QUICK START GUIDE

createtext

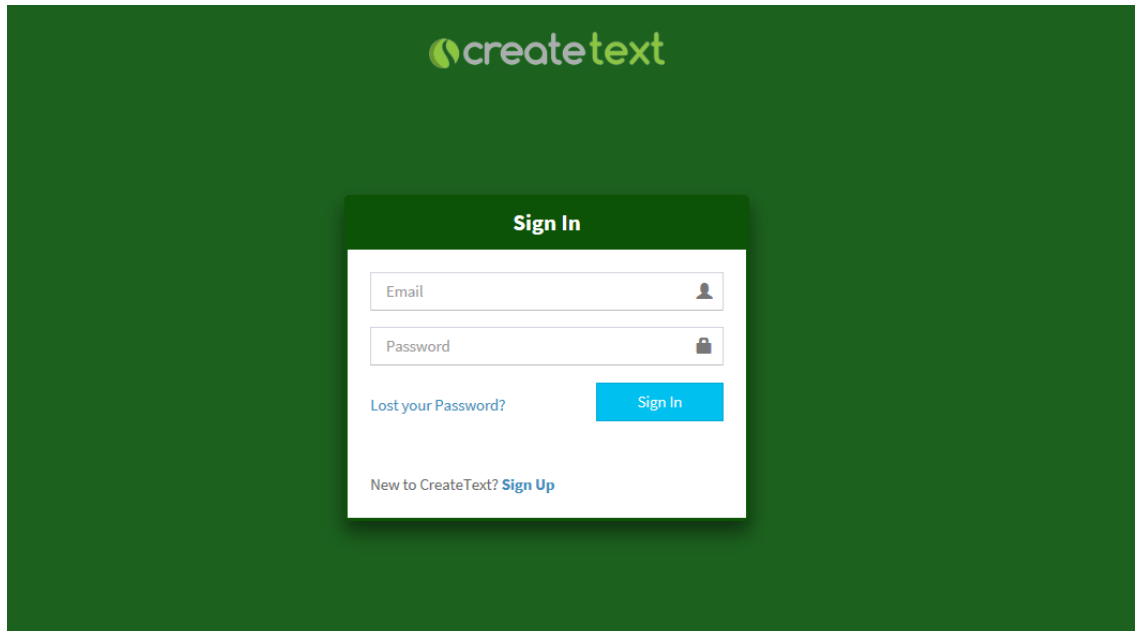SEPTEMBER 2018

1 Table of Contents

2 Log in to Your Account

1. Go to: https://account.createtext.net/

2. Type in your Email Address and Password and click "Sign In"

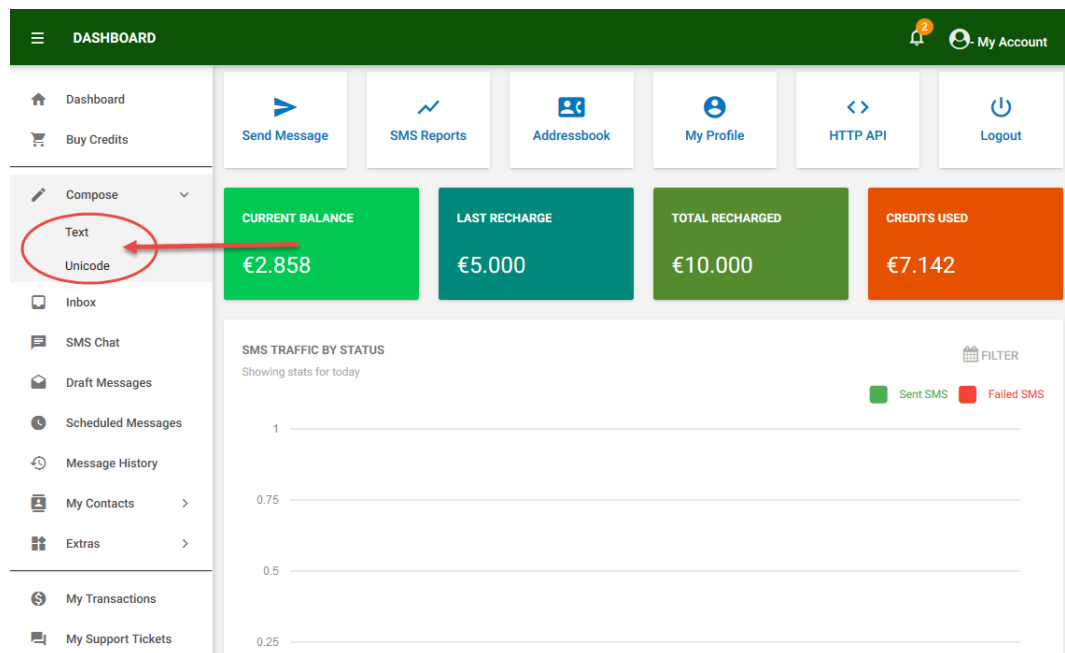3. After you have logged in you will be shown your account dashboard
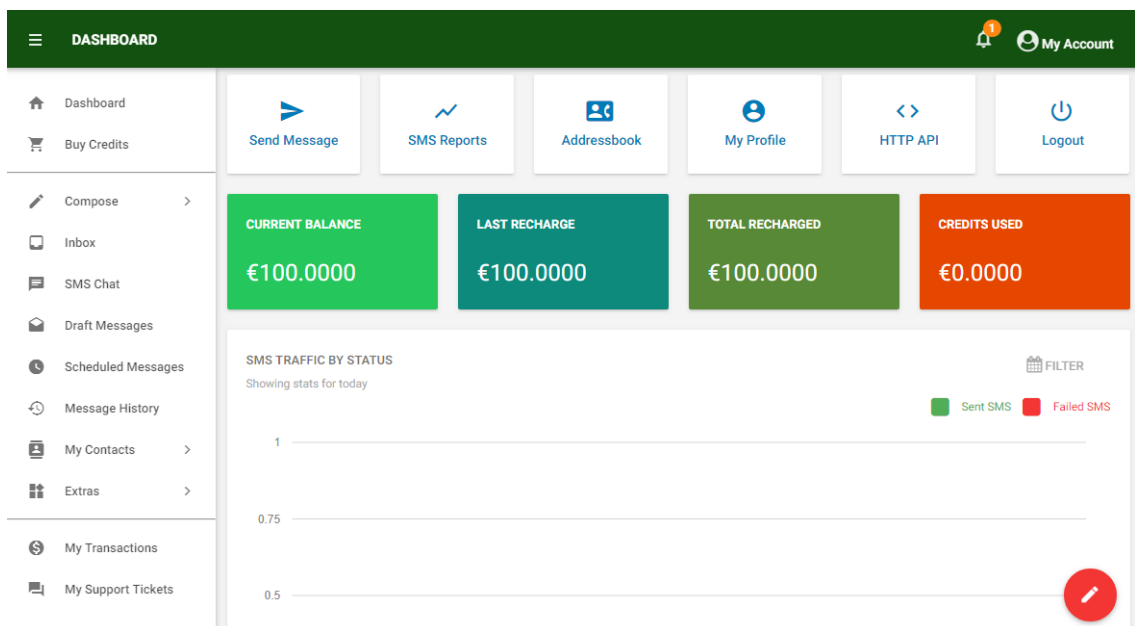
3 Send a One Way SMS Message

A One Way Message does not allow you to receive replies

1. Click Compose

    a. Choose "Text" - if the message content is in English and does not contain characters not found in the English language, eg é, û, í etc. To note, an SMS message sent as text will be at most 160 characters per SMS message.

    b. Choose "Unicode" – allows you to send an SMS in the language of your choice, using characters not found in the English language. E.g. é, û, í etc. To note, a Unicode message will be at most 70 characters per SMS message.

2. Compose your Message

3. Message Type: Ensure "Text Message" is displayed

4. Select Route: Ignore – this will remain as "Standard Routing Rule"

5. Sender ID: Select your Sender ID. This is what will display on a recipient phone as the sender of the incoming message

6. Or Use Shortcode: Ignore this field, it will not be used

7. Destination Country: Choose the relevant country. If sending to numbers in more than one country, select "Multiple Destinations".

8. Choose the Recipients – choose one of the following:

    a. Numbers: Type or paste in a list of mobile numbers. The numbers should be separated by commas. Type the numbers with the country code included, eg 353831111111.

    b. Addressbook: Click into the Addressbooks field and choose the Phonebook to which you want to send.

    c. Marketing List: Ignore.

    d. File: Upload an Excel or CSV file containing your list of mobile numbers

9. Message: Type in the Message Text

Recipient Sources

| NUMBERS | ADDRESSBOOK | MARKETING LIST | FILE |

Addressbooks
Pick Addressbooks

Message

0/960

10. Click into another field to update the message summary on the right side of the screen
11. Click the 'Send' Button

Schedule Message

Send Now ◯━ Send Later

CANCEL   SAVE   SEND

4 Send a Two Way SMS Message

Two Way Messages allow you to receive replies. Replies are stored in the Inbox of your CreateText account.

When a message recipient replies to your message it is very important that they include your specific reply keyword that was sent to you by email when your account was set up.

1. Click Compose

    a. Choose "Text" - if the message content is in English and does not contain characters not found in the English language, eg é, û, í etc. To note, an SMS message sent as text will be at most 160 characters per SMS message.

    b. Choose "Unicode" - allows you to send an SMS in the language of your choice, using characters not found in the English language. E.g. é, û, í etc. To note, a Unicode message will be at most 70 characters per SMS message.

2. Compose your Message

3. Message Type: Ensure "Text Message" is displayed

4. Select Route: Ignore – this will remain as "Standard Routing Rule"

5. Sender ID: Ignore the Sender ID field, it will not be used.

6. Click on 'Select Shortcode to use' and choose your Shortcode from the dropdown list

7. Destination Country: Choose the relevant country. If sending to numbers in more than one country, select "Multiple Destinations".

8. Choose the Recipients - choose one of the following:

    a. Numbers: Type or paste in a list of mobile numbers. The numbers should be separated by commas. Type the numbers with the country code included, eg 353831111111.

    b. AddressBook: Click into the Addressbooks field and choose the Phonebook to which you want to send.

    c. Marketing List: Ignore

    d. File: Upload and Excel or CSV file containing your list of mobile numbers

9. Message: Type in the Message Text

10. Click the 'Send' Button

5 Send a Message to Individual Numbers

1. Click My Contacts > My Address Book

2. Click "Manage" beside the Phonebook the numbers are in
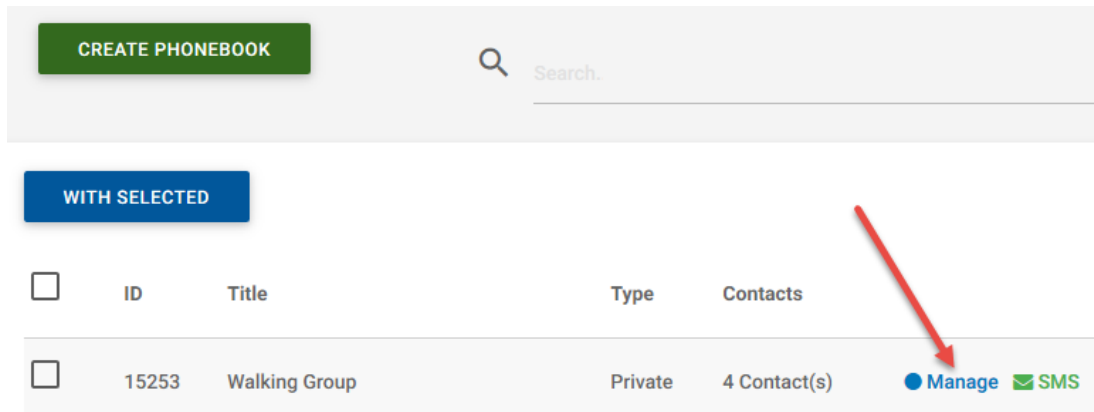
3. Tick the box to the left of the numbers the message is to be sent to
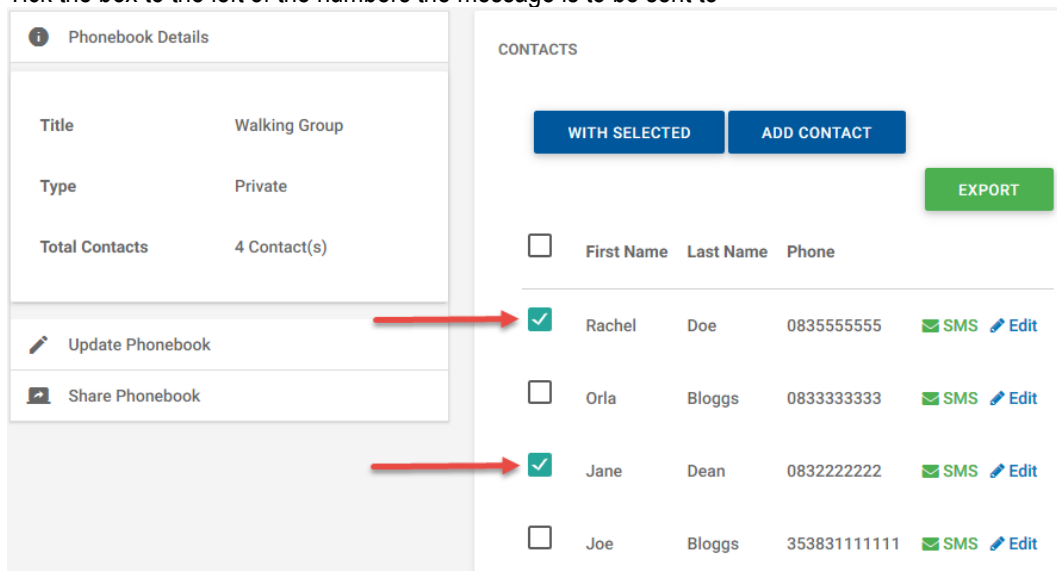
4. Click the blue "With Selected" box and choose "Message"
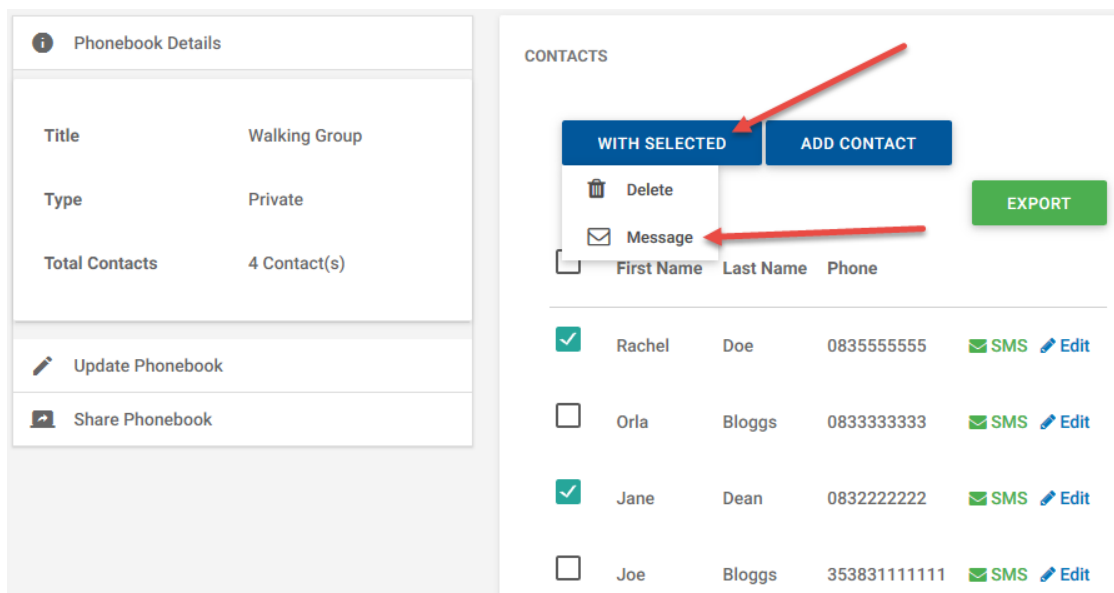
5. A message asking if you want to continue will appear, click "OK"

6. The Compose page will appear with the numbers already in the "Type Recipients" section

7. Compose your Message, as per sections 3 or 4 above.

    a. Note, ensure to only chose:

        i. "Sender ID" – if you do not want to receive a reply

            or

        ii. "Or Use Shortcode" - if you want to receive a reply

8. Click the green "Send" button when the message is ready to be sent.

6 Schedule an SMS Message

1. Click Compose > Text
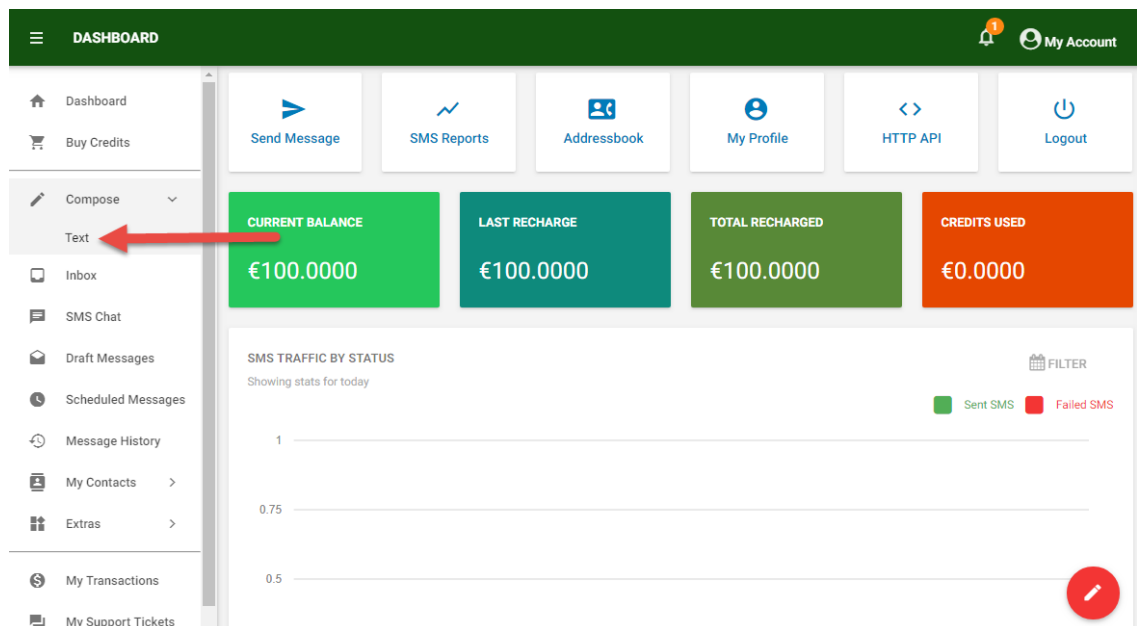
2. Compose your Message, as per sections 3 or 4 above
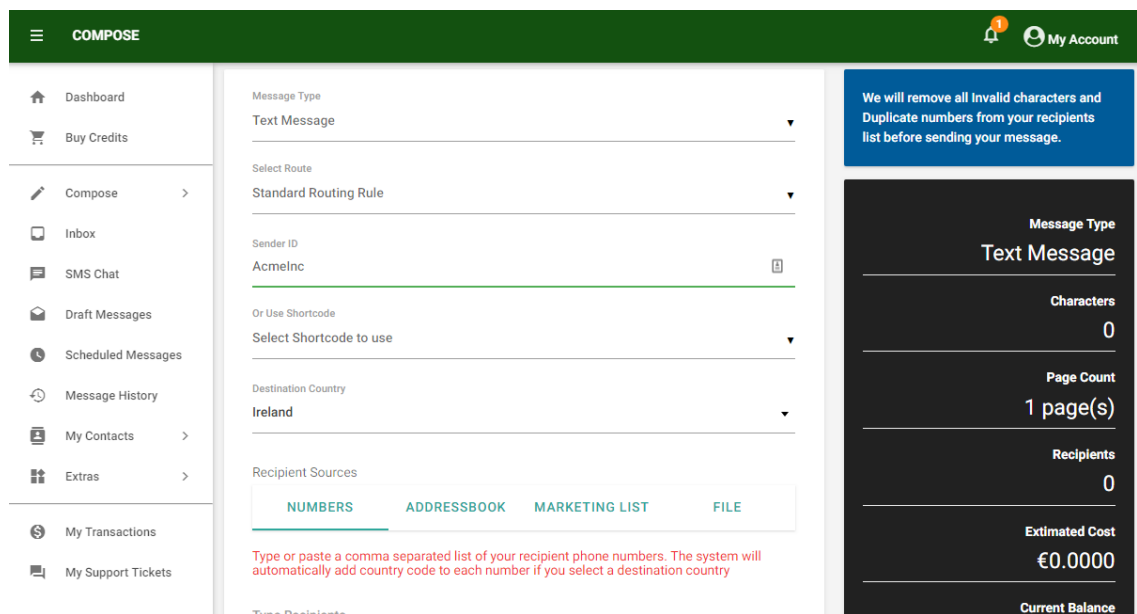
3. Click the 'Send Later' button

4. Choose the Scheduling options

1. Choose the Date and Time you want the message to send
2. Choose the Repeat Schedule, if any (Hourly, Weekly, monthly etc)

5. Click 'Send' and you will see a confirmation notice that your message has been scheduled

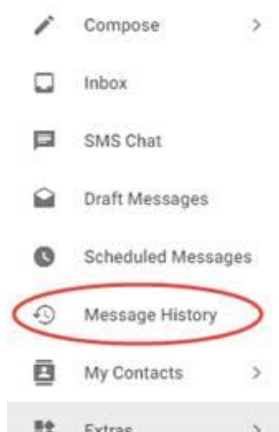6. Your message has been scheduled successfully. Go to Scheduled Message menu to manage your scheduled messages
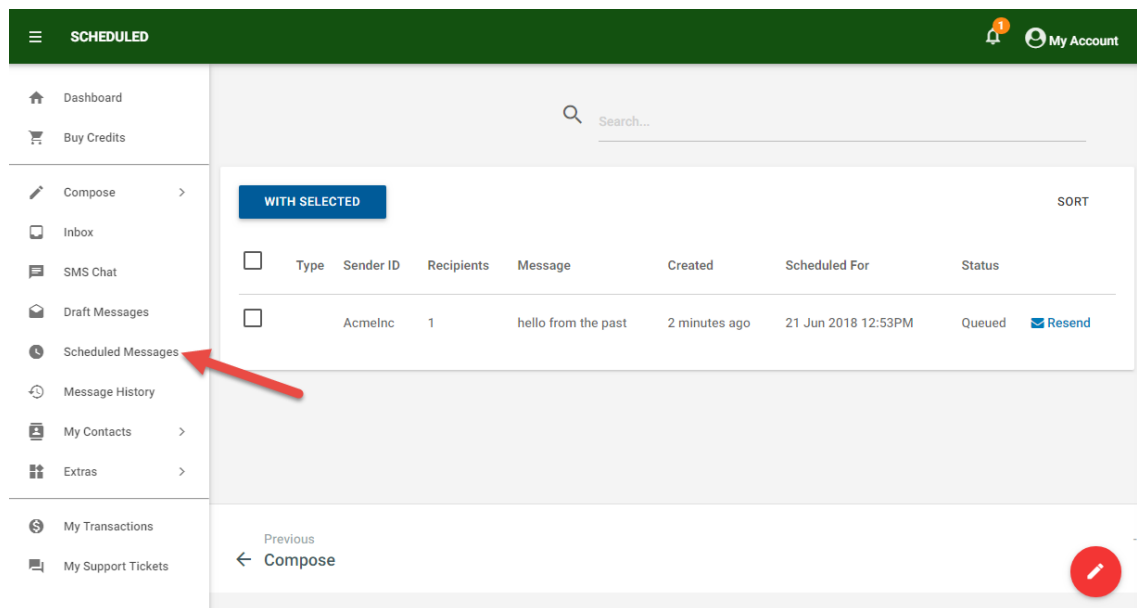
7. You can Delete, Cancel or Resend your scheduled messages from here.

7 View Sent Messages

To view all sent messages and see the message status:

1. In the left column of your account click "Message History"

2. You will see all previously sent message listed.

3. By default, all messages will show the status of "Completed"

4. To check the status of the message – click 'Details' to the right of the message
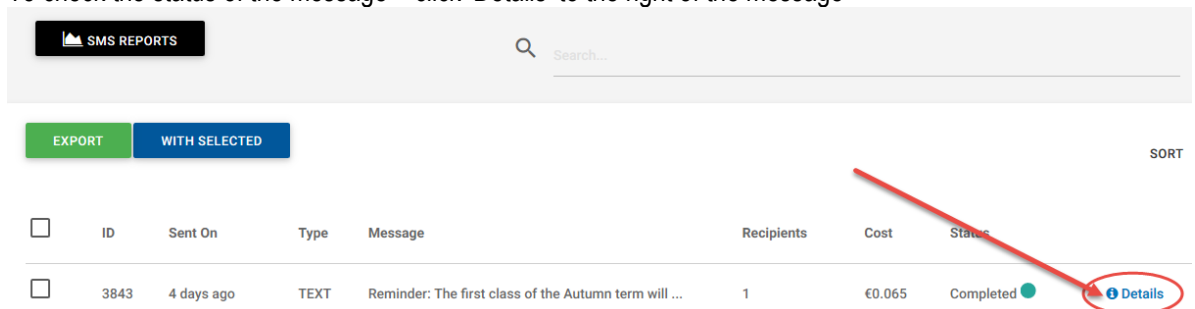
5. You will see listed the numbers the message was sent to and also the Status for each number
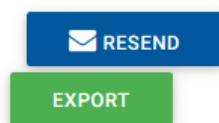
6. To export this information – click the green "Export" button

8 View Reply Messages

1. Click on Inbox

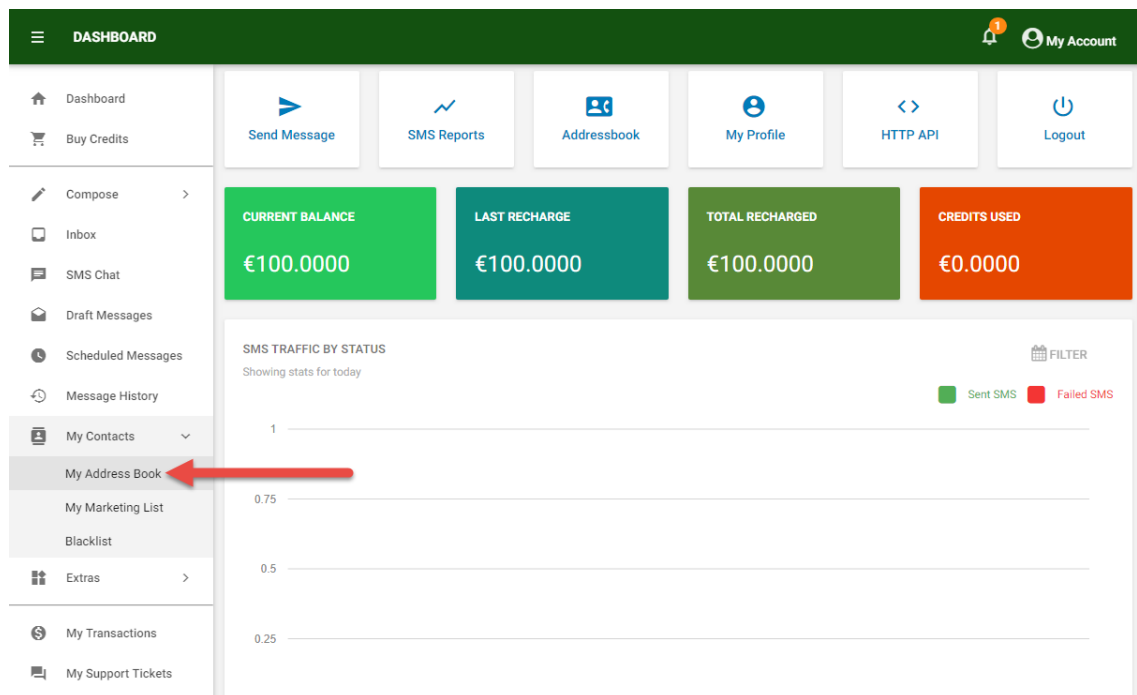2. From your Inbox you can View, Delete and Reply to messages

9 Add Contacts

Terminology: A Phonebook is a group. Individual contacts are stored in a Phonebook and all your Phonebooks are stored in your Address Book.
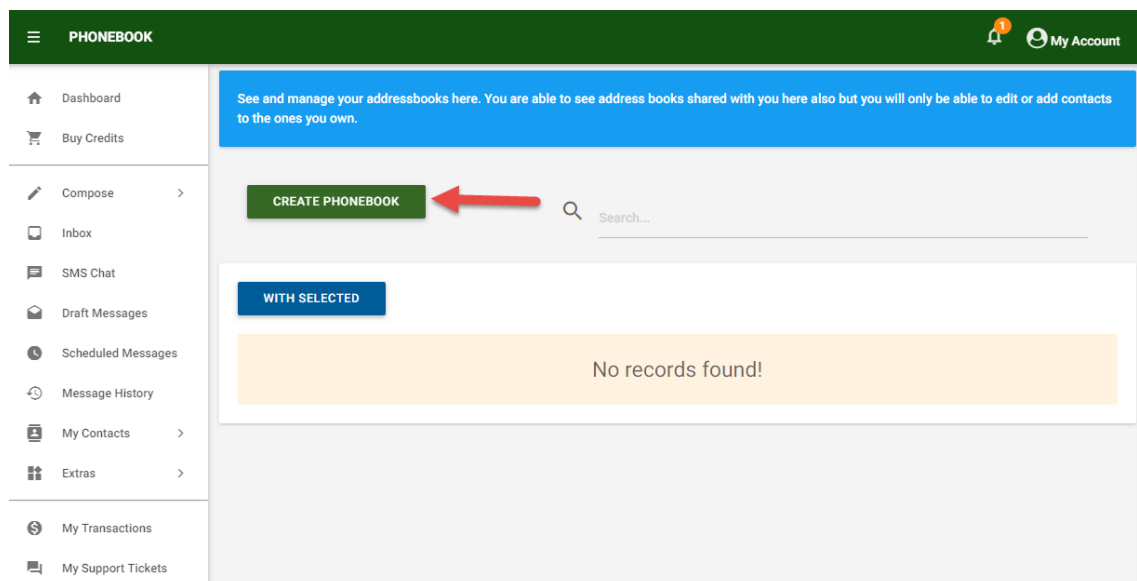
Important: Contact numbers are to be inputted in the International format, eg 353831234567.

Create the Phonebook:

1. Click on My Contacts > My Address Book

2. Click 'Create Phonebook'

3. Type a title for your Phonebook e.g.: Club Members and click 'Save'

4. Click 'Manage'

5. Click 'Add Contact'

To add a Single Contact:
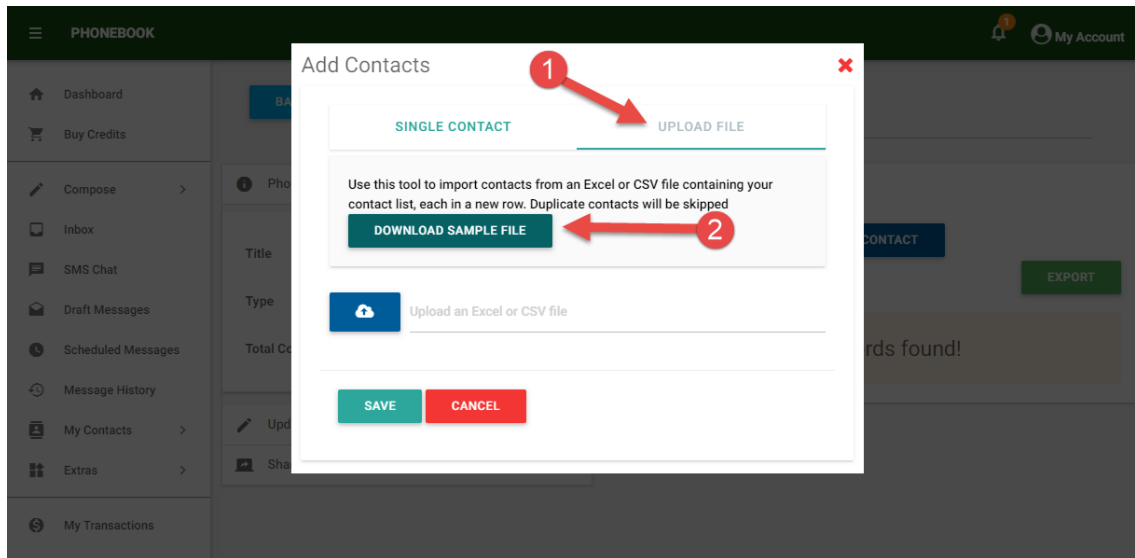
6. Click 'Single Contact'
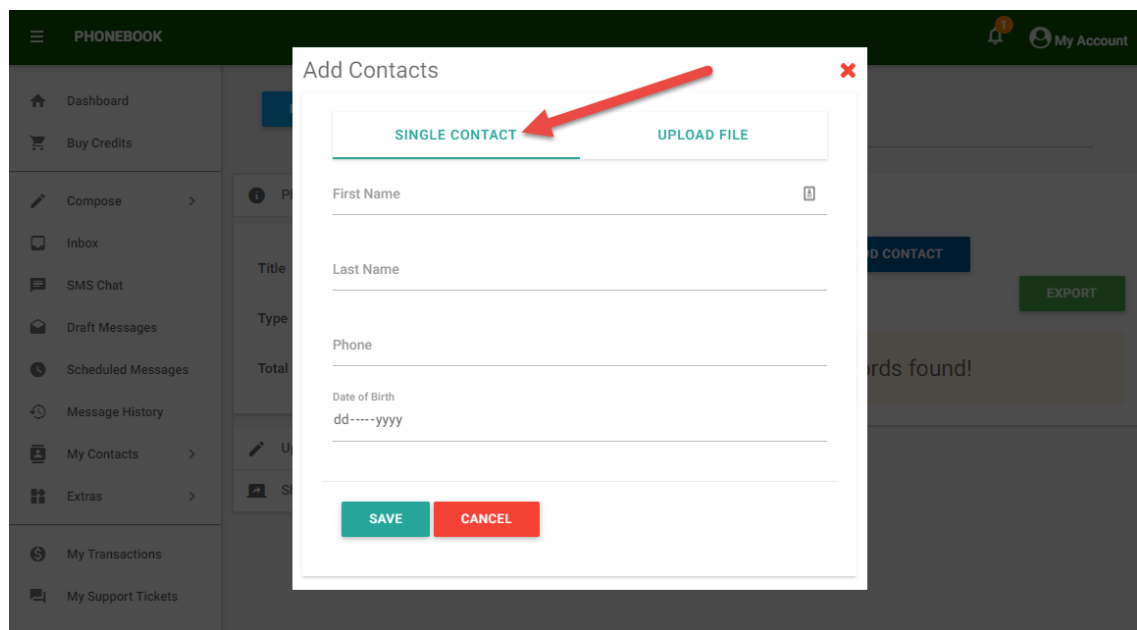
7. Type in the First Name, Last Name and Phone. The mobile number to be in the International Format, eg 353831234567.

8. Click 'Save'. The contact has now been added to your PhoneBook.
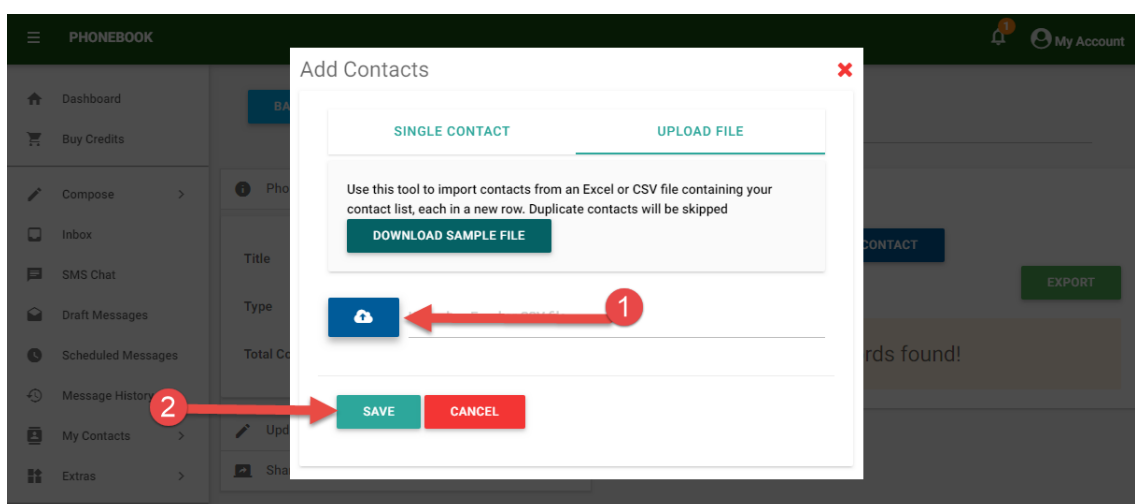
To upload a contact file:

9. Click 'Upload file' and then 'Download Sample File'

10. Replace the Sample contact details on the file with your contact information and save it to your pc

  a. The Order of columns AND the column Titles are important

    i.   Phone Number

    ii. First Name

    iii. Last Name

    iv. (you do not need to include Date of birth)

11. Click the button to upload your contact information file and click 'Save'
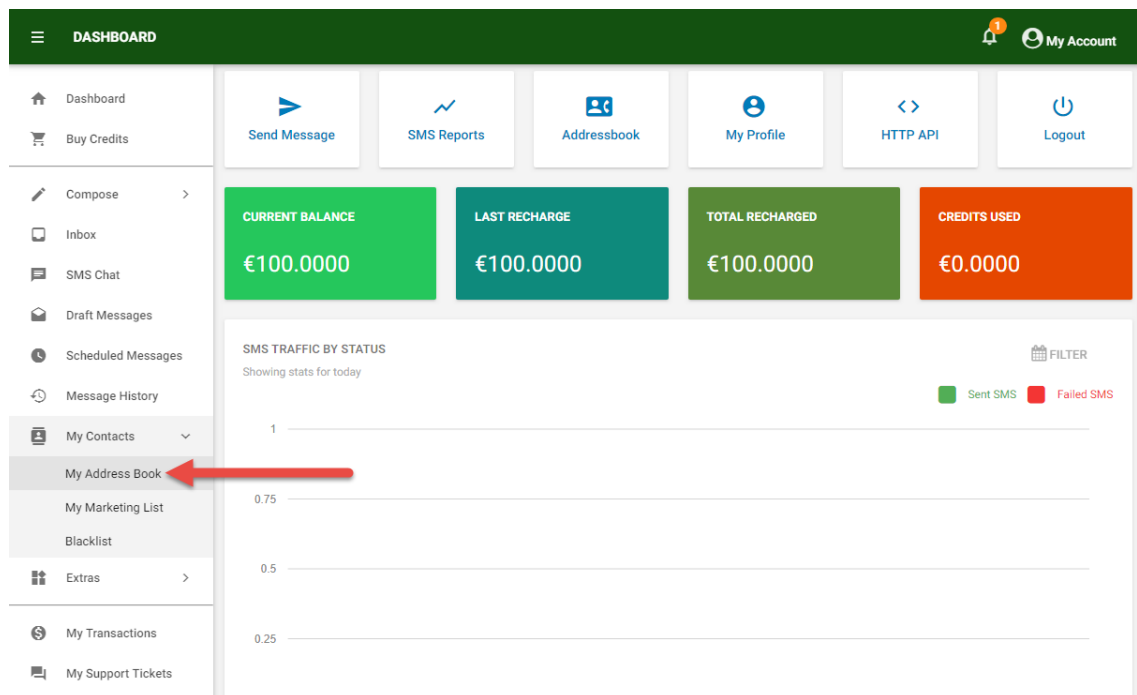
12. The contacts have now been added to your PhoneBook

10 Delete Contacts

1. Click on My Contacts > My Address Book

2. Click the 'Manage' beside the name of the PhoneBook the contact is to be deleted from

3. In the Phonebook - if the name or number is not visible, in Search Contacts enter the First Name or Number of the contact and click Enter on your keyboard
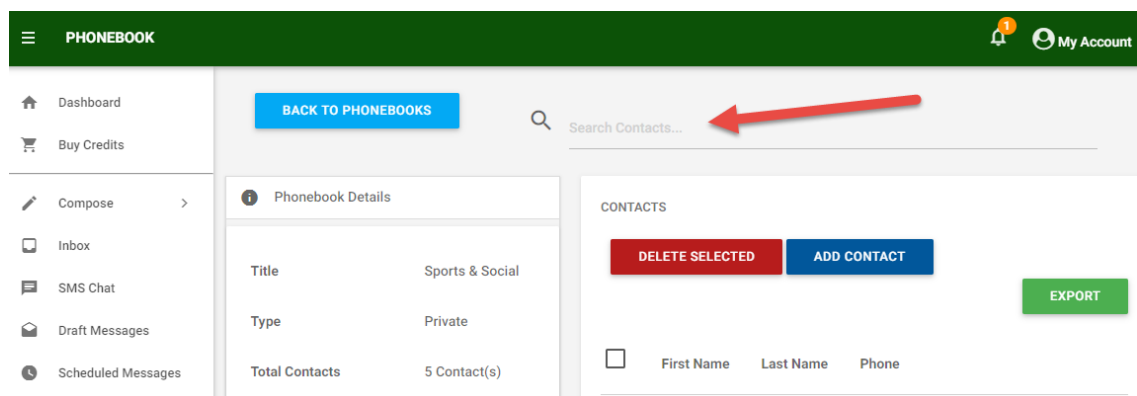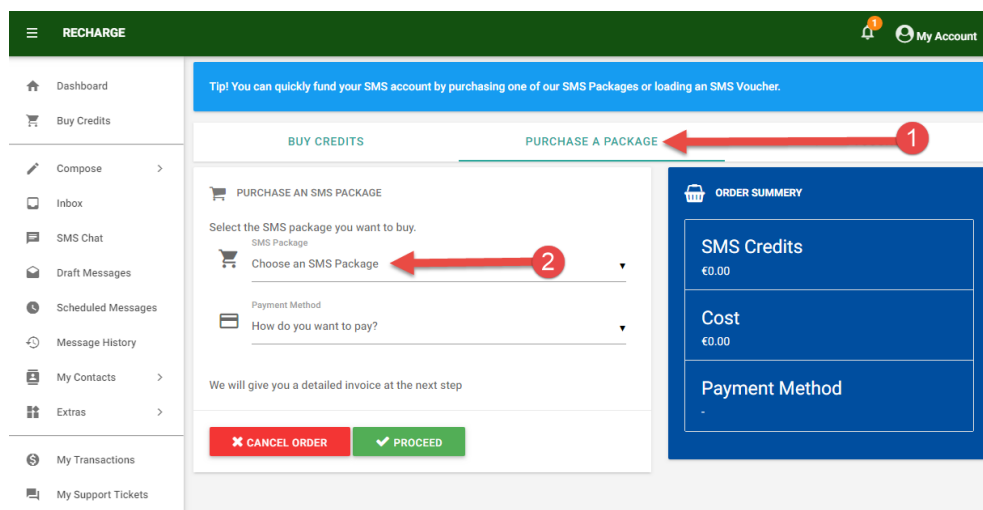

4. Tick the box to the left of the name and click the blue 'With Selected' button

5. Choose 'Delete'

6. You will be asked to confirm you want to delete the item. Click OK.

7. You will see a confirmation notice that the contact has been deleted from this Phonebook

8. If the contact is in any other Phonebooks, and you want to delete the contact fully from your account, you will need to repeat the above steps to remove the contact from other Phonebooks they are in.
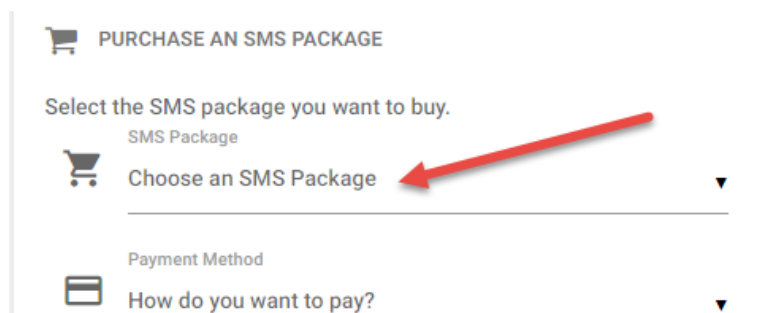
11 Buy Credits

1. Click Buy Credits
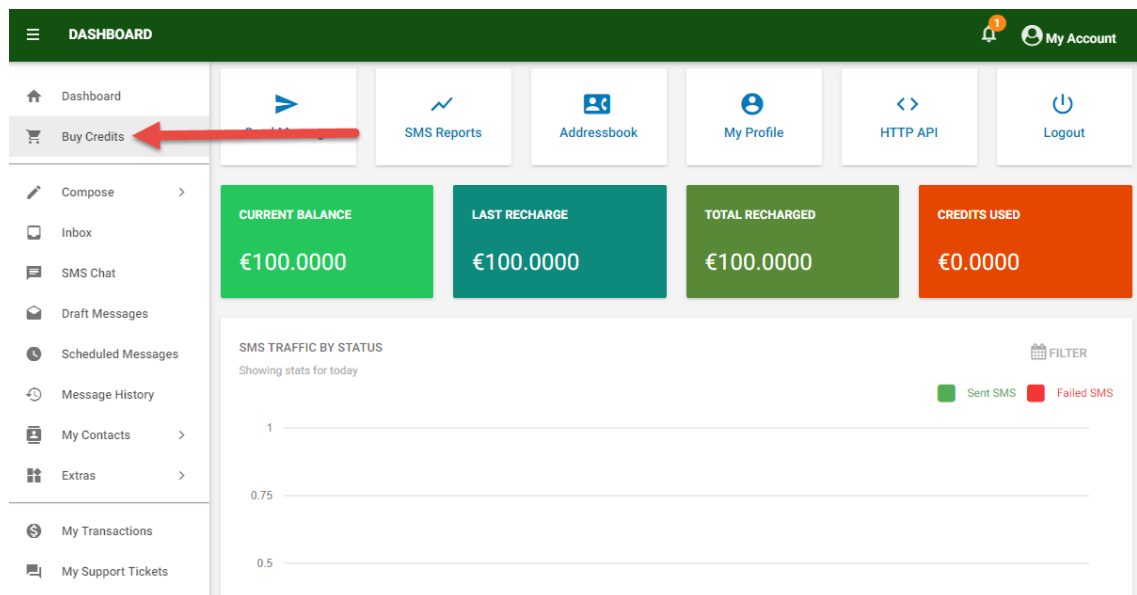
2. Click the option 'Purchase a Package'

3. Choose the SMS Package you want to buy

4. Choose the Payment Method and click 'Proceed'

5. Complete your purchase via our secure payment gateway.

6. Upon successful completion of the payment the monetary amount will be added to your account and you will receive an email notification to confirm.
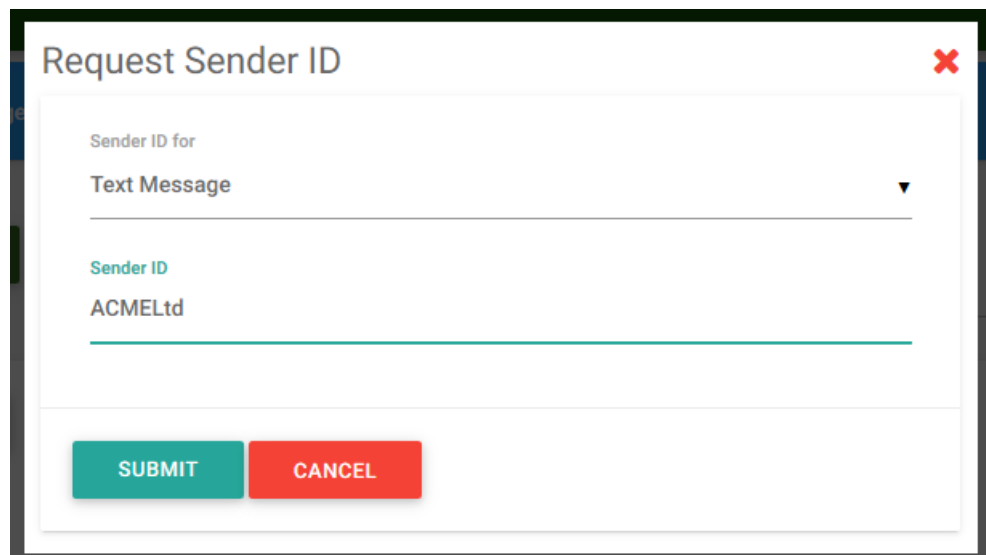
12 How to Set Up Your Sender ID

The Sender ID is what will display on a recipient phone as the sender of the incoming message.

- To note: if a message is sent using a Sender ID, the recipient will NOT be able to reply. Please see Section 4, Page 6 in relation to receiving replies.

By default the Sender ID is CreateText. If you want to change the default Sender ID for your account:

7. In the left column of your account click "Extras"

8. Choose "Sender ID" from the dropdown menu

9. Click the green "ADD SENDER ID" button

   a. Sender ID for – choose "Text Message"

   b. Sender ID – type in the Sender ID you want to use.

   c. Note, the Sender ID is max. 11 characters, numbers and letters, with no funny characters or spaces.


10. Your request will be submitted to our Support Team who will send an email once your request has been processed

11. You can set up as many Sender ID's as necessary. Simply follow the above steps for each one needed.
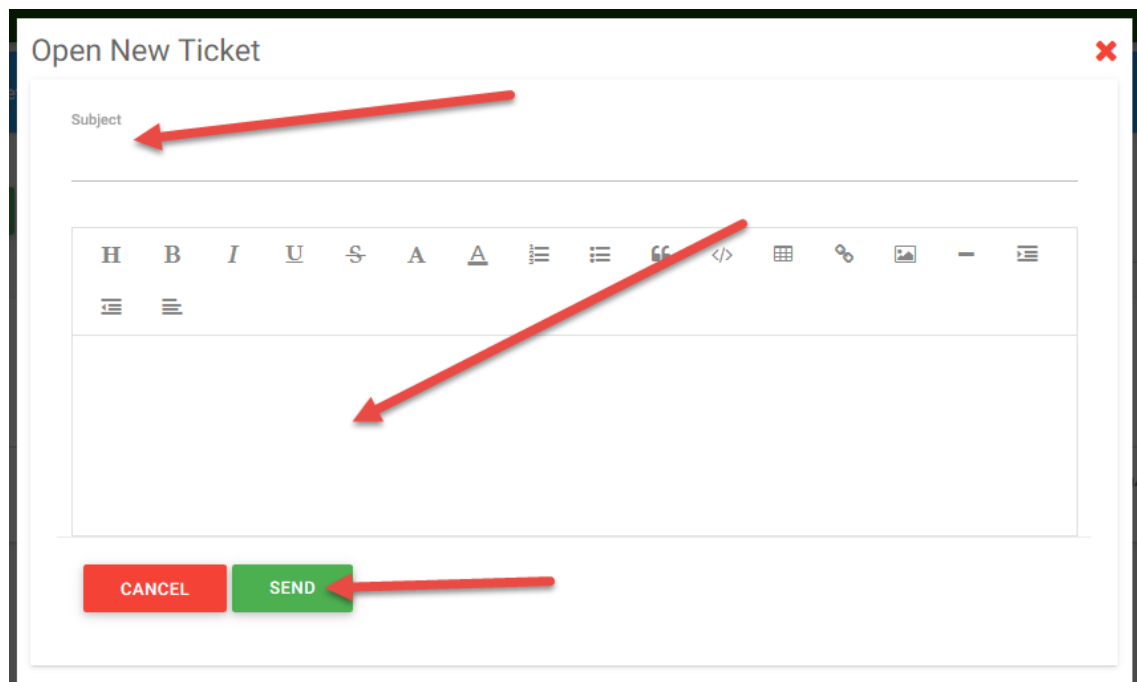
13 How to Contact Us

If you have any questions or queries in relation to your account - you can submit a query through your account.

1. In the left column of your account click "My Support Tickets"
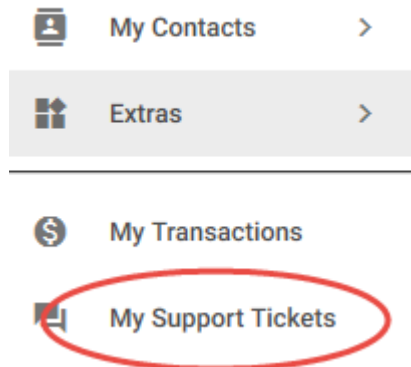
2. Click the green 'NEW TICKET" BUTTON
3. Type in the Subject of your query
4. Type the content of your query in the message box
5. Click 'Send'

6. Your query will be submitted to our Support Team who will get in contact with you as soon as possible.

THANK
YOU

createtext