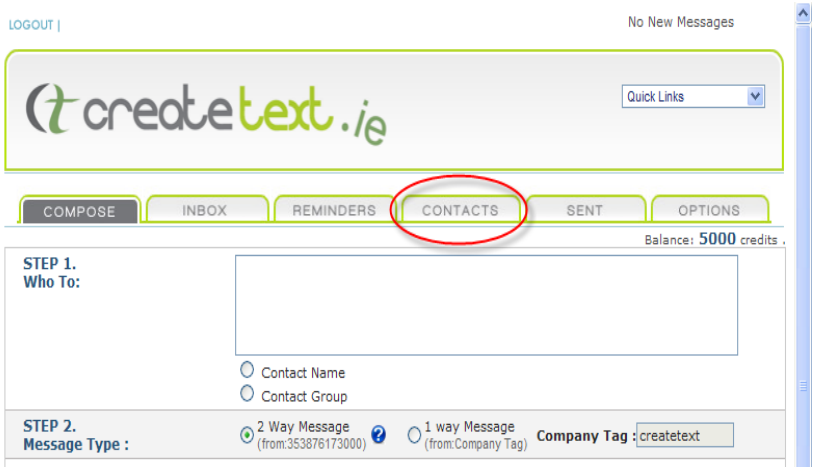
4 UploadContacts

How do I add contacts to my CreateText account?

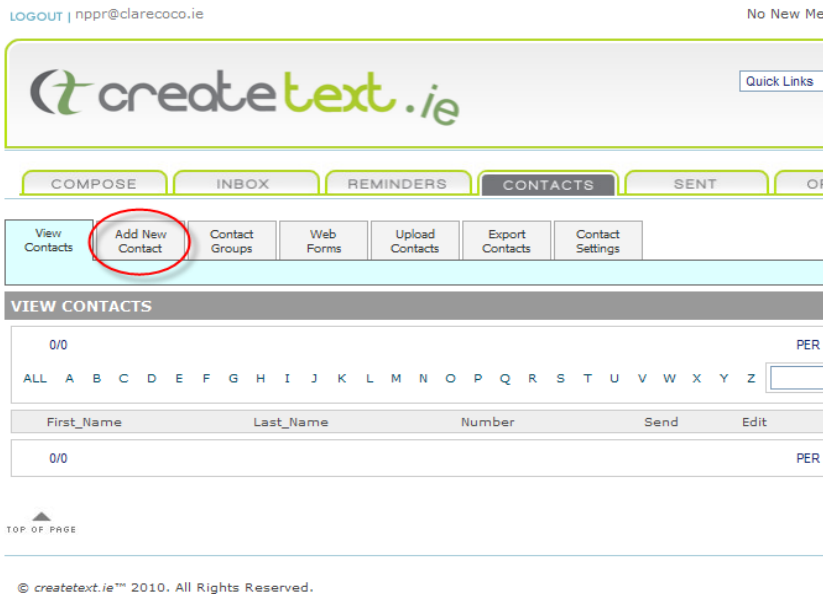
You can choose to upload contacts singly or upload them in larger groups from an Excel or csv file (See step 4.2) – whatever best suits your needs.

4.1 Upload Single Contacts

1. Click the **CONTACTS** tab.



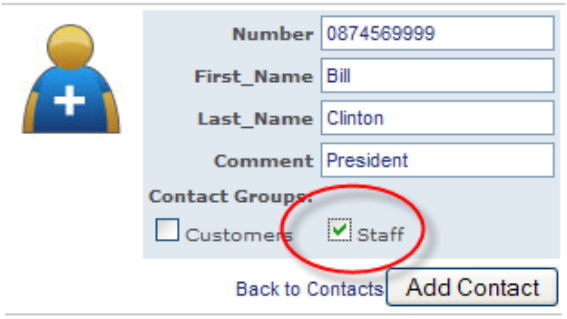
2. Click **Add New Contact.**



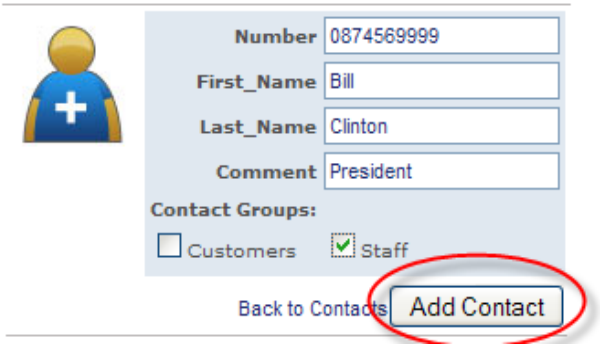
3. Enter the contact's details.

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

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 instructions in Section 3, **Create Groups.**



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



You have now added your contact to your **Create*Text*** account.

4.2 Upload Multiple Contacts from an Excel Sheet

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 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*

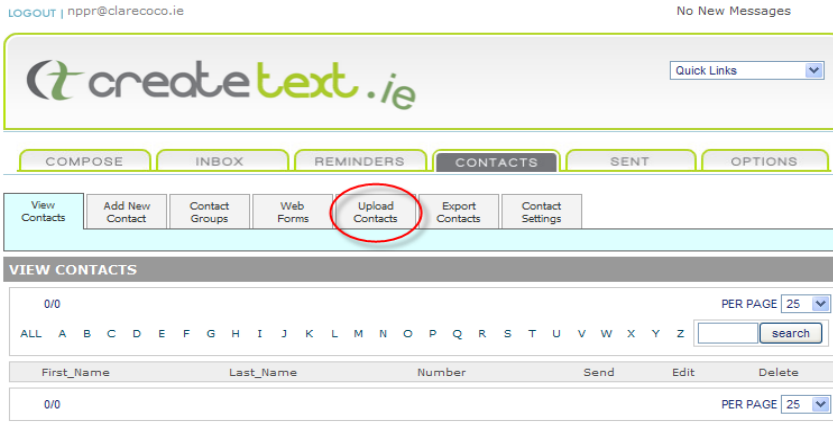
Last Name: *Last name of the person to be added to the account*

Number: *With or without the international dialling code*

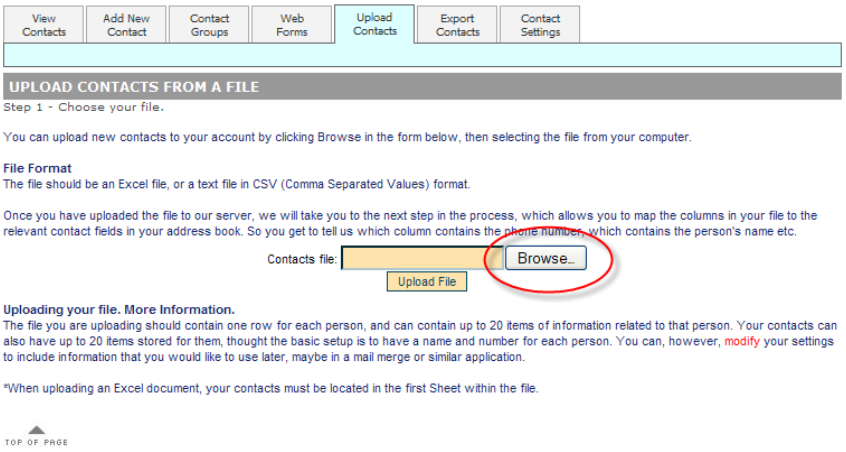
When your Excel worksheet is complete, save it in a location that you can identify easily on your computer.

2. Click the **CONTACTS** tab

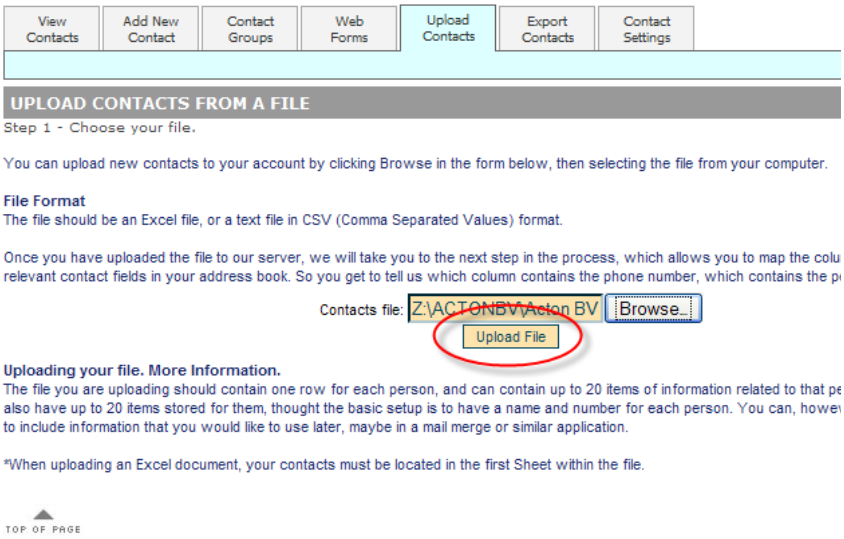
3. Click **Upload Contacts**



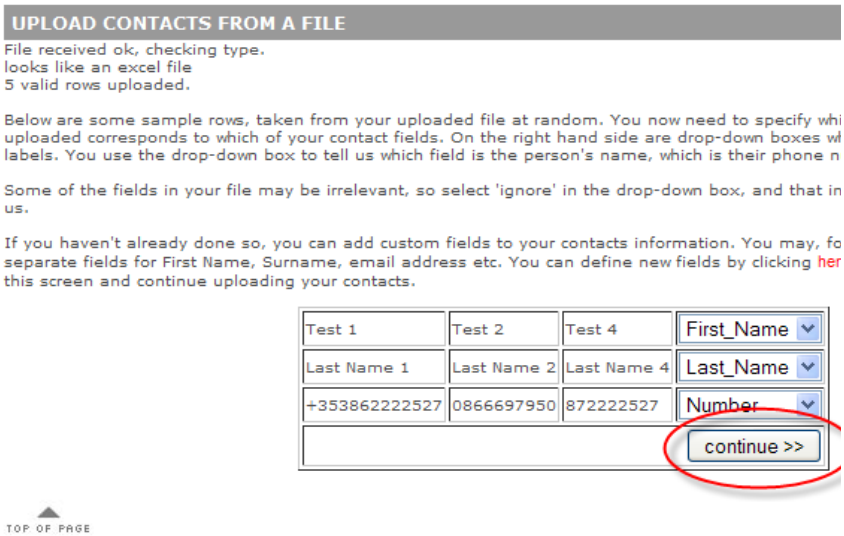
4. Click the **Browse** button to locate file.



5. Click the **Upload File** button.



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



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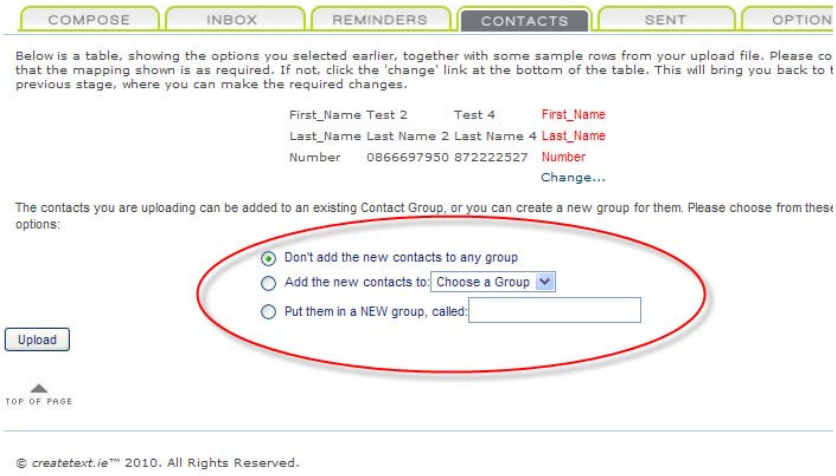
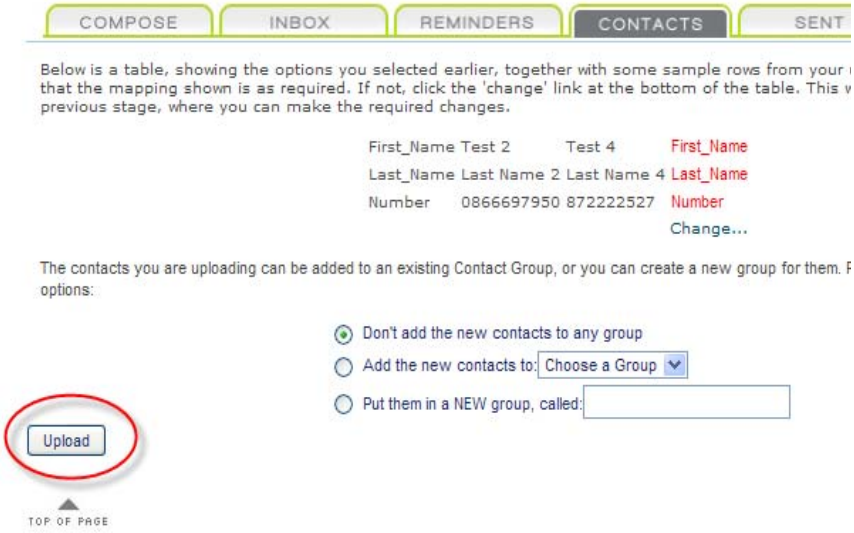
7. Decide if you want to add the new contacts to an existing group and select the appropriate options.



8. Click **Upload.**



5 Send Messages

5.1 Send a 1-Way Message to a Single Contact

A 1-way message is a message that cannot be replied to. It carries your group/organisation/company tag or identification. Here, we show you how to send a 1-way message to a single contact.

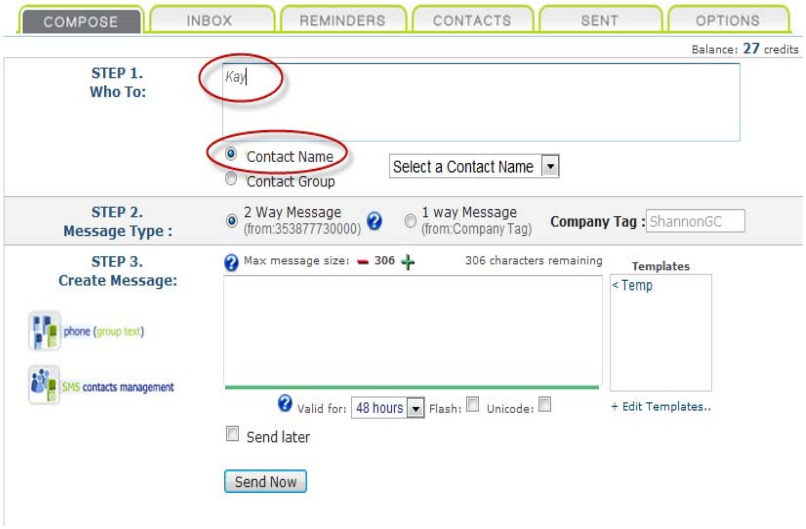
1. Click the **COMPOSE** tab in **Create*Text*.ie**.

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

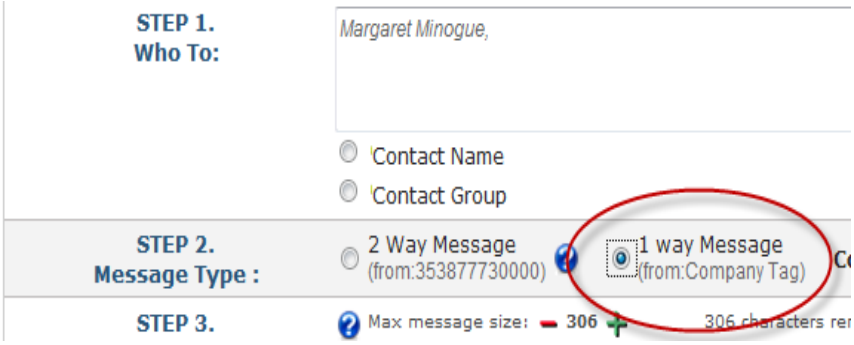
   a) Select **Contact Name** and choose from your list of contacts, or

   b) type the contact's name and choose from the predictive list that appears, or

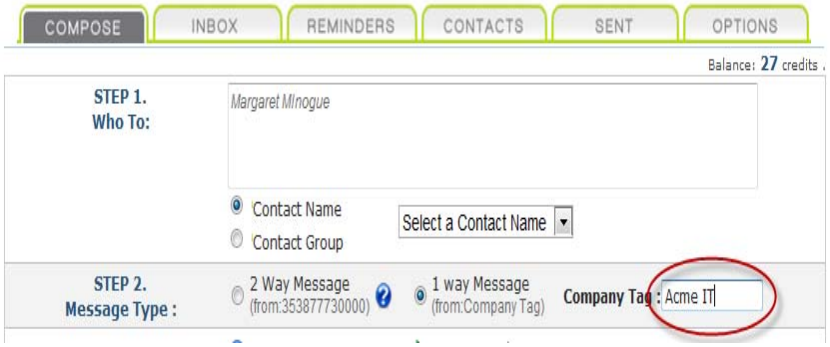
   c) simply enter the contact's number if it's not already in the system.



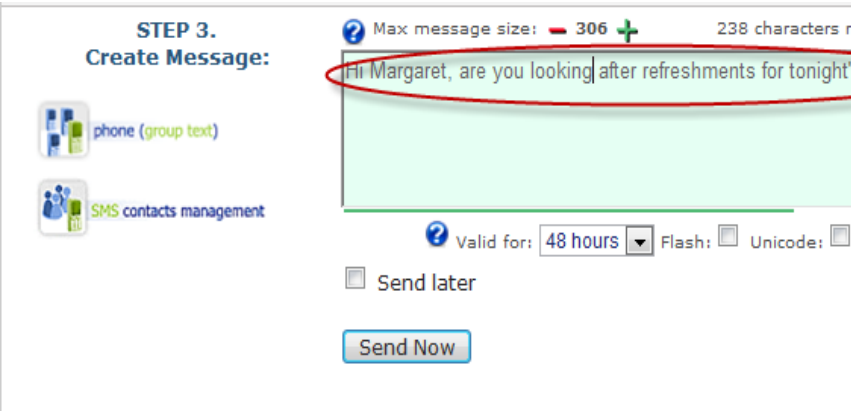
3. In the **STEP 2 Message Type**: panel, select **1 Way Message**.



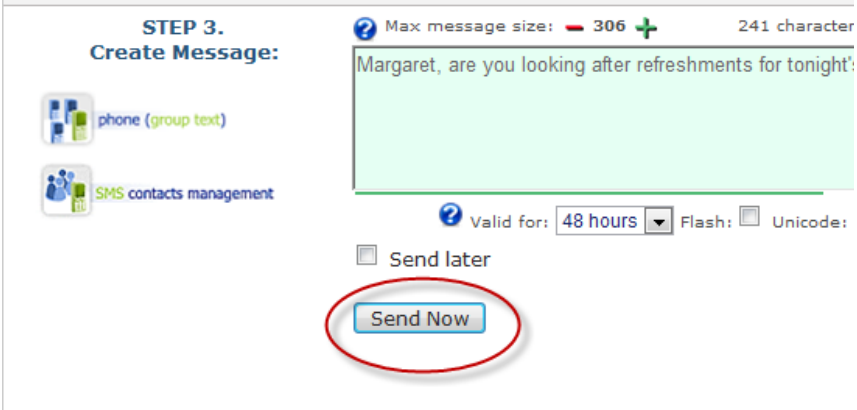
4. Enter a company tag – the name of your organisation. This can be up to 11 characters in length.



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

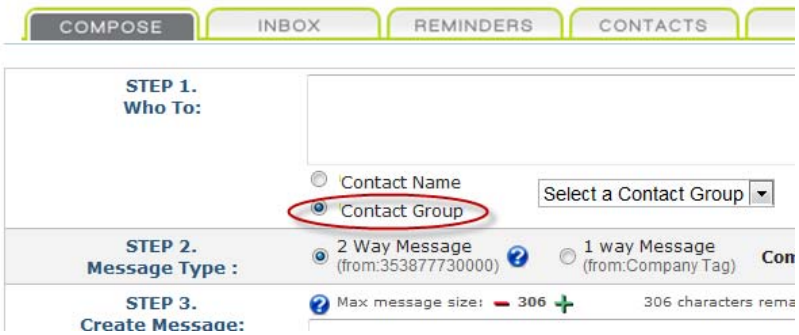


6. To send your message, click the **Send Now** button.

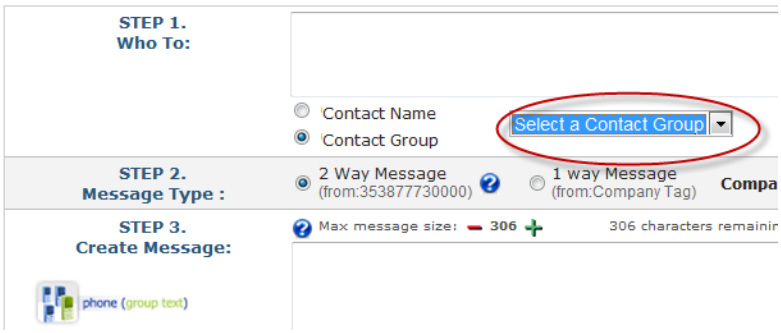


5.2 Send a 1-Way Message to a Group

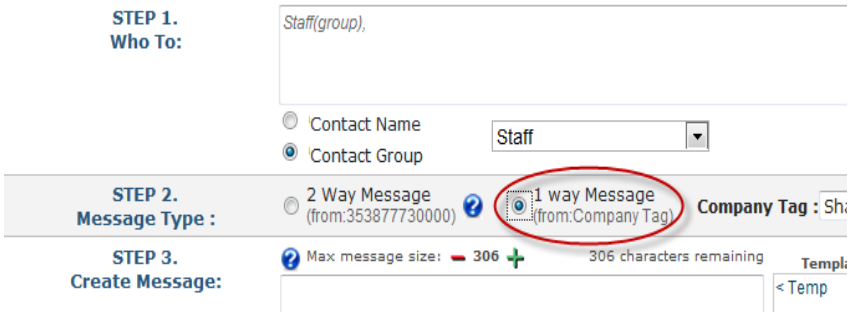
1. Select the **COMPOSE** tab in **Create*Text***.ie. In the **STEP 1 Who To**: panel, select the **Contact Group** option.



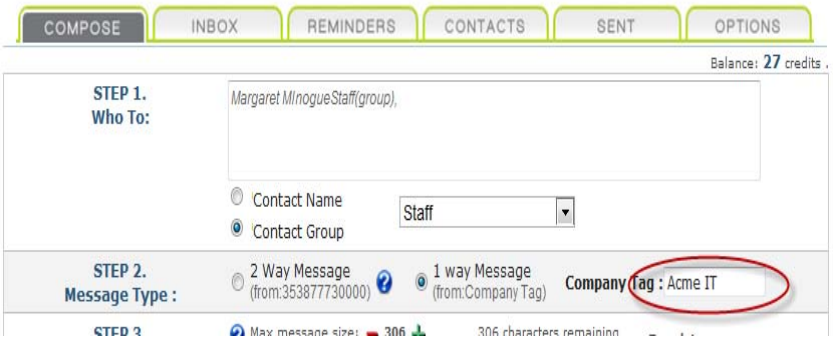
2. Select the name of the group from the list.



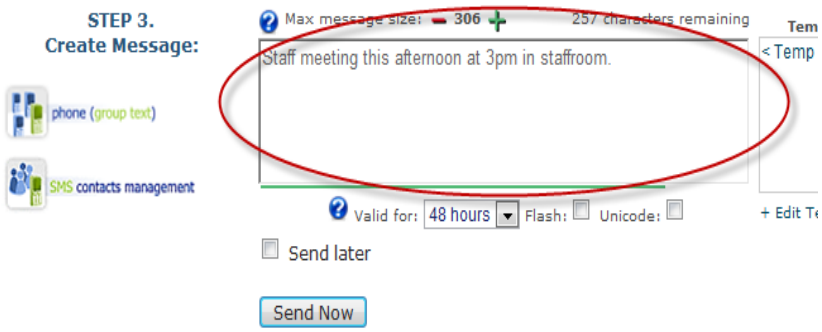
3. In **Step 2: Message Type**, click the 1-Way option.



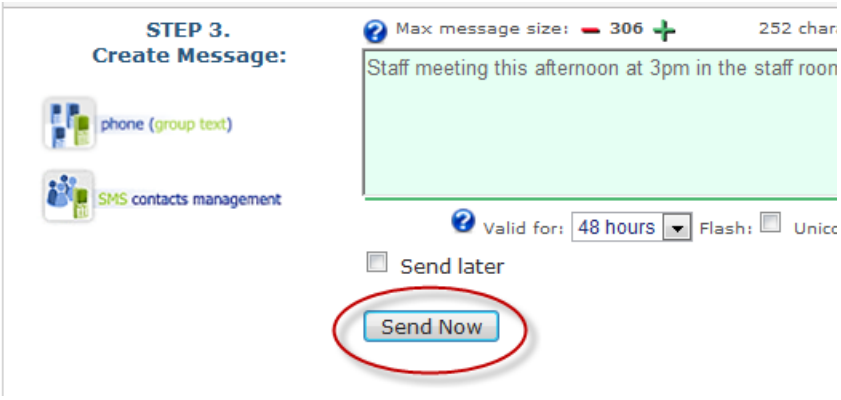
4. Insert a **Company Tag** – the name of your organisation. This can be up to 11 characters in length.



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



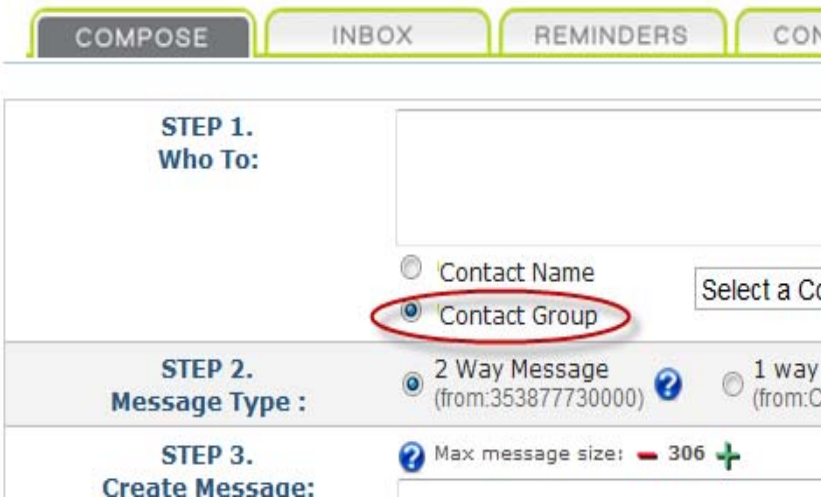
6. To send your message now, click the **Send Now** button.



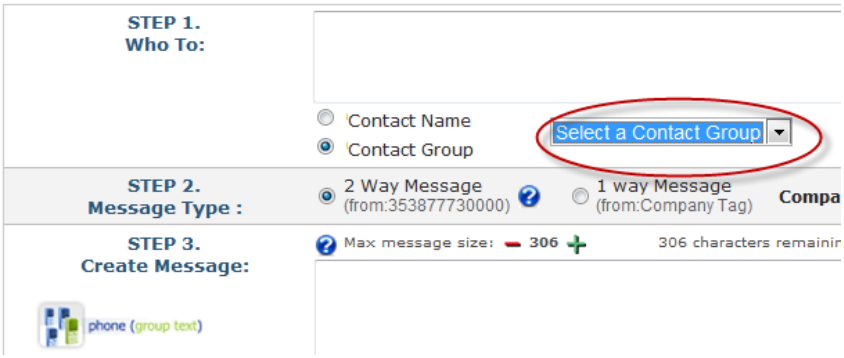
5.3 Send a 2-Way Message to a Group

A 2-way message is a message to which your contacts ***can*** reply. This message will not carry your group or company tag. A 2-way message is useful when you need to gather feedack, votes or opinions from your contacts. You will not be charged for their replies.

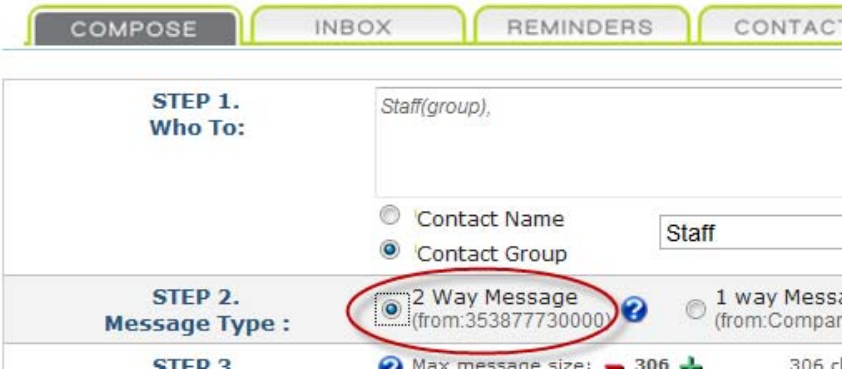
1. Click the **COMPOSE** tab in Create*Text*.ie. In the **STEP 1 Who To**: panel, select the **Contact Group** option



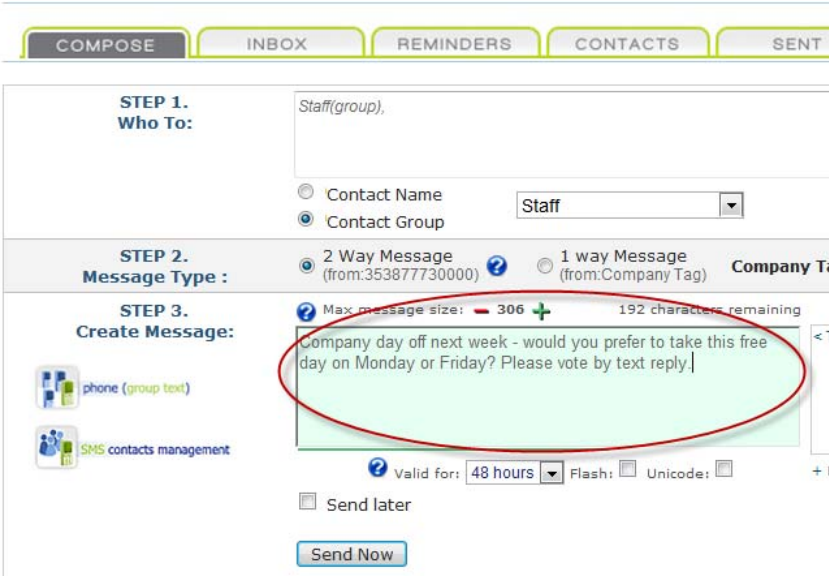
2. Select the name of the group from the list.



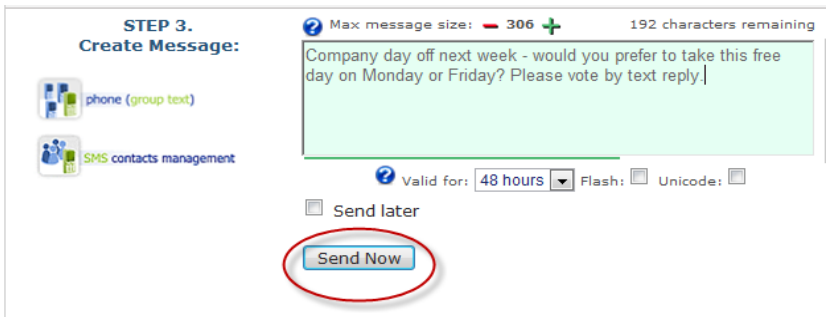
3. In **Step 2: Message Type**, click the 2-Way option.



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.

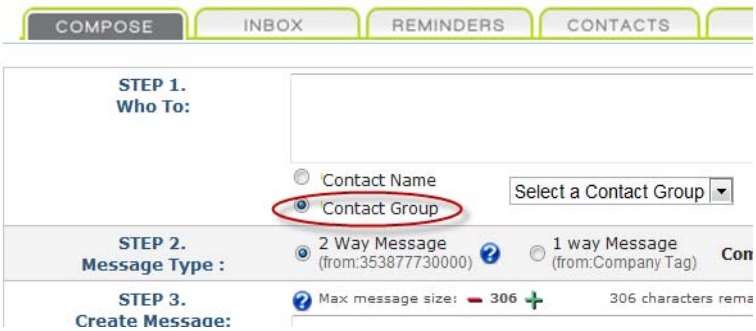


5. To send your message now, click the **Send Now** button.

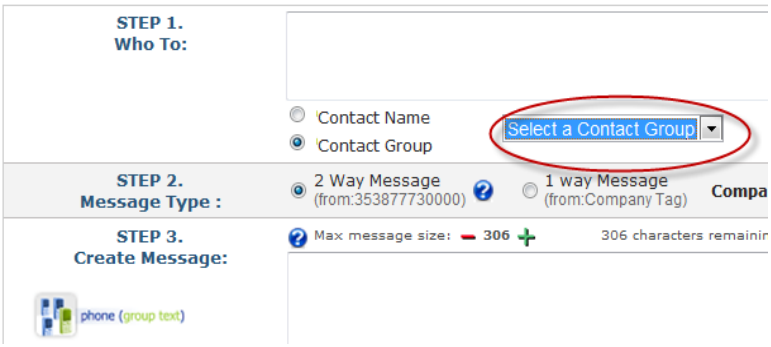


5.4 Send a 1-Way Message to Several Groups

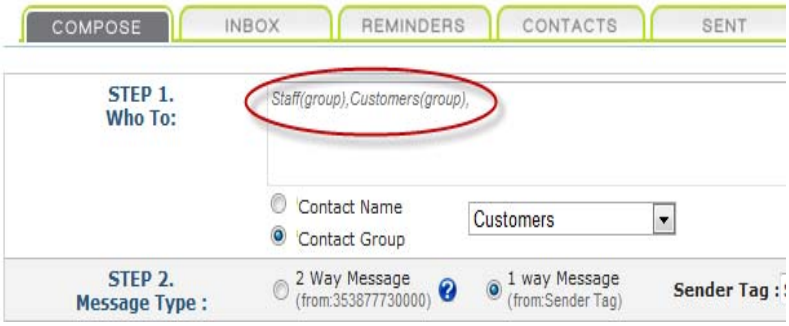
1. Click the **COMPOSE** tab in **Create*Text*** .ie. In the **STEP 1 Who To**: panel, select the **Contact Group** option



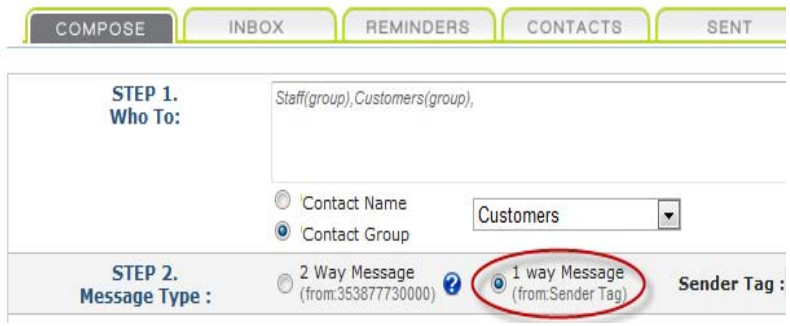
2. Select the name of one of the groups from the list of your contact groups. Repeat this step until you have selected all the groups you want to contact.



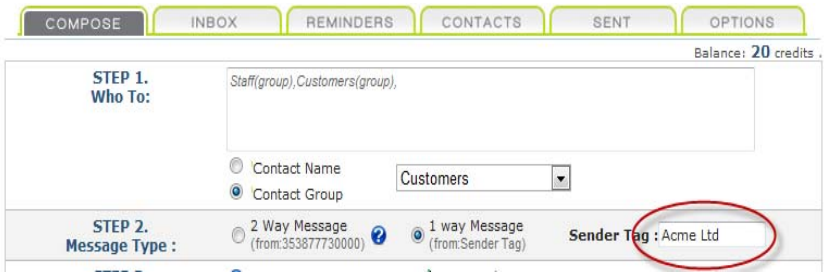
3. The group names you have selected will appear in the **Who To:** panel. You can add as many groups as you need to.



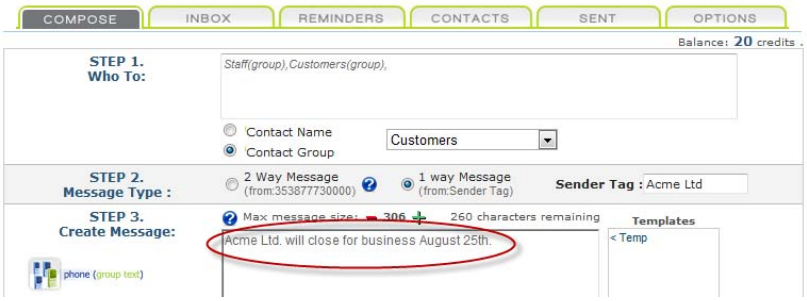
4. In **Step 2: Message Type**, click the 1-Way option.



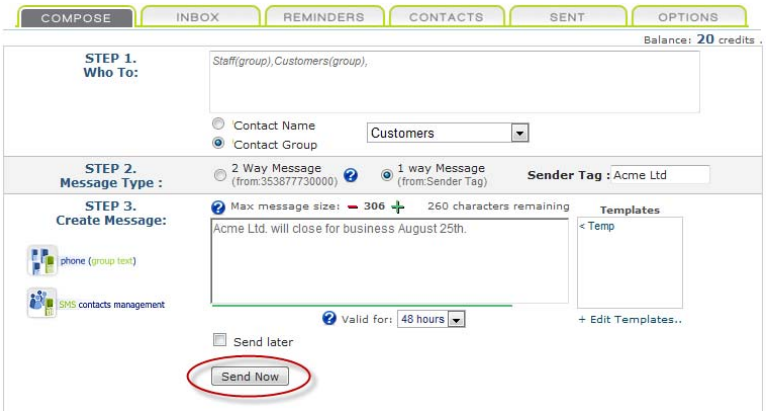
5. Insert a **Company Tag** – the name of your organisation. This can be up to 11 characters in length.



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

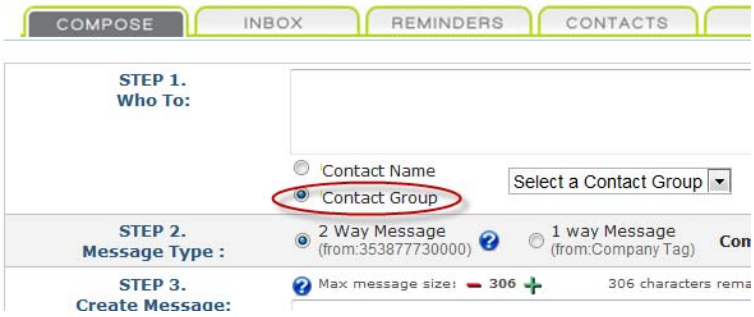


7. To send your message now to the groups you have selected, click the **Send Now** button.

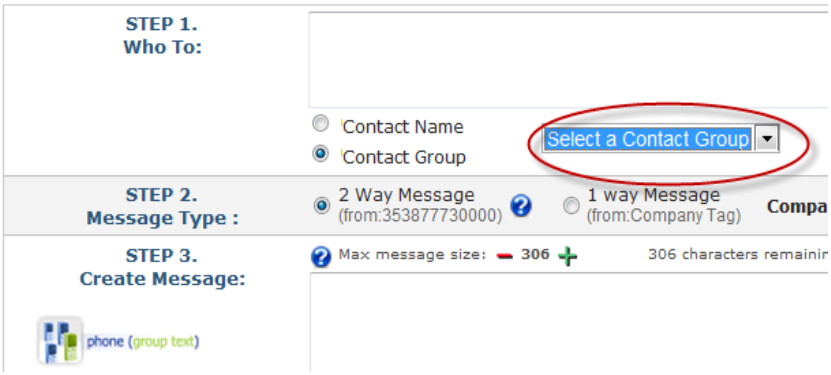


Send a 2-Way Message to Several Groups

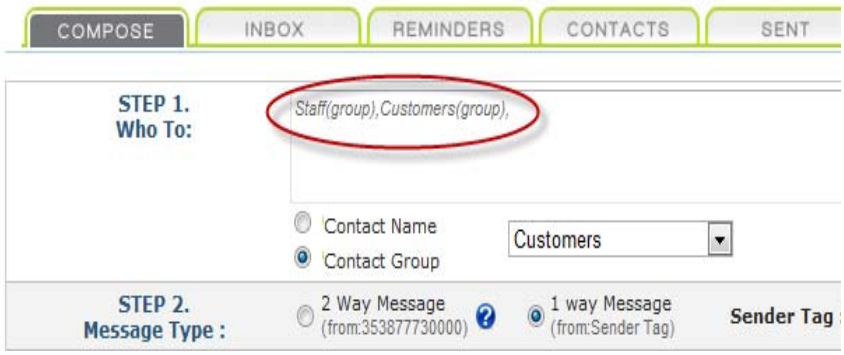
1. Click the **COMPOSE** tab in Create*Text*.ie. In the **STEP 1 Who To**: panel, select the **Contact Group** option



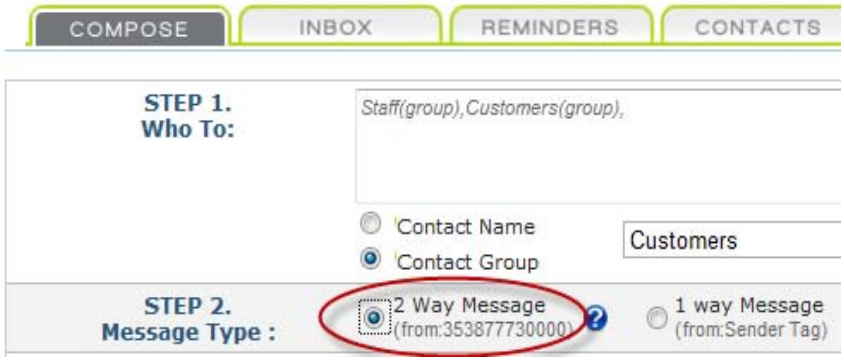
2. Select the name of one of the groups from the list of your contact groups. Repeat this step until you have selected all the groups you want to contact.



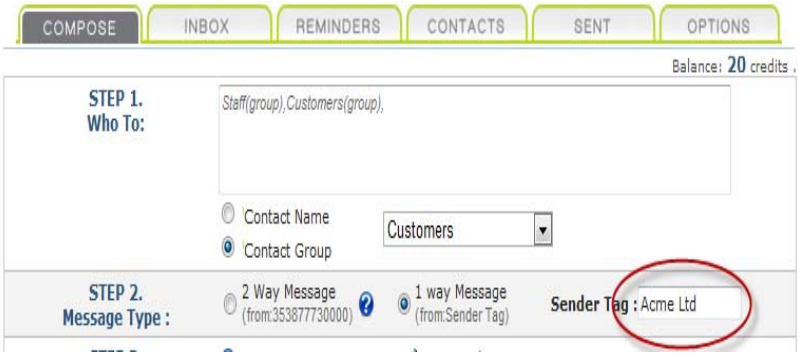
3. The group names you have selected will appear in the **Who To:** panel. You can add as many groups as you need to.



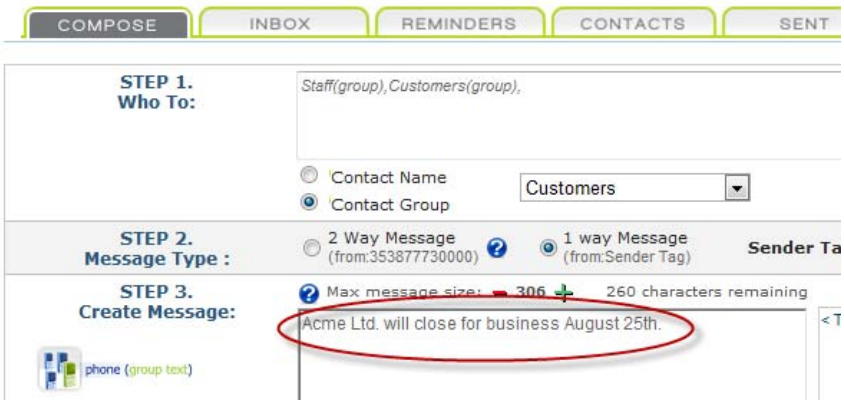
4. In **Step 2: Message Type**, click the 2-Way option.



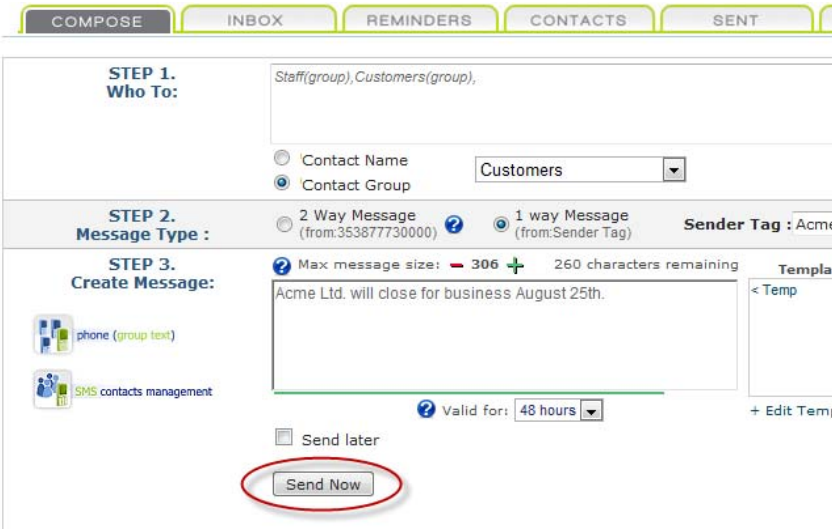
5. Insert a **Company Tag** – the name of your organisation. This can be up to 11 characters in length.



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



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

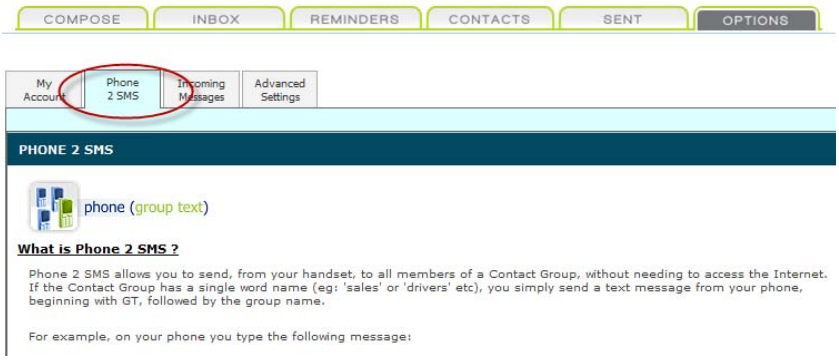


5.5 Sending Messages to Groups from your Phone

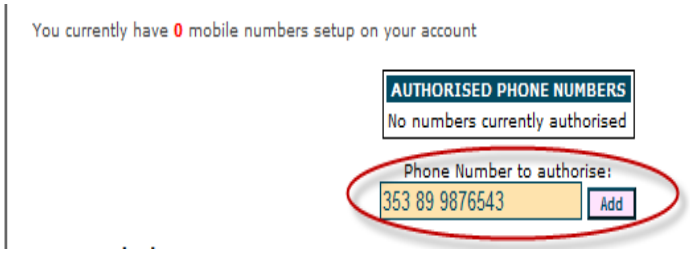
You can quickly & easily send text messages to your groups from a mobile phone without the need to access to a computer. This is ideal if you need to get in touch with a large number of people quickly. First, authorise your phone in **Create*Text*.ie** – you need only do this once

5.5.1 Authorise Your Mobile Phone from Group Texting

1. In the **OPTIONS** tab on Create*Text*.ie, click **Phone 2 SMS**.



2. Enter your number in the **Phone Number to authorise** box and click the **Add** button.



Your mobile phone number has now been authorised.

5.5.2 Sending a group message from your Mobile Phone

1. Once you have authorised your mobile phone (see section 5.6), begin your text message with the letters **GT**, followed by the one-word name of your group, e.g. **Staff**.

2. Continue by entering your message, for example, " **GT Staff Meeting cancelled tomorrow morning (Monday Jan 6) due to flight delays**."

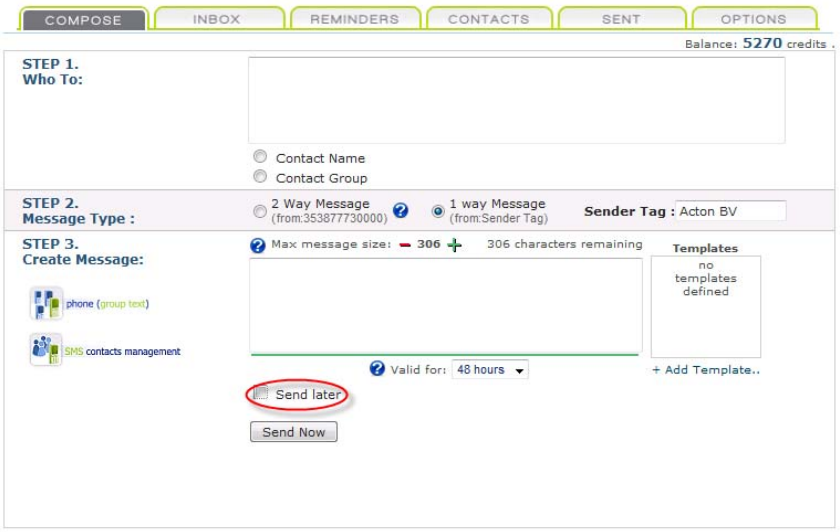
   In this example, every member of your Staff contact group will receive the message: "Meeting cancelled tomorrow morning (Monday Jan 6) due to flight delays".

3.

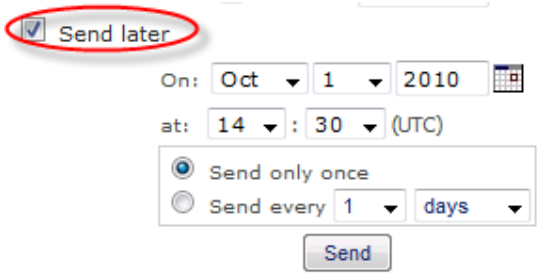
5.6 Schedule Messages

With CreateText.ie, you can compose your message now and schedule it to be sent later. This is especially useful if you are sending messages to a different time zone, or if you are simply going to be busy when the message is to be sent.

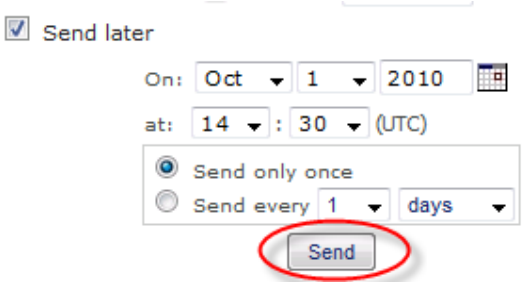
1. Simply compose your message as normal. However, instead of clicking the **Send Now** button, select the **Send later** checkbox.



2. On the calendar that appears, select the date and time you would like your message to be sent.



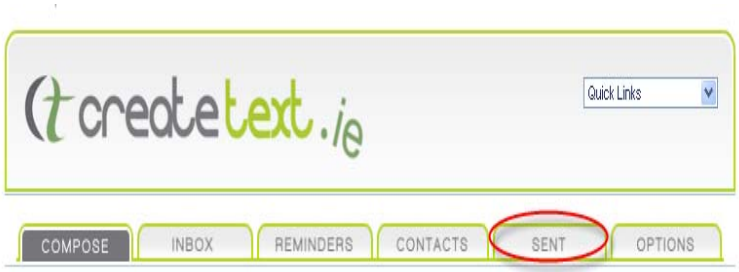
3. Click the send button. Your message will be saved and then sent at the time and date you specified.



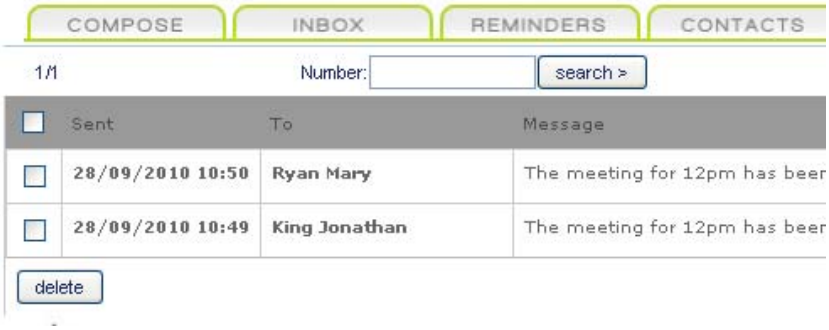
5.7 View Send Reports

If you would like to see what messages you have sent and to whom, you can check this easily

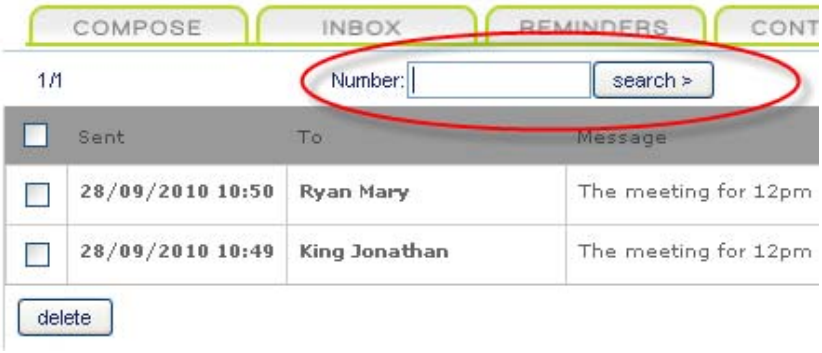
1. Once you have logged in, click the SENT tab on **Create*Text*.ie**.



2. A table appears giving details of the message, when it was sent, to whom and whether it has been delivered. You also have to option to delete sent messages in the column on the right.



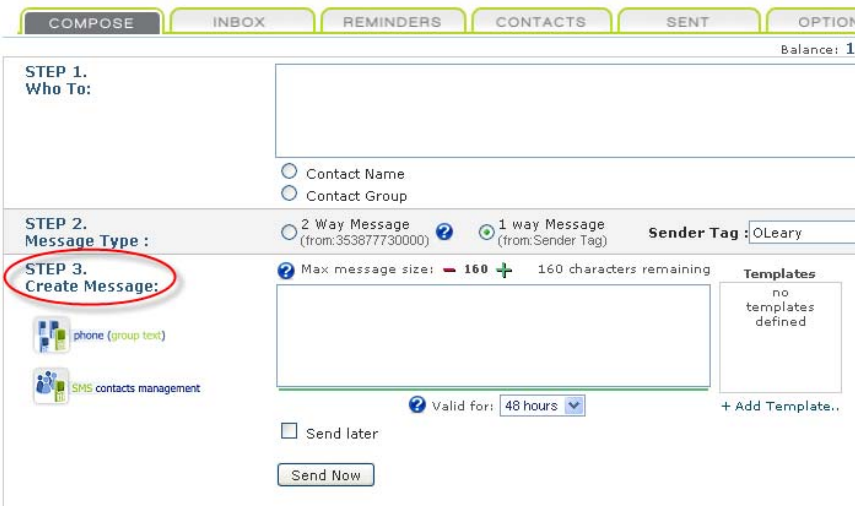
3. If you'd like to see the messages that were sent to a specific number, you can do this by entering the number in the Number: box and clicking the search > button. The messages sent to that number will appear.



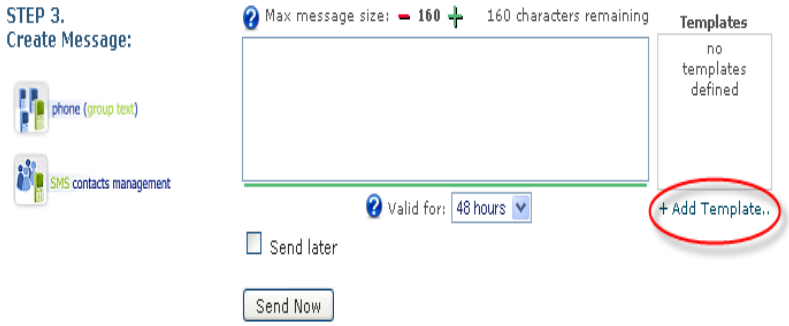
5.8 Create Templates

If you find that you send the same message regularly, save it as a template.

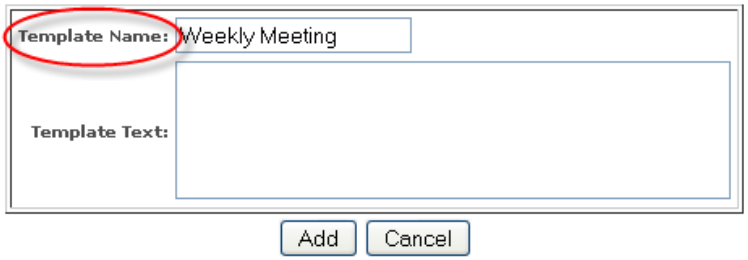
1. On the **COMPOSE** tab of Create*Text*.ie, go to **Step 3: Create Message**:



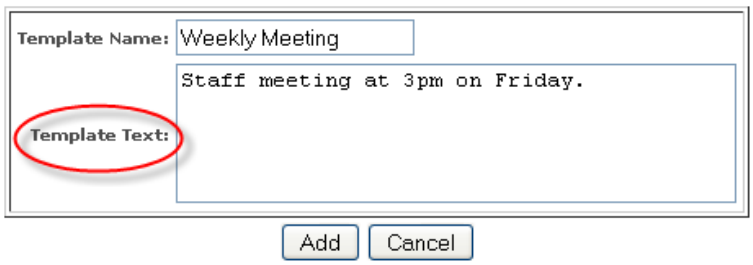
2. On the right of this panel, click **+Add Template**.



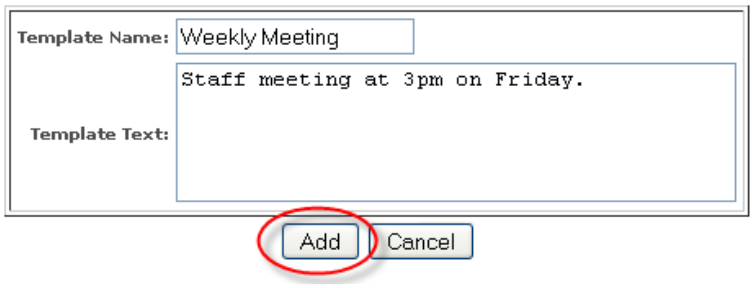
3. In the screen that appears, type in the name of your template in the **Template Name:** textbox.



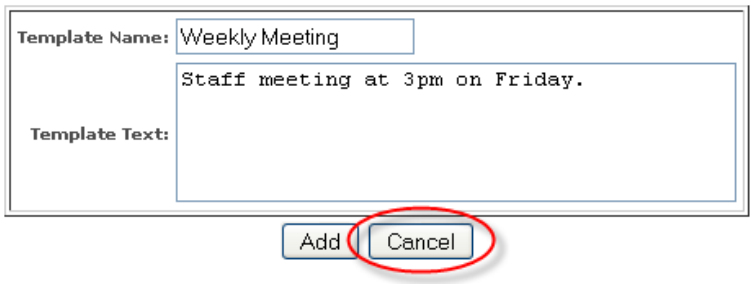
4. Enter your template text in the **Template Text:** textbox.



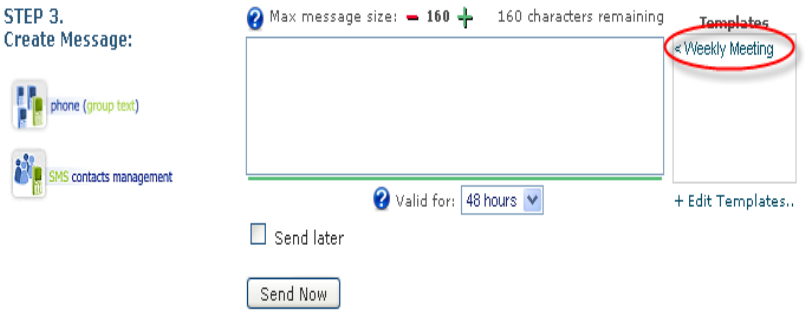
5. Click the **Add** button to add your new template to your list of templates.



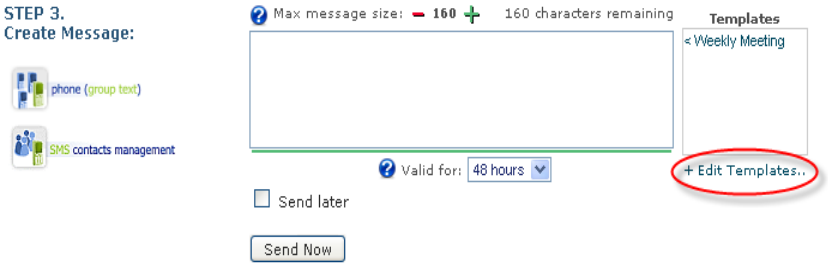
6. If you want to revert to the **COMPOSE** tab without saving any changes, click the **Cancel** button.



7. Once you have added your template, it appears in the **Templates** section of **Step 3: Create Message**: on the **COMPOSE** tab. Click the template to select it for use in a text message.



8. To change your templates at any time, click **+Edit Templates** in the **Step 3: Create Message**: section of the **COMPOSE** tab.



6 Receive Replies

How do I see the replies I receive?

By default, all your replies will be sent to your online **Create*Text*.ie** account where you can view them conveniently. You can also select to have replies sent directly to your mobile phone.

6.1 View Replies Online

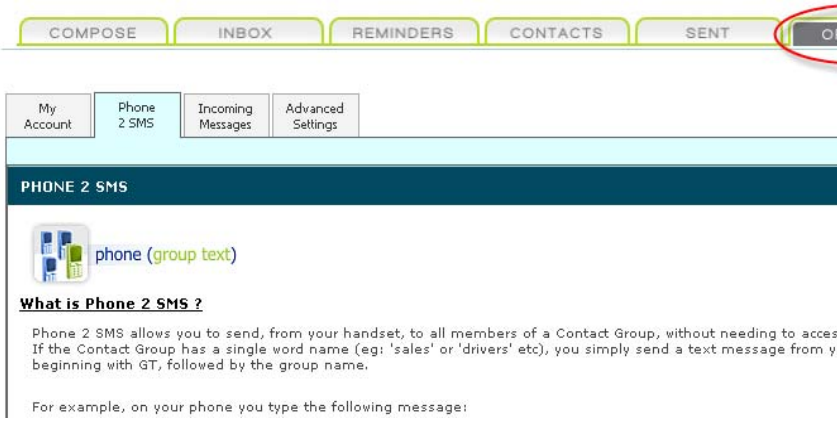
1. Once you have logged in to **Create*Text*.ie**, click the **INBOX** tab.

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

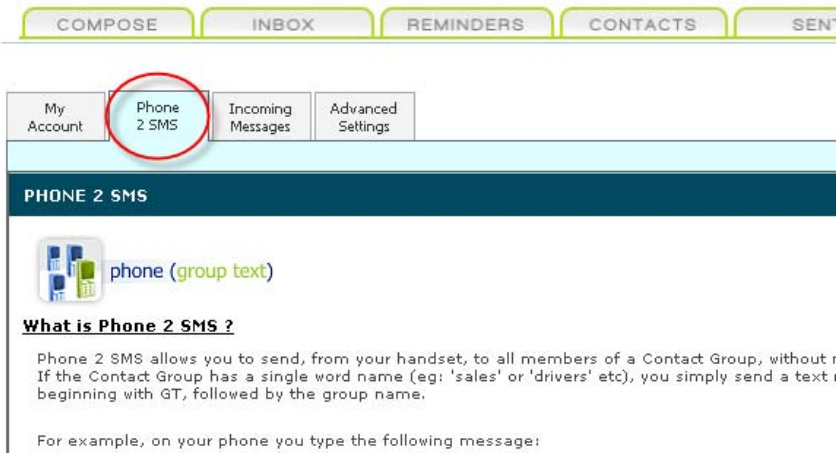
6.2 Receive Replies on Your Mobile Phone

In order to receive replies to your mobile phone, you need to set your mobile phone number as the number from which the message originates. You can do this simply.

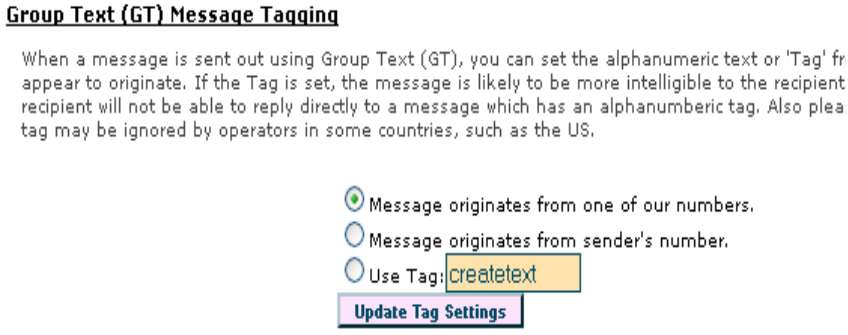
1. Before sending your original message, log in to **Create*Text*.ie** and click the **OPTIONS** tab.



2. Click the **Phone 2 SMS** tab.



3. Scroll down to the **Group Text (GT) Message Tagging** section.



4. Select the option **Message originates from sender's number** and click the **Update Tag Settings** button.

You will now see your contacts' replies to your 2-way message on your mobile phone. Replies will also be sent to your online **Create*Text***.ie account.

7 Manage Contact Information

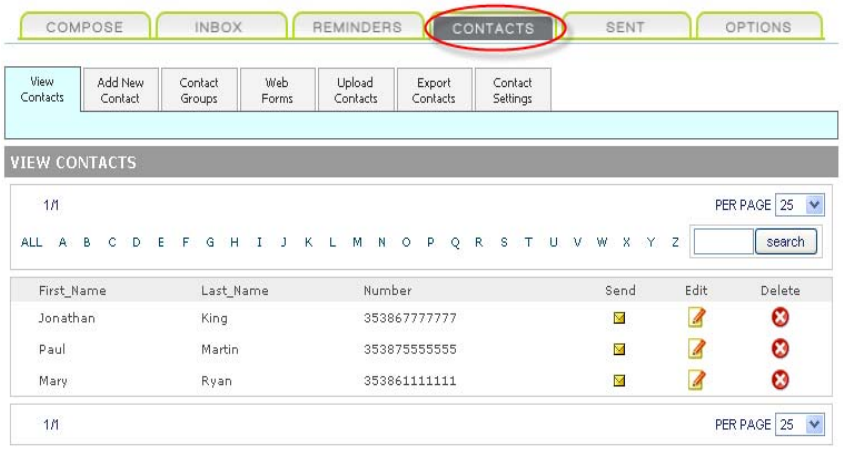
In what ways can I tailor my contact information to suit my needs?

With **Create*Text***.ie, you control your contact information.

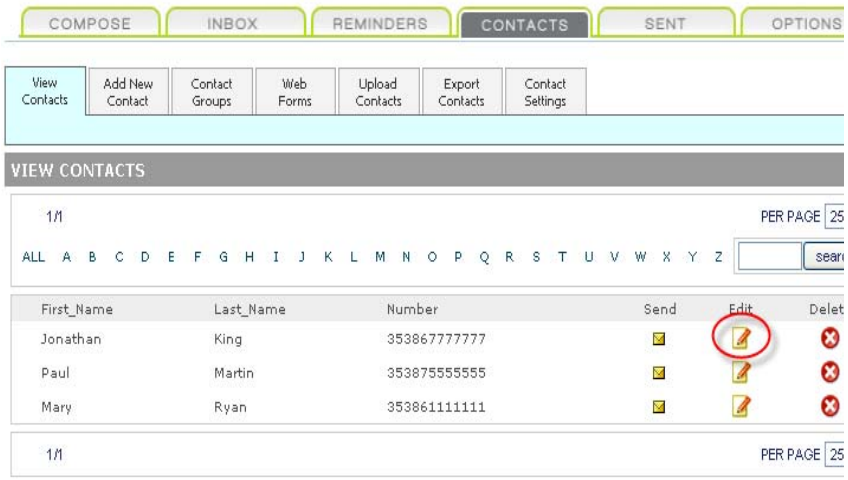
- You can at all times edit the information you hold on your contact, so that if they change phone number, for example, you can update the information speedily.
- You can include additional information fields so that you can gather even more useful information on your client, for example, their preferences, the number of people in their family – whatever you need to know.
- **Create*Text*** also makes it easy for you to ensure that when your contacts opt out, they receive no more messages from you.
- In addition, with **Create*Text***.ie, you can export contact information quickly and conveniently.

7.1 Edit Contact Information

1. Once you have logged in to **Create*Text***.ie, click the **CONTACTS** tab. A list of your contacts appears.



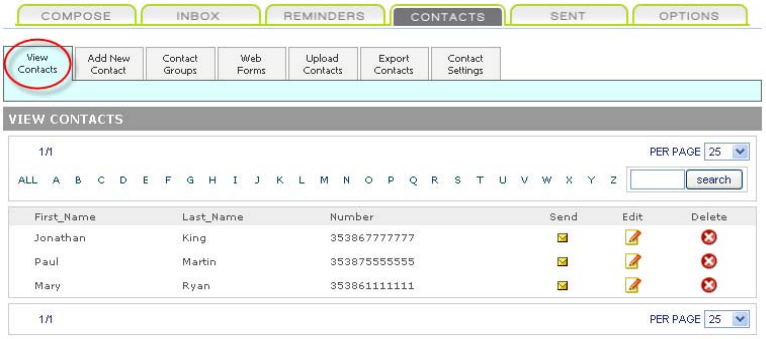
2. Find the contact whose information you want to update, and click the **Edit** button towards the right-hand side of that row.



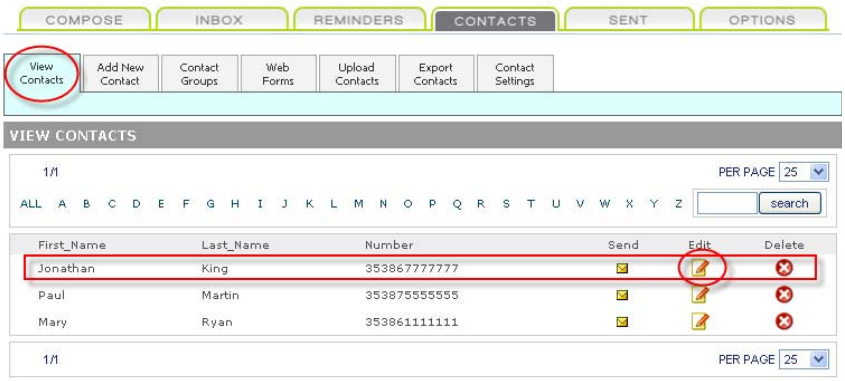
3. On the **EDIT A CONTACT** panel that appears, make the necessary changes and click the **Update** button. Your changes are now saved.

7.2 Assign Contacts to 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 you want to edit.

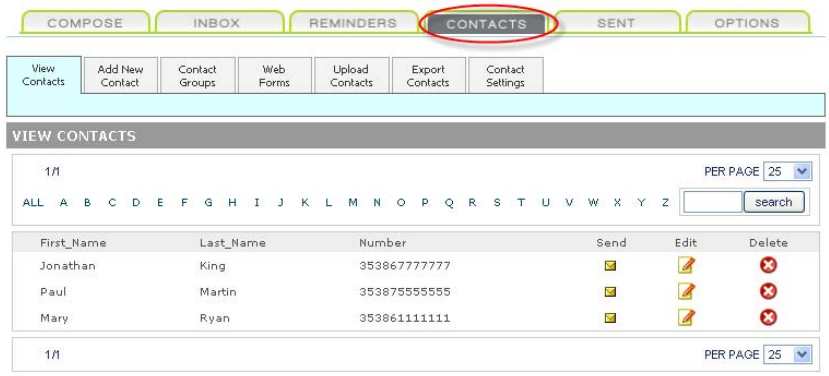


3. In the panel that appears, select the group (or groups) to which you want to assign your contact – in this case, **Minor Team**. You can assign a contact to as many groups as necessary.

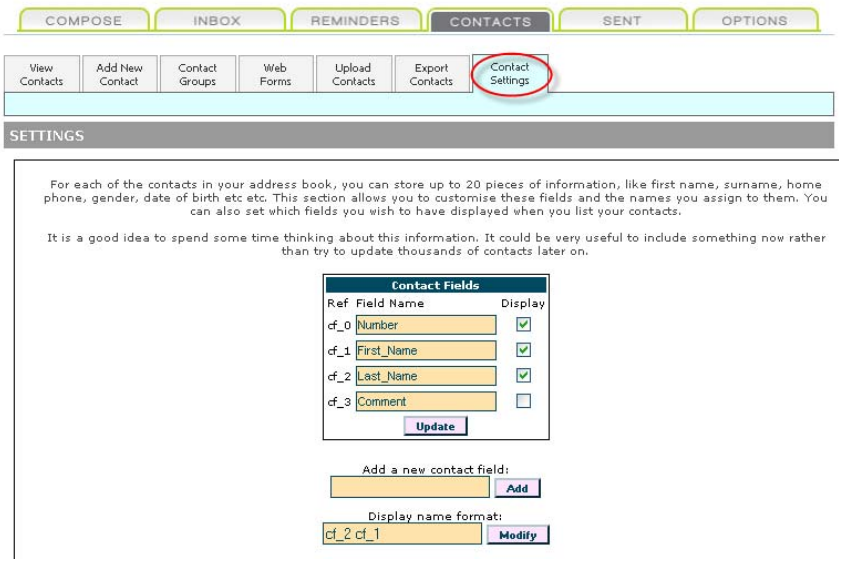
4. Click the **Update** button to save your changes.

7.3 Create Additional Contact Information Fields

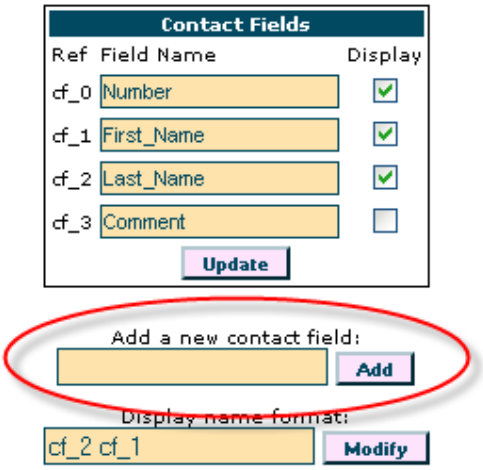
1. Once you have logged in to Create*Text*.ie, click the **CONTACTS** tab. A list of your contacts appears.



2. Click the **Contact Settings** tab.



3. Enter the name of the new contact field you want to add and click the **Add** button. You can repeat this step until you have up to 20 contact fields.

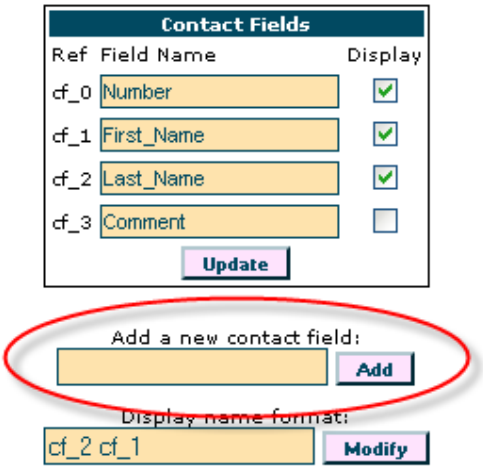


7.4 Manage Opt Outs

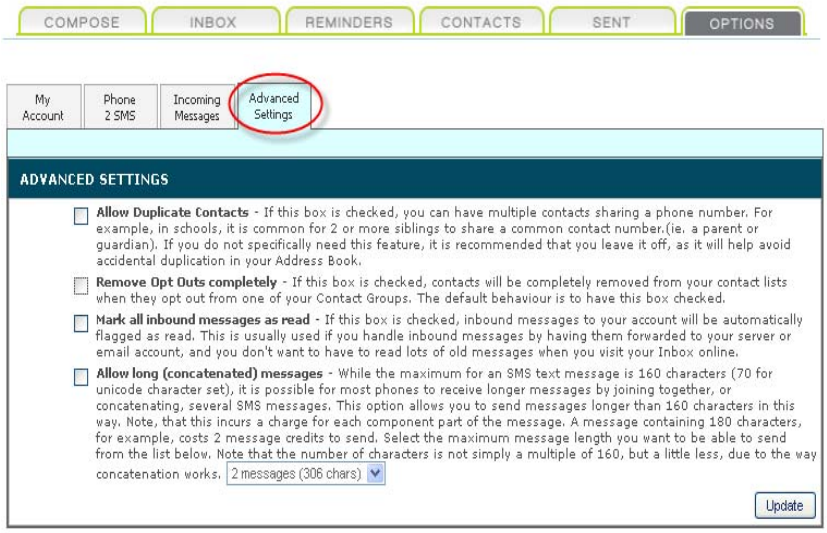
Any one of your contacts can opt out by using the **STOP** keyword. Once that STOP message has been received, no further messages will be sent to that number. In addition, **Create*Text*.ie** prevents you from accidentally uploading opted-out numbers from Excel or CSV files.

To ensure that these **Create*Text*.ie** features are enabled, please carry out the following:

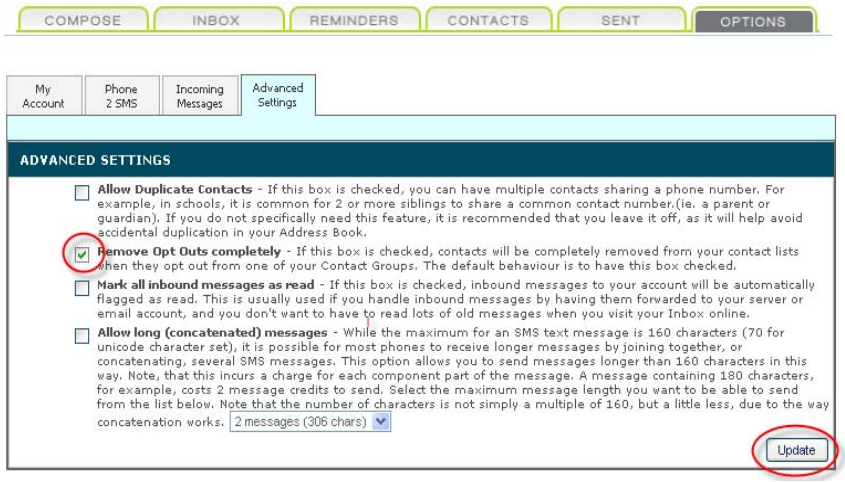
1. Once you have logged in to Create*Text*.ie, click the **OPTIONS** tab.



2. Choose **Advanced Settings** from the tabs that appear.



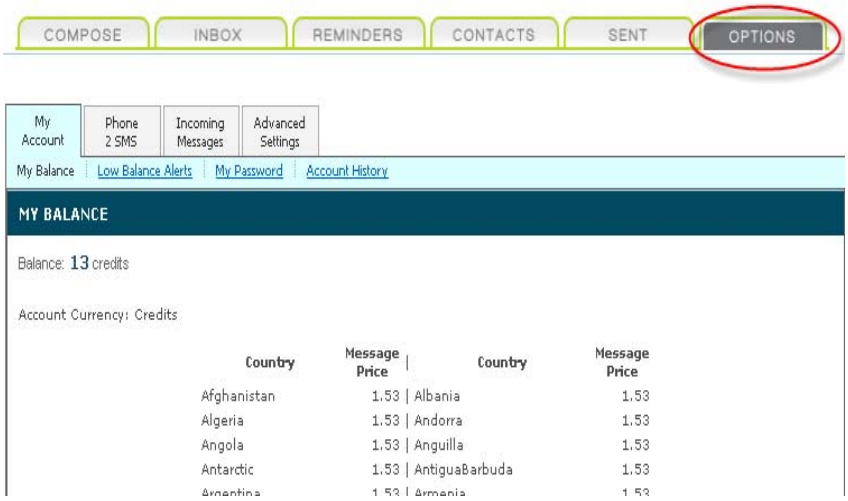
3. To remove Opt Outs completely from your contacts list, ensure that the checkbox beside **Remove Opt Outs completely** is ticked and click the **Update** button.



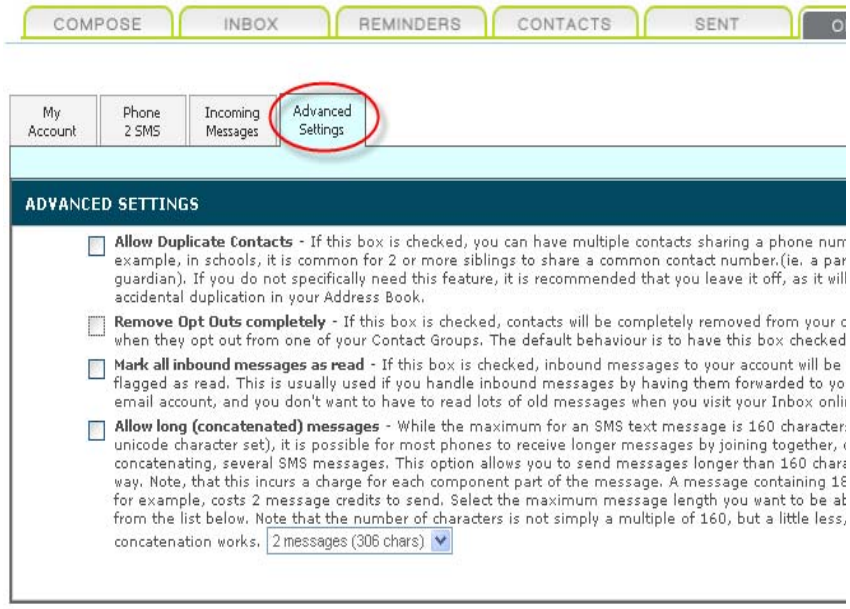
7.5 Prevent Message Duplication

Create*Text*.ie saves you credits when we can. In a situation where, for example, you have three children in a school connected to one contact number, we can ensure that only one message is sent and not three. To enable this functionality, see below:

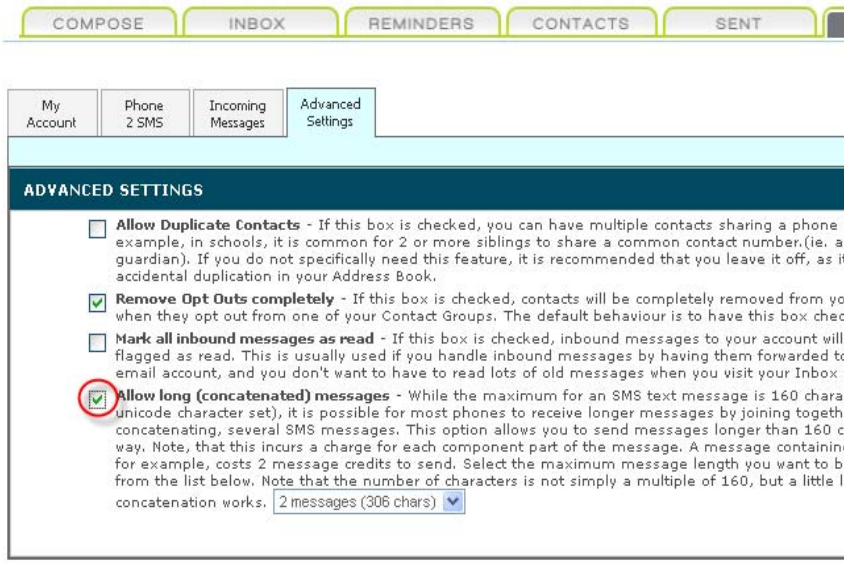
1. Once you have logged in to **Create*Text*** .ie, click the **OPTIONS** tab.



2. Choose **Advanced Settings** from the tabs that appear.



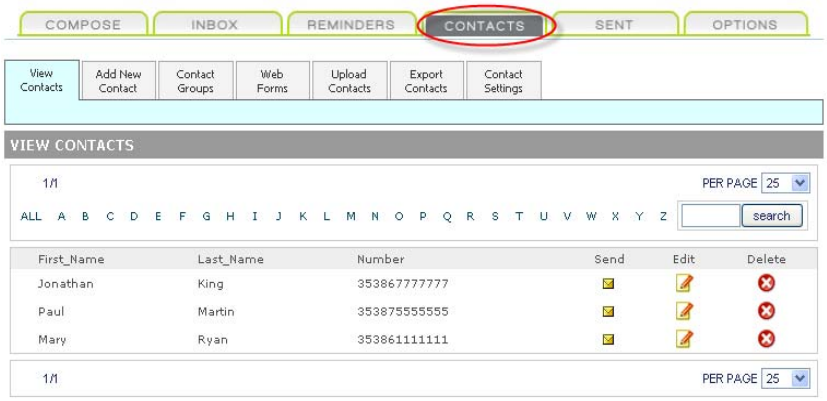
3. To ensure that multiple contacts sharing one number receive messages only once, tick the **Allow Duplicate Contacts** checkbox and click the **Update** button.



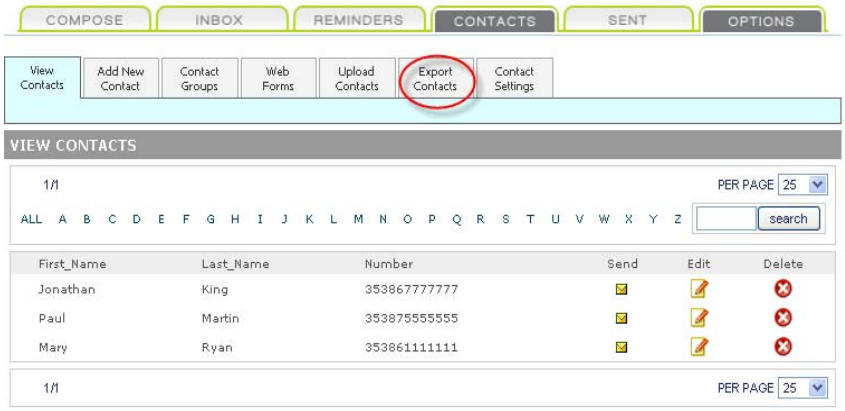
7.6 Export Contact Information

You can easily extract contact information you hold in your **Create*Text***.ie account to use it for other purposes .

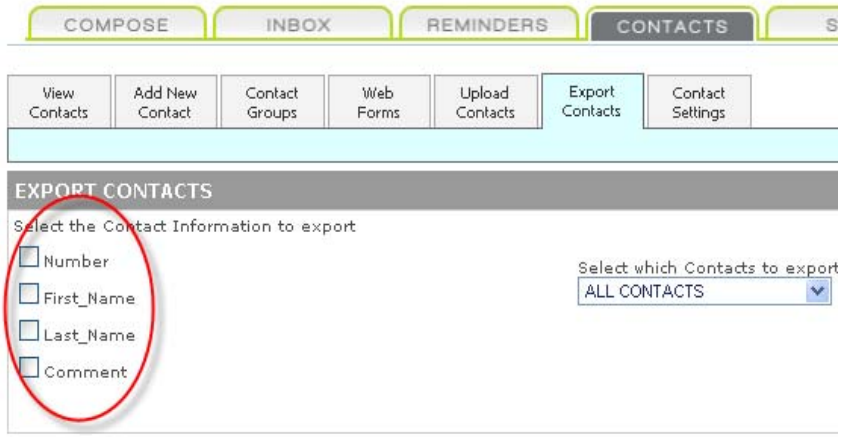
1. Once you have logged in to **Create*Text***.ie, click the **CONTACTS** tab.



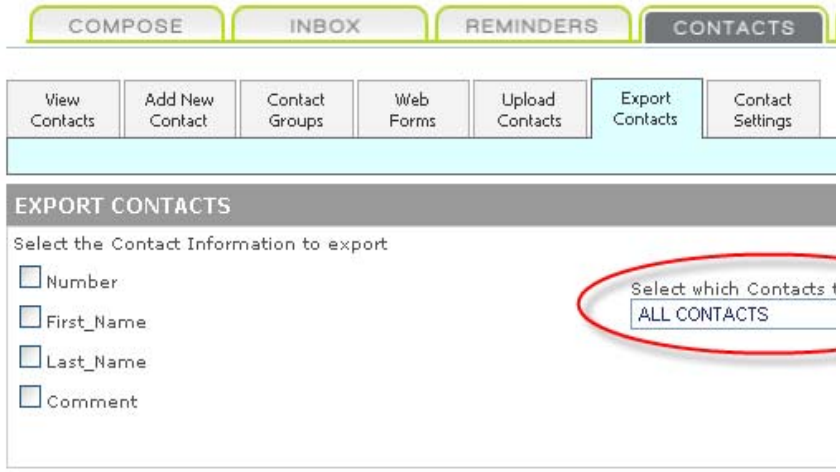
2. Choose **Export Contacts** from the tabs that appear.



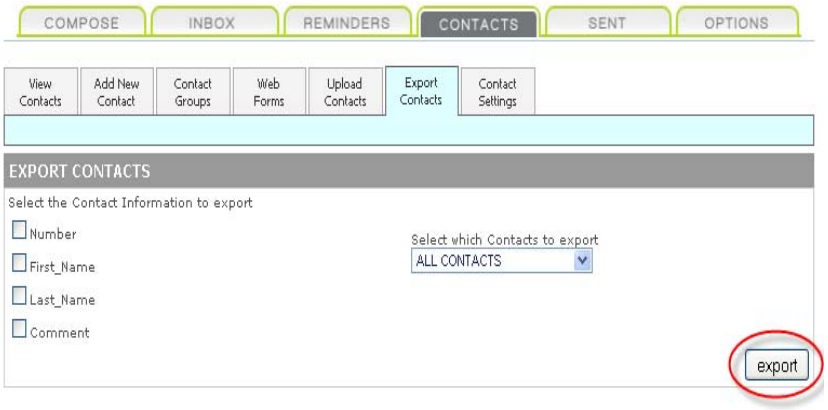
3. To the left of the screen, select the types of information you want to export.



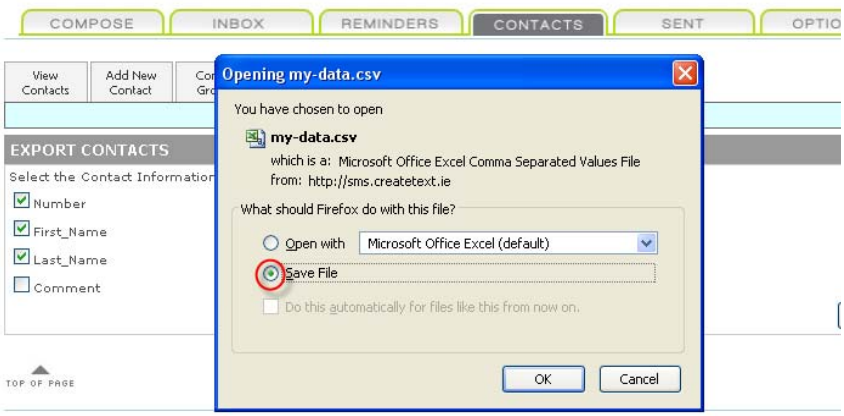
4. To the right of the screen under the heading **Select which Contacts to export**, choose the contact group whose information you want to export.



5. Click the **export** button



6. Click the **Save** button onthe dialog box that appears and save the file in a location you can find easily.

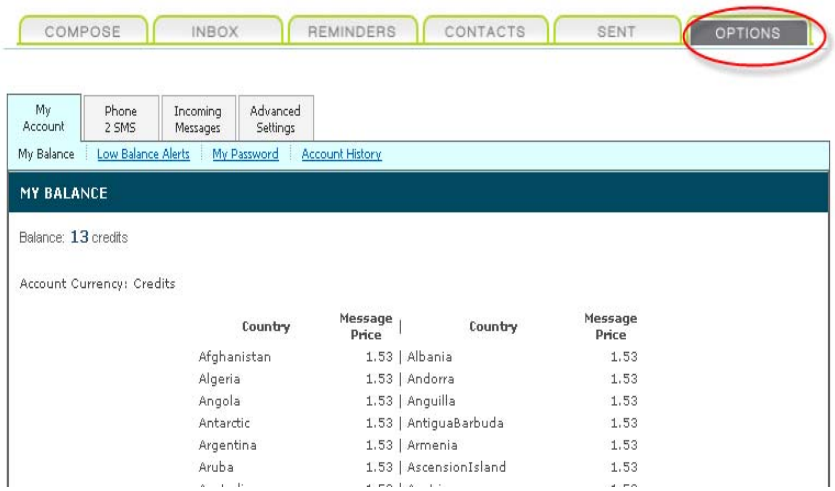


8 My Account

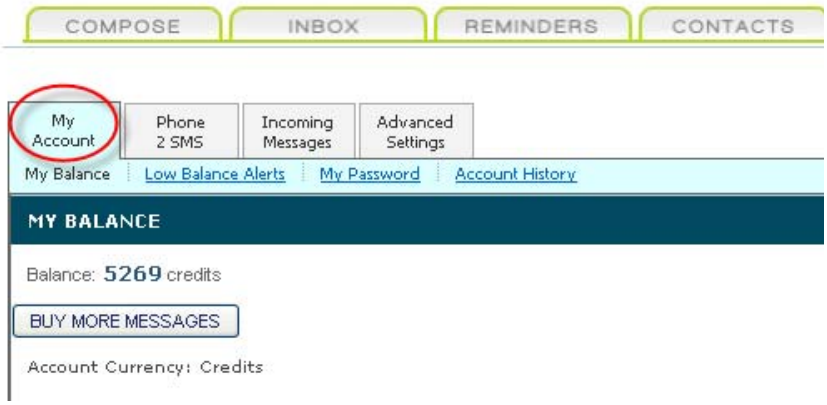
8.1 Buy Credit

You can purchase additional credits online using your credit card, or you can contact us directly and ask to be invoiced.

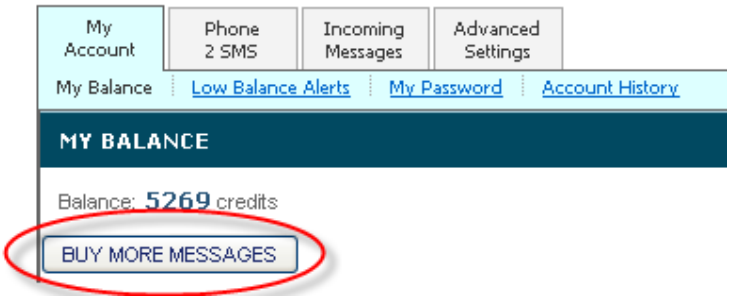
1. Once you have logged in to **Create*Text***.ie, click the **OPTIONS** tab.



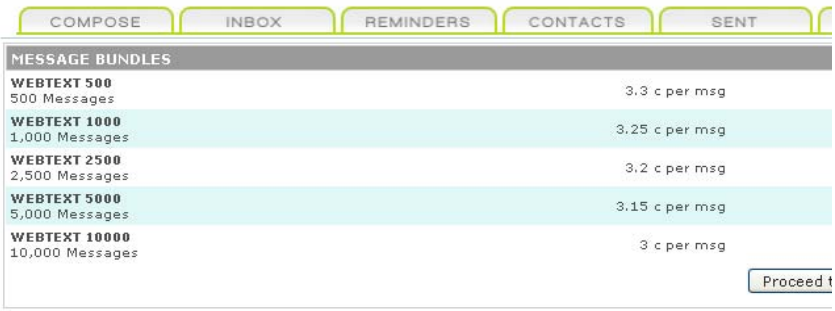
2. Choose **My Account** from the tabs that appear.



3. Click the **Buy More Messages** button.

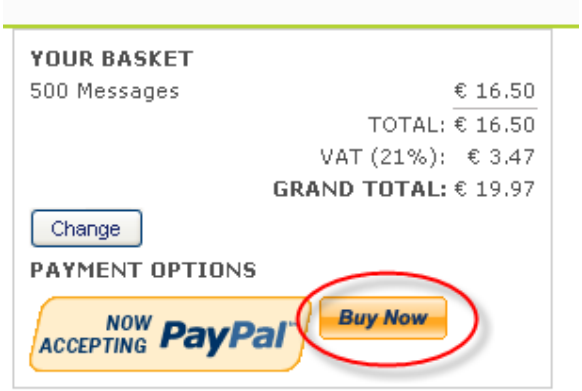


4. On the panel that appears, select the number of credits you want to buy.

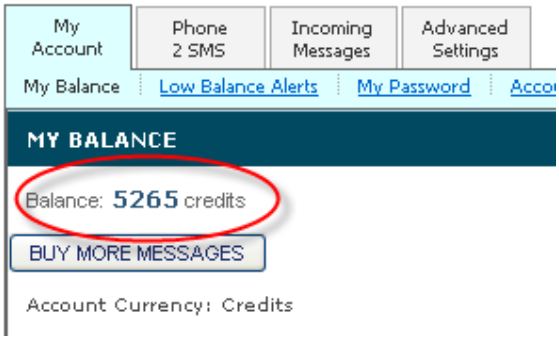


5. Click the **Proceed to checkout** button and continue to the shopping cart.

6. From the shopping cart, click the **Buy Now** button and add your credit card details to complete your payment.



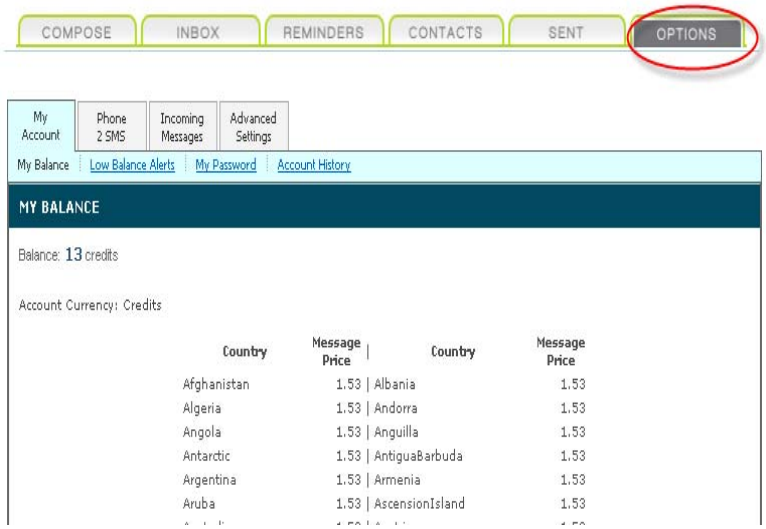
7. Your credit balance will be topped up immediately after you complete the transaction.



8.2 Set Low Balance Alert

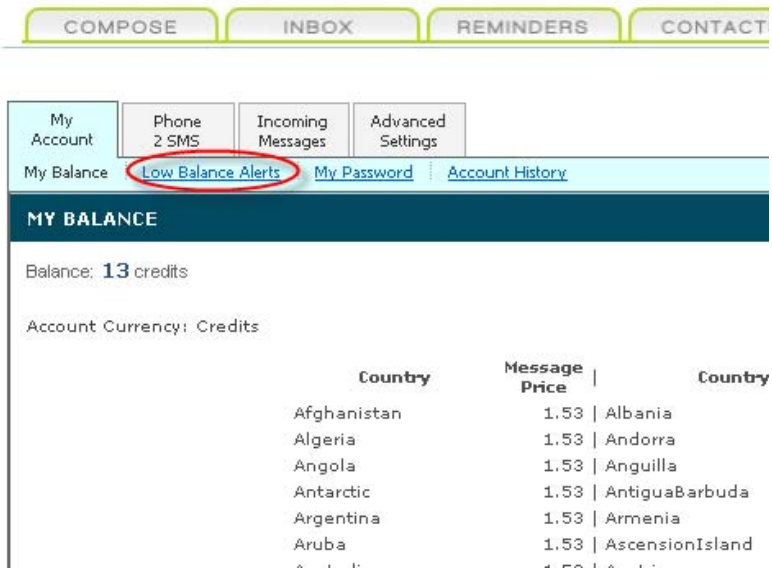
If you would like to be reminded when your credits are running low, you can set a low balance alert.

1. Once you have logged in to **Create*Text*.ie**, click the **OPTIONS** tab.

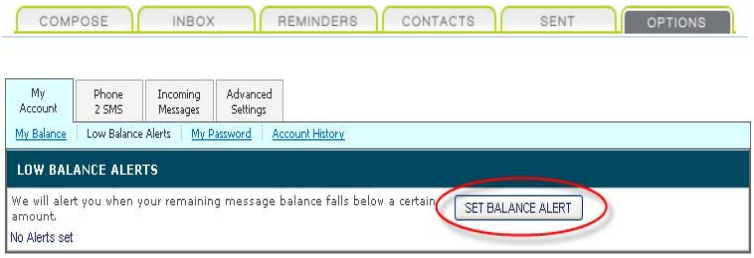


2. On the **OPTIONS** tab, click **My Account**.

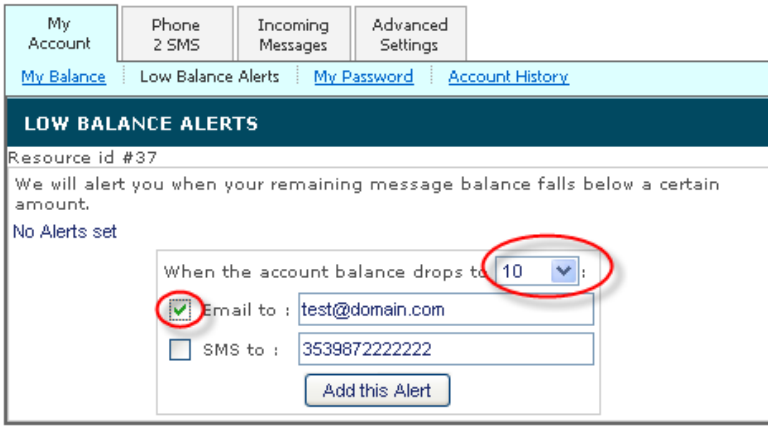
3. On the My Account tab, click **Low Balance Alerts.**



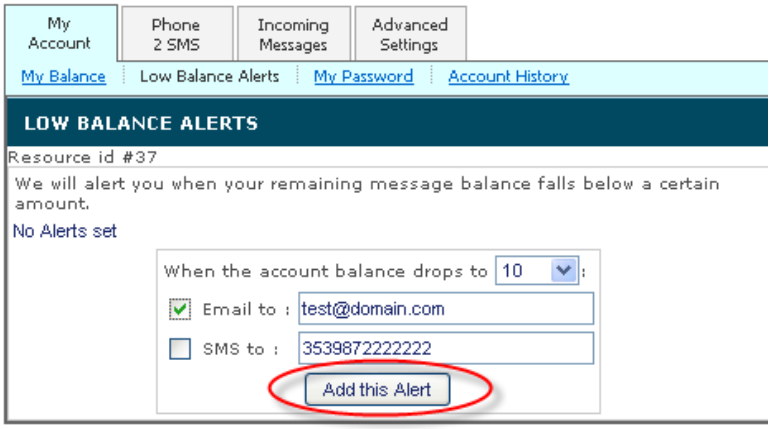
4. On the screen that appears, click the **SET BALANCE ALERT** button.



5. On the **LOW BALANCE ALERT PANEL**, set the credit level at which you would like to be reminded. Then choose to have an email reminder, a text reminder or both sent to you by ticking the relevant checkboxes. Here, you can also edit the email address or phone number the reminder is to be sent to.



6. Click the **Add this Alert** button.

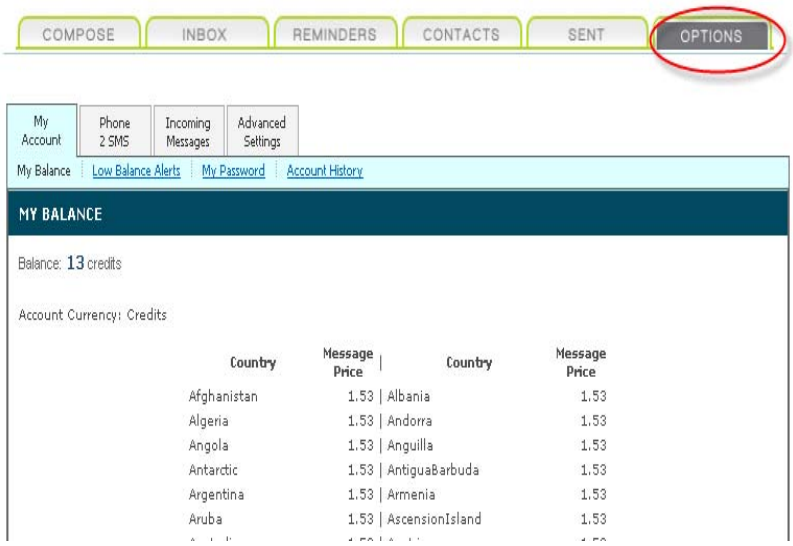


You have now set up your low balance alert. You will recieve an email and/or a text message once your credits have reached the level you selected.

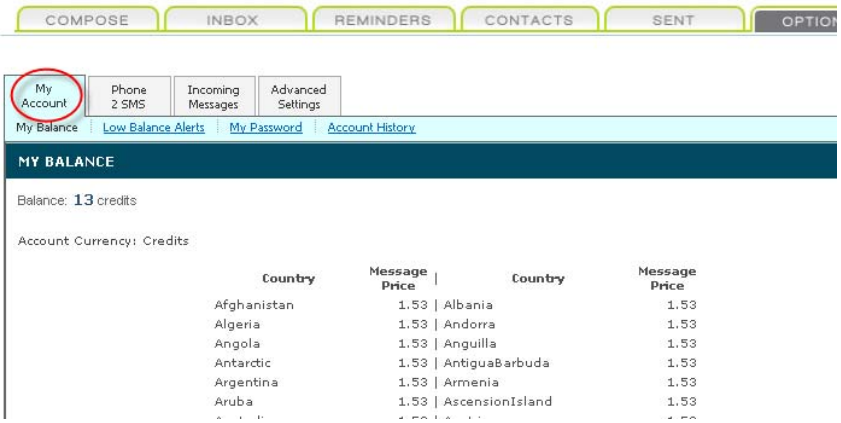
8.3 Change Your Password

It is good practice to change your password occasionally for security reasons. Make sure it is memorable – a combination of letters and numbers is always a good idea. You can change your password easily by taking the following steps:

1. Once you have logged in to **Create*Text***.ie, click the **OPTIONS** tab.

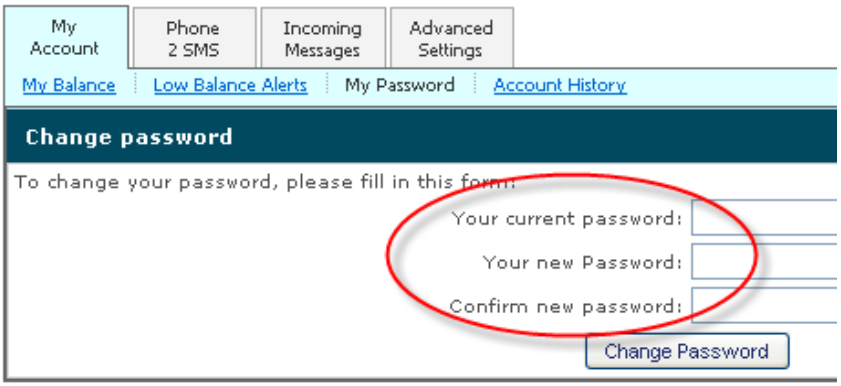


2. On the OPTIONS tab, click **My Account**.

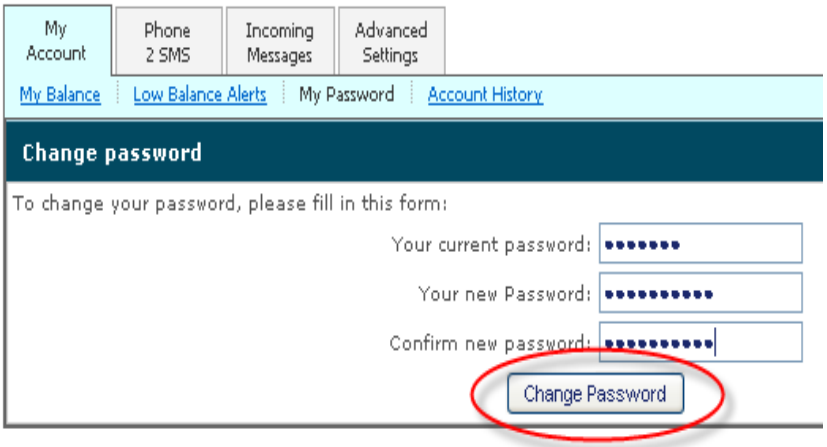


3. On the My Account tab, click **My Password.**

4. On the **MY PASSWORD** panel that appears, enter your current password and your new password. Confirm your new password by typing it in again.



5. Click the **Change Password** button.

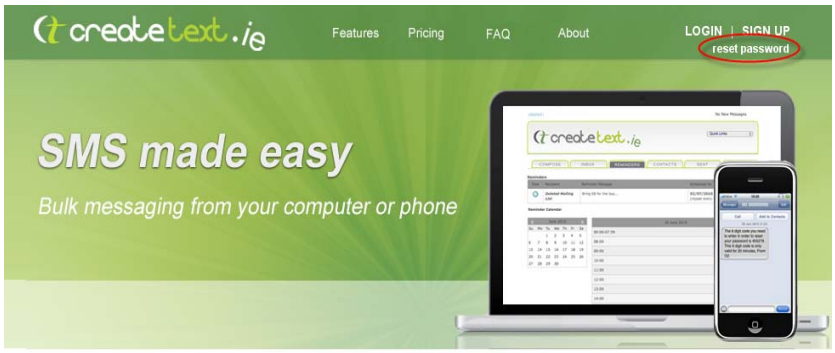


Your password has now been changed. Use your new password to access your **Create*Text***.ie account from now on.

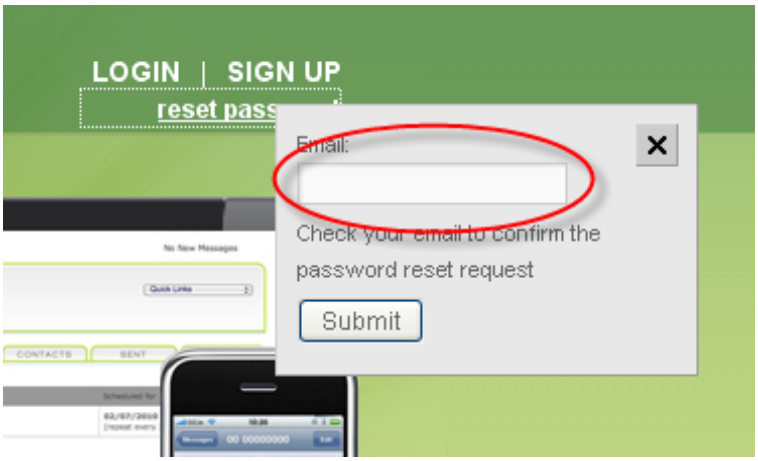
8.4 Reset Your Password

If you have forgotten your password, you can easily reset it from the CreatText.ie hompage.

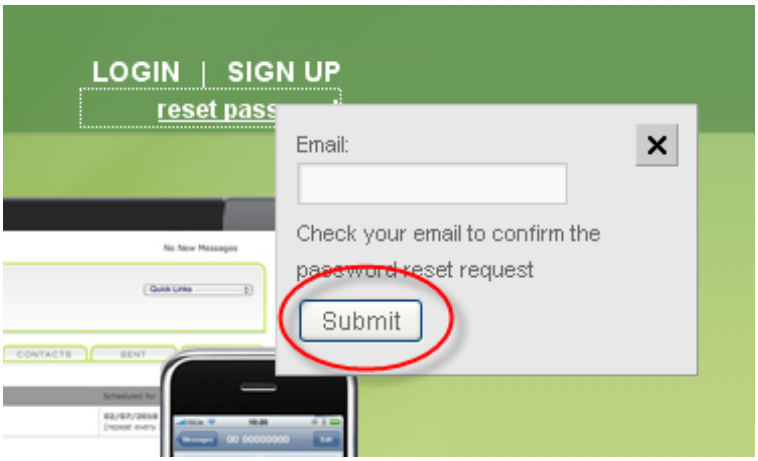
1. Once you are on the **Create*Text***.ie hompage, click the **Reset Password** link located to the right of the top navigation.



2. An pop box will appear with the option option to enter your email address.



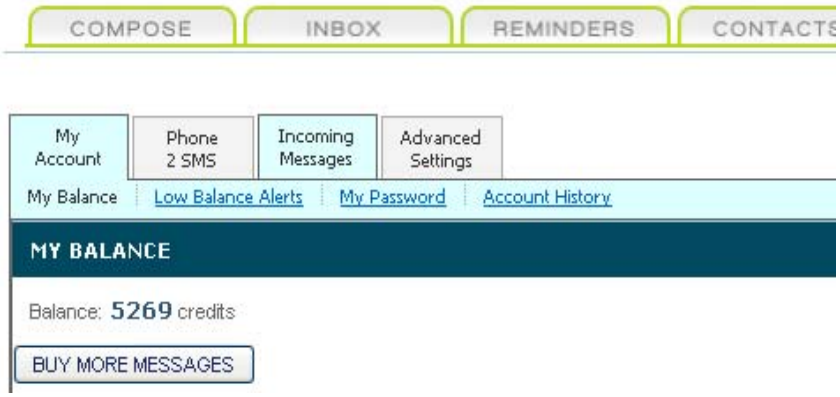
3 Click **Submit** to reset your existing password.



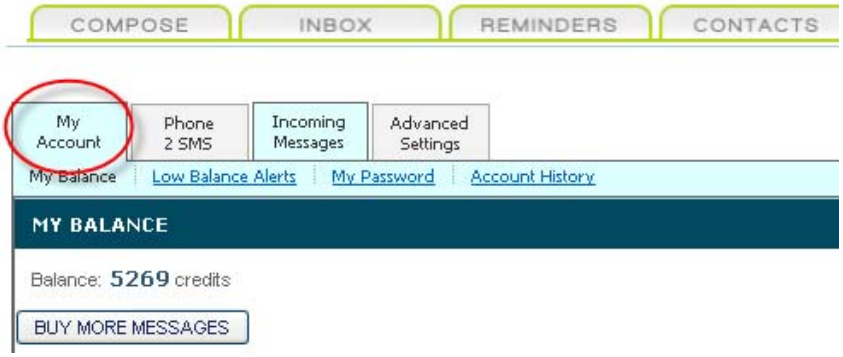
8.5 Credit Purchase History

Your purchase history is always available to you online at **Create*Text*.ie**. You can download this information easily and conveniently.

1. Once you have logged in to **Create*Text*.ie**, click the **OPTIONS** tab.



2. On the OPTIONS tab, click **My Account**.



This document as well as other support material is also available for download from: www.CreateText.ie/support