



# **User Manual**

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## **Introduction...**

Welcome to the txttools service :)

This is the document for our txttools application, aimed at schools, colleges and universities.

It is our vision to create world class communication and mobile learning tools to empower and connect everyone wherever they are on the planet.

As a leader in desktop to mobile communications we aim to provide the highest quality service to all our customers. We always appreciate your feedback and comments.

## **What can txttools do for you?**

txttools will enable you to efficiently send, receive and manage SMS text messages from any internet connected PC to and from any mobile phone on the planet. SMS messaging is a rapidly evolving communication medium, convenient, cost effective and efficient – txttools can help keep you at the forefront of this technology.



## **Support and The txttools Community**

As a txttools account holder you are a member of one of the fastest growing SMS communities in Europe! As such, there are numerous ways you can get support and advice both from our dedicated Support Team and other members of the community.

### **txttools Support**

Olivier and his colleagues in our dedicated Support Team are available from 8am to 5pm every weekday, via phone, email and Live Chat should you ever require any assistance with the application. If you have a query, encounter a problem, or perhaps have a suggestion to make, please feel free to contact us. Full contact details can be found at the back of this document.

### **txttools Blog**

The blog is viewable on the Home page after logging in and provides the latest news and important support announcements.

### **Let's Talk About Txt!**

Since March 2007 we have held a FREE conference roughly every six months for customers to showcase the way they use txttools and for you to meet with fellow users and discuss all things txt-related. See [www.txttools.co.uk](http://www.txttools.co.uk) for upcoming dates and venues.

### **Got Skype?**

You can contact the Support Team via the instant message facility on Skype. Add us to your contact list (our username is txttools\_support) and you will be able to chat to us instantly during our office hours.

### **Live Help!**

To chat with the Support Team live, simply click the 'Live Help' icon at the top of your account page. This will open up a chat window with an available team member who will be able to give you instant help and advice.



## Logging In

Signing into your account is simple and secure. You should have received a username and password via email, if you have not, please contact the Support Team.

Your initial password is randomly generated, we strongly recommend changing it as soon as possible to something memorable. The password you choose needs to be at least 8 characters long, can only contain numbers and letters and is case sensitive.

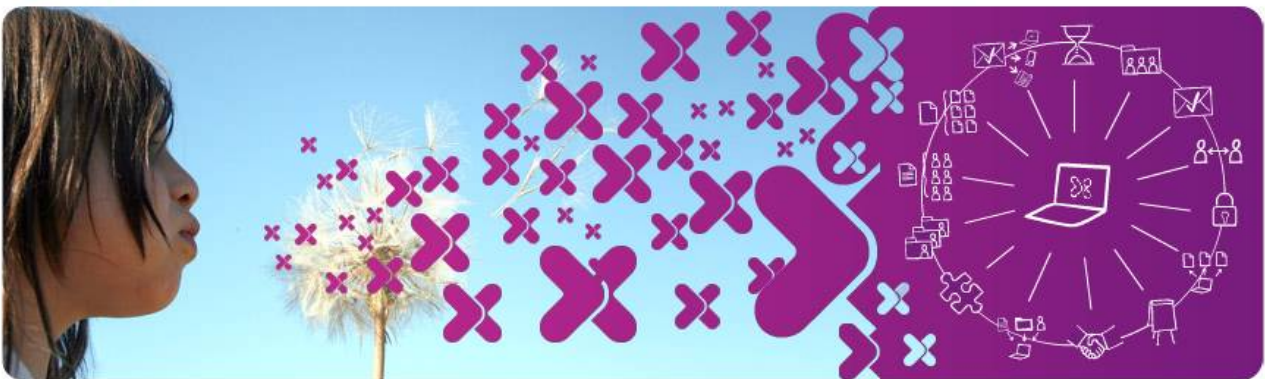
You should not disclose your username or password to anybody. We will NEVER ask for your password. If you believe the security of your account has been compromised, you should change your password straight away to prevent unauthorised use of your account.

To log in to your account navigate to [www.txttools.co.uk](http://www.txttools.co.uk) in your web browser and type your username and password into the boxes on the top right of the screen.



customer login

username	<input type="text"/>
password	<input type="password"/>
	<input type="button" value="login"/>





## Security Question

The first time you log in you will be asked to provide a security question and answer. Like your password, you should not divulge the answer to your security question to anyone.

Select a security question from the drop-down list provided and type your answer into the field. Your answer will be stored on our system for future reference (in case we need to verify your answer for a password reset, for example).

You will only have to provide the security question once; after logging in the first time, it will take you directly to the home page of your account as shown below:

The screenshot shows the txttools user interface. At the top, there is a header with the 'simple.clever.' logo and the txttools logo. Below the header, there is an 'Inbox summary' showing 'New: 392 Read: 48 Replied: 1' and a 'Logged in as: admin | Logout' link. A navigation bar contains icons for Home, Inbox, Outbox, Sent, Compose, Addressbook, Groups, Services, Templates, Account, and Live Help!. The main content area is divided into three columns. The left column is titled 'Instant Text Message' and contains fields for 'Phone Number:', 'Search for Contacts:' (with a 'Type contact's name...' input), 'Templates:' (with a 'Select a template' dropdown), a 'Message:' text area, and a 'Send' button. Below the message area, it shows 'Number of characters: 0', 'Messages per recipient: 0', 'Message credits used: 0', and 'Characters per message: 160'. The middle column is titled 'txttools limited » application news' and contains a 'Middleware v1.3 released' announcement with a 'Click here to read the full posting' link. The right column is titled 'Conferences' and contains a 'Download Presentations' link. At the bottom of the page, there is a footer with '© Copyright txttools Ltd. 2001-2010' and links for 'Terms and Conditions', 'Your Privacy', 'Contact us', and 'Training Evaluation'.



## Navigating txttools



The image above shows the main menu bar. These buttons are used to navigate around the txttools site (It is a good idea to use these buttons as opposed to your browser's 'Back', 'Forward' and 'Refresh' buttons, as these can resend information, duplicating contacts and messages).

Some pages have a sub-menu displayed at the top of the page. This menu will usually contain links to the various things you can do in this section, like adding contacts, groups or templates.

On pages where data is displayed, you can sort and arrange the data on screen by clicking on the column headers.

If you make any errors while using the system (trying to send a message in the past, for example), the application will come up with a red error message indicating where the error is and what needs to be changed.

Check boxes next to contacts, groups, messages or templates can be used for batch operations, such as deletion.

The Logout button is in the top-right corner of your screen.





## Home

### Instant Text Message

This feature will allow you to send a message to a individual(s) without necessarily having to add the contact into the address book. You can either type the recipient's telephone number in the Phone Number field, or you can use the search box to search for a contact within your address book (just start typing their name or unique ID).

To send to more than one individual, simply add the required recipient numbers separated by commas (if you are using the search box, it will automatically separate it for you).

Then you may either choose a template or type a message in the Message box. You can also add your signature onto the end of the message (creating and editing signatures and templates can be found on pages 22 – 23).

A screenshot of a web form titled "Instant Text Message". The form has a light gray background and a white border. It contains several input fields and a dropdown menu. At the top, there is a "Phone Number:" label followed by a white text input field. Below that is a "Search for Contacts:" label followed by a white text input field containing the placeholder text "Type contact's name...". Underneath is a "Templates:" label followed by a dropdown menu with the text "Select a template" and a small downward arrow. The next section is "Message:" followed by a large yellow text area with a small cursor icon in the bottom right corner. Below the message area, there are four lines of status information: "Number of characters: 0", "Messages per recipient: 0", "Message credits used: 0", and "Characters per message: 160". At the bottom, there is a "Message Signature:" label followed by a checkbox and the text "( bittools)". Finally, there is a "Send" button at the very bottom.

As you are creating the message, the application will keep you updated on the number of characters in your message: 160 characters is the maximum for a single text message – any



more and it will be sent out as separate messages (except for Unicode messages – see p.28 for details). You will also be able to see how many message credits in total will be used by the message.

Once you are satisfied, just click on Send and your message will be sent out.

You are able to send the message to international phone numbers as well. There is no additional cost to send the message to an international number, it is just a single message credit as usual. All you would need to ensure is that the correct country code is appended onto the phone number.

## **Blog**

In the centre of the homepage is the txttools blog. This provides the latest news on txttools, including any updates or support/technical announcements. If you have any queries about any of our news feeds, please feel free to contact us.

## **Conference Presentations**

On the right hand side of the page, you will find a link entitled 'Download Presentations'. This will take you through to a page with links to download various presentations regarding txttools, some by our staff members, some by members of institutions who use our system. This is a great resource if you are looking for ideas on how the software can be used and how other institutions are using the system.

## **Manuals and Other Links**

There is a link entitled 'Click here for Manuals, FAQs and User Guides' which will bring up the complete list of manuals for the whole site, including information not covered in this guide.

There is now a New Features link which will show the specific updates made in our previous release. These details can also be found on our Blog.

You can also register for our monthly newsletter, which contains articles, updates, integration and any other news within the company.

## **Account Settings**

There are several options available to you from the account page:



- **View and edit your user profile**
- **Manage your message credits**
- **Change your password**

**If you are an administrator, see our separate “Administrator's Guide” for additional functions available to you on this page.**

## **Your Profile**

**Clicking on the 'Profile' button in the menu bar from the account page will display your personal account details. Your name and email address should be filled in by default. If you wish, you can enter phone and address details, although this is entirely optional.**

**The email address and phone number you enter will be used for any forward to email or mobile actions set up on your account. See the separate Inbox Rules guide for a full run down of forwarding options.**

**(Please note that any personal data you enter will only be used for us to contact you regarding your txttools account – we will NEVER pass your details on to third parties.)**

**You can set (and should keep up to date) your local timezone as this will be used by the system to ensure messages are sent at the correct local time.**

**Finally you have the option to set and/or modify your secret question and answer. You should ensure this is something memorable. We reserve the right to ask you your secret question to verify your identity in the event that you require us to make any modifications to your account, or forget your password.**

**Clicking the 'Submit' button at the foot of the page will save your changes and return you to the account page.**

## **Changing the Home Page**

**You can change the Home Page to any page of txttools. This allows you to set what page you see when you log in to your account.**



To choose your required page, select the drop down menu titled Home Page, and select which page you would like to see when you log in.

## **Viewing Your Message Credits**

Invoiced/Prepay customers will be able to click 'Messages' from the account page to see a summary of message credits they have remaining, in addition to a summary of messages used/remaining for all sub users.

We will apply the Invoiced/Prepay option at the time of setting up your account.

Invoiced customers will be able to view how many messages have been sent and how many messages are remaining.

Prepay customers can use this screen to allocate or revoke message credits to and from sub users. Select Allocate or Revoke from the drop-down list at the foot of the page, type in the required number of credits and select the sub user from the list provided. Clicking 'Submit' will then confirm the changes.

## **Message Credit Alerts**

An email alert can be sent to warn when there are few message credits remaining. The number inserted will indicate the threshold at which the alert is sent. Clicking 'Submit' will then confirm the alert.

## **Changing Your Password**

You should change your password regularly in order to help keep your account secure. You can change your password from the Account screen by clicking the 'Change User Password'



**button:**

**Change password**

New Password

Confirm Password

**Administrators can also change the passwords of their sub users. More information regarding this can be found in our Administrator's Guide.**

## **Address Book**

**The address book is where all your contacts are stored. Prior to sending a**



message from the Compose page, the recipient must be stored in your address book.

From the address book screen you can add new contacts (either manually or by batch upload); view, modify or delete existing contacts. Reports of contact information stored within your address book can be extracted if required.

You can sort the address book alphabetically or numerically by clicking on the column header. The number of records viewed on a single page can be modified by selecting one of the 'Lines per Page' options at the top of the screen.

## **Parent/Student Contacts (edutxt accounts only)**

Edutxt permits you the ability to store contact details for your pupils/students, and also their parents or carers. This provides you the flexibility to contact your pupils regarding events or reminders, but also the ability to reach their parents quickly and easily regarding absences or school trips.

## **Adding New Contacts**

There are many ways to add new contacts to your txttools address book.



## Manually Create a Contact

Click the 'New Contact' button at the top of the page to view the screen below:

The screenshot shows a web interface for creating or modifying a contact. At the top, there is a header bar with the title 'Create/Modify Contact' and four navigation buttons: 'List contacts', 'Search', 'New contact', and 'Upload'. Below the header is a form titled 'Contact'. The form has a 'Save' button at the top left. It contains several input fields: 'Firstname \*', 'Surname \*', 'Mobile Phone Number', 'E-mail', 'Unique ID', 'Notes', 'Gender' (with a '-select-' dropdown), 'DOB', 'House number', 'Address1', 'Address2', 'City', 'County', 'Country' (with a '-select-' dropdown), and 'Post Code'. Below the contact form is a section titled 'Groups' which contains two entries, each with a checkbox and a date: 'Multiple Recipients - Mar 16 2010 03:36' and 'Multiple Recipients - May 24 2010 08:50'. A 'Normal' button is also visible. At the bottom of the form, there is another 'Save' button.

Fill in the fields as required, select any groups you wish to add the new contact to, and then click the 'Save' button. The new contact will be added to your address book. Note that first name and last name are required fields. A unique ID (e.g. student number) is strongly recommended as this will be used to differentiate any contact with the same name.

The email field can be useful as when filled in, the application will allow you to send out a free email to the recipient at the same time as you send a text message (see the Compose section p.27 for more details). The Notes field can be used to merge additional information into the message.

You can also add the Gender/DOB/Address details. These details are not compulsory but may be needed to use the 'custom groups' feature.

## Spreadsheet Upload

Export your contacts from your existing MIS system, save the file in CSV, Excel or XML



format and follow the on-screen instructions from the 'Upload' button.

For a detailed guide to uploading your contacts, navigate to the Manuals page or contact Support to obtain a copy of our Upload Guide.

## XML/SOAP Messaging/Address Book Integration

Create a virtual link between your existing MIS system and txttools using our XML connector. This will more than likely require the input of your IT department and our Technical Team – but once completed will automatically export contacts from your system directly into your address book at regular intervals defined by you. Please navigate to our Developers page (<https://www.txttools.co.uk/preloginjsp/txttools/developers.jsp>) or contact Support for a copy of the XML/SOAP API documentation.

## Middleware Application

txttools Address Book Middleware is a small Java application which takes contact and group data from a simple database and uploads it to txttools via the SOAP API. This requires much less coding knowledge than the above method. Please contact Support for a copy of the Middleware application software user guide.

## Modifying and Deleting Contacts

To **modify** a contact's details, click on their name in the address book. The create/modify contact screen will be displayed where you can edit any information you wish, including group membership. Clicking on 'Save' at the bottom will then save your changes.

To **delete** a contact, from the main address book screen check the box to the left of the contact's name and then click 'Delete Selected Contacts' at the foot of the page. You can select as many contacts as you wish to delete on a single page.

## Conversations







The application now has the ability to show conversation history, i.e. all the incoming and outgoing messages between you and a contact. This can be accessed by clicking on the speech bubble sign on the left of the relevant contact. Further information can be found on page 38 of this guide.

## Creating a Report

You can create a report of the information displayed on screen at any time. The buttons displayed below will export the information on screen to the appropriate format:

Create a Report of the above as  CSV |  Excel |  XML |  PDF

You will see these options on every page throughout the application.

You can save the created file to your computer for your records, or print it for filing purposes.

## Groups



After your contacts are added to the address book, you can place your contacts into groups to make sending messages to large numbers of contacts quick and easy. You can create an unlimited number of groups, and any individual contact can be in as many of these groups as required.

If you include groups in your CSV upload they will be created automatically for you.

Groups are listed on the page with a description (if set) and the number of members. As with the address book, you can sort the list alphabetically or numerically by clicking on the column headers.

You have three main options on this screen, creating new groups manually, creating a 'custom group' or combining existing groups to create 'super-groups'.

## Creating a new Group

To create a new group select the 'New group' button at the top of the screen.

Enter a name for your group (required) and a description if you wish (optional, but particularly useful if more than one group shares a similar name – e.g. if you use module or course codes for group names).

Add members to the new group by highlighting their name in the 'Potential Group Members' box and clicking the 'Add -->' button to move them to the 'Current Group Members' box. Upon clicking Add, all the contacts in this box will be added to the group. You can select multiple contacts at the same time by holding down the CTRL key whilst clicking on them, or select a range by selecting the first contact, holding SHIFT, then selecting the last contact in the range you wish to add.



## Creating a Custom/Dynamic group

A custom group matches a subsection of the contacts in your address book to a set of criteria. To create a custom group, select 'New custom group' from the top of the page.

Like a normal group, you need a name and a can have a description. However instead of selecting specific contacts to join the group, you have to add criteria that contacts have to match. If you have no filters then all contacts will be selected. Here is an example of criteria you can select:

A screenshot of a web-based 'Criteria' form. The form has a title 'Criteria' at the top left. Below the title is a button labeled 'Add filter' with a downward arrow. There are four filter rows, each starting with a minus sign in a box. The first row is 'Phone number is' followed by a dropdown menu showing 'UK number'. The second row is 'is' followed by 'born', 'on/after', a dropdown showing '15', a dropdown showing 'Jan', and a dropdown showing '1990'. The third row is 'is' followed by 'a member of' and a dropdown menu showing 'Normal'. The fourth row is 'Female' with a dropdown arrow. At the bottom of the form are two checkboxes: 'Create group now' and 'Save criteria'. A 'Save' button is located at the very bottom of the form.

Here, the matching contacts will be female \*Students/Staff\* with a UK number (i.e. +447.../07.../00447...) who were born on/after 15th Jan 1990 and are members of the group 'Normal'. edutxt parent contacts are not picked up by this method.

One important note: **\*Contacts MUST have Gender/DOB information in order to use the associated filters\***. This may seem obvious, but is often overlooked.

## Creating a Custom/Dynamic group continued...



The two check boxes at the bottom give you two options:

Create group now    Save criteria

'Create group now' collects all the contacts matching the criteria and creates a new group full of those contacts.

'Save criteria' creates a new group – but instead of having contacts, it holds the criteria. This 'dynamic group' only then populates with contacts at message send time. This can be very useful, especially when your address book is constantly changing, or when your filters contain data that may change, such as age.

**NB: A dynamic group ALWAYS has 0 contacts except at message send time.**

## Examples of dynamic group usage

1. Say a school wants to schedule a message for the new year to wish all your contacts a happy new year. The only problem is that your address book changes frequently. To ensure all contacts get the message, a custom group called 'Everyone' with no criteria can be created (thus selecting all contacts) and the message can then be scheduled to this group. This way, it doesn't matter what changes are made to the address book as all contacts are included at send time.
2. Say you have a dynamic group called 'Birthday' that has the criteria 'birthday – is today'. If you set up a service that sends messages to the group 'Birthday' at 9am every morning, then only contacts whose birthday it is at the time of sending will get the message on each day.
3. Dynamic groups can also search between ages. This means that you can send a message to contacts of a certain age range to inform them, for example, of relevant course options for their educational stage.

## Combine Groups

To combine groups to make a super group, select 'Combine Groups' from the top of the page. A screen will be displayed very similar to the 'Create Group' page, only this time instead of selecting individuals to populate the group you select the existing groups you



would like to combine to create the super-group. At any point you can return to the list of groups by selecting the 'List Groups' button.

## Existing Group

To modify an existing group, click on its name in the list of groups. You will be taken to the original creation page where you can make modifications to the group as required.

## Deleting a Group

To delete a group, check the box next to its name in the list of groups and then click the 'Delete Selected Groups' button at the bottom of the page.

**NB:** Deleting a group will not delete the contacts from your address book, just the group association between them.

## Viewing Group Member Details

You can view (and create reports of) a succinct view of all the members of a particular group if required. To do this, click on the group name in the list of groups to go to the 'Create/Modify' screen. At this point you should see the 'Member Details' button in the menu at the top of the page – clicking on this will provide you with a summary of the members of that group.

## Searching Groups

You can search for a specific group in your list by using the search function at the top right hand corner of the Groups page. Simply enter the name of the group you want to find into the box, and click 'search'.

You can return to the list of groups by selecting 'List Groups' from the menu at the top of the screen.

## Templates

Templates can save you time when creating messages that you send regularly. Once a template has been created, it is saved to your account and can be recalled on the Compose (or Instant Text Message) screen at the touch of a button.



**Templates and Signature**

List templates | **New template** | Edit signature

---

**Templates**

**Template text**

- Hi %%FIRSTNAME Welcome to txttools!
- Hi %%FIRSTNAME, this is going to be used as a template.

Select: none | all | invert | Delete Selected Templates

Create a Report of the above as CSV | Excel | XML | PDF

---

**Signature**

From Sam xx

## Creating a New Template

To create a new template, select 'New Template' from the menu at the top of the screen. Type your desired template into the text field that appears – the counters at the top of the screen tell you how many characters (and individual messages) are used by your message.

**Template Content**

Number of characters: 0      Number of messages: 0      Characters per message: 160

Insert into message:

You can insert merge-tags for the recipient's firstname, lastname or fullname, which when the message is sent out will be replaced by the individual's name from your address book.

Clicking the 'Save Template' button will return you to the main screen above and add your template to the list of saved templates at the top of the screen.

## Modifying and Deleting Templates

To modify a template, click upon it in the list of saved templates. You will be returned to the create/modify screen where you can make any changes that you wish.



To delete a template, check the box next to it in the list of saved templates and then click the 'Delete Templates' button.

## Creating/Editing a Signature

You can append a signature to the end of your messages in much the same way you can to an email. To set up a signature, from the templates page select 'Edit Signature' from the menu bar. You can then type in whatever you would like the signature to say; when you are satisfied just click on 'Change Signature' and it will be saved onto your account. Once a signature has been created, you can edit it by clicking directly on your signature as displayed at the foot of the templates page.

A screenshot of a web interface for editing a message signature. At the top, it says 'Message Signature'. Below that, there are three statistics: 'Number of characters: 0', 'Number of messages: 0', and 'Characters per message: 160'. A large, empty yellow text box is provided for entering the signature. At the bottom, there are two buttons: 'Change Signature' and 'Reset'.

A signature can be appended to the end of any message you send out by selecting the appropriate option from the Compose page. Signatures have no maximum length, but are added to the total character length of a message in addition to your message content.

## Compose

The majority of messages you send out from the application will be created on the compose page. This is likely to be where you spend most of your time within the application.

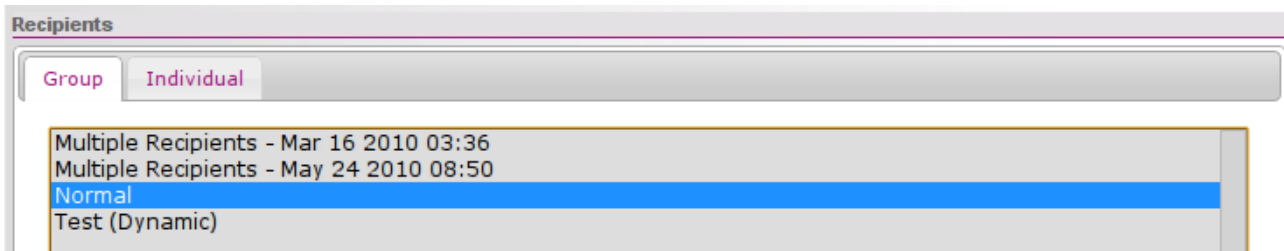


There are three main parts to a text message, and thus appropriately the compose page is split into three sections:

- Recipients
- Message Content
- Date and time to send

## Selecting Recipients

All the groups within your address book are, by default, displayed in a list at the top of the screen. To send your message to a group, click on its name in the list so it is highlighted blue.



You can also send the message out to an individual or a selection of individuals instead. If you select the 'Individual' tab, you will see a 'Search for Contacts' box. Simply start to type the required recipient in that box (name or unique ID) and the application will filter out the relevant contacts from your address book. The more you type, the more specific the search becomes. When you see the required recipient, just click on them and they will appear in the 'Message Recipients' box below.

You can then repeat this process to add as many people as required to receive the message.





**Recipients**

Group Individual

Search for Contacts:  
Type the contact's name or unique ID here...

Message Recipients (1):  
Test, Test (ph: +447000000000)

Remove selected contacts from message

**Note that if you select multiple people from the 'Individual' tab, a group will automatically be created for you should you ever wish to use it again.**

## Message Content

**For the content of the message itself you can opt to use either a template, or create a brand new message.**

**To type a new message, just enter your required text into the 'Message' text box. The counters above show the number of characters used by your message, and also the number of message credits required to deliver your message to each individual recipient. If your message is only slightly over one message in length, why not consider using the 'Convert to Shorthand' button?**

**Message**

...select message template

Number of characters: 0      Number of messages: 0      Characters per message: 160

[Large yellow text input area]

**To use a template, select it from the drop-down list (you must have already saved your template on the Templates screen). It will appear in the message box where you can make any modifications if necessary.**



## Advanced Options

**Advanced options**

Append signature:  (txttools)

Insert into message:

Source:

**Append signature:** If you select this box it will append your signature to the end of your current message – for convenience the currently saved signature is displayed in brackets. Note that this will add characters on to your message.

**Insert into message:** With this feature you can insert merge-tags into the message using the four grey buttons. Each will be replaced upon sending with the appropriate field from the recipient's contact details within the address book. So a %%FIRSTNAME tag will be replaced with the recipient's first name, and so on.

**Source:** This enables you to set what should appear in the 'from' field on the recipient's phone; by default this is usually your dedicated number.

For some accounts this field is editable, allowing you to specify what will appear. For example, you may put a personal or institution mobile number, so that messages appear from that number, and any replies go to that number.

You may also put your institution or a name in that field. Please note that with any option that includes text (institution name for example), the field is limited to 11 characters. Also with this option, the recipient would not be able to reply directly to the message, as the text would not count as a valid phone number for the message to go to.

**Convert to short hand:** after your message has been written and this button is selected the application will abbreviate certain words for you.



## **Date and Time**

Finally, you can set the exact date and time that you wish the message to be sent out using the two radio buttons at the bottom of the page.

To send a message immediately, leave the radio button next to 'Send' selected.

Alternatively, you can schedule the message to be sent at a specific point in the future by using the drop down boxes to specify the exact date and time you wish the message to be sent out (ensuring that the correct time zone is also selected).

Once the message has been sent out or scheduled, the application will automatically take you to the Outbox, and you will see the message 'Your message has been processed successfully' at the top of the page. If the message was scheduled, you will see the it on this page and it will remain here until it is ready to go at the specified Time and Date.

## **Previewing and Sending Your Message (including email)**

Once you are happy with your message, double check the following:

- Your intended recipients are all selected
- Your message reads as you intend
- The desired time for delivery is set
- Any additional options have been set as required

You now have two options, you can send/schedule the message straight away, or preview it first (which allows it to be sent as an email). To send the message instantly, press the 'Send' button.

If you wish to preview your message first, press the 'Preview' button and a screen like the one below will be displayed:



**Preview message**

Message

Test

Date & Time: 2010-07-07 15:08:39.426

Source: 88020

Back Send

Individual Recipients

SMS	Email	Recipient Name	Recipient Email
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Test, Test	test@testdemo.co.uk

SMS Select: none | all | invert  
E-mail Select: none | all | invert

You can then check to see if the details you entered are correct. **We strongly recommend you preview a message before sending it out, as once a message has been sent it cannot be retrieved.**

In addition, if you have email addresses stored for your contacts, you can copy the message to their email addresses by checking the 'Email' box next to their name.

Once you click 'Send', the application will take you to the Outbox.

## Unicode

txttools gives the opportunity for users to send out messages using non-Latin alphabets (Arabic or Greek for example) or to add non standard characters. These are known as Unicode characters. In order to send out a message in unicode, there is no difference to your regular process, simply type the required message into the message box as normal. The application will automatically recognise the unicode nature of the character and an alert will appear.

When sending messages with unicode characters, the message limit is set as 70 characters instead of the usual 160 characters due to the nature of the characters used. Also please be aware that not all phones are able to read unicode characters so the recipients may not be able to see the message.

## Outbox

The outbox contains all messages that have been scheduled to send at some



point in the future. Do not be alarmed if you have just sent a message and nothing appears here – your message will be logged on the sent page.

If you have messages scheduled, they will appear in a list on this page displaying the message content, the intended recipient(s) and the date and time the message is scheduled to be sent in your local time.

**Outbox**

List messages | Search | Schedule Calendar Messages

Your message has been processed successfully.

2 items found, displaying all items.  
Page: 1

Type	Recipient	Message Text	Message Source	Send Time
	<input type="checkbox"/> Test, Test	test	88020	Jul 4, 2019 2:45 PM
	<input type="checkbox"/> Normal	Hi %%FIRSTNAME test	88020	Jul 2, 2020 12:45 PM

Select: none | all | invert | Delete Selected Messages

Create a Report of the above as  CSV |  Excel |  XML |  PDF

## Editing and Cancelling Scheduled Messages

To edit a scheduled message, just click on it in the outbox. You will be returned to the Compose page where you can make changes to the message itself, the recipients or the time the message is scheduled to be sent.

To cancel a scheduled message, you need to delete it from the outbox. To do this, check the box next to the message you wish to cancel in the outbox and click the 'Delete Messages' button. Once a message has been deleted it will not be sent out.

## Searching for Messages

You can schedule an unlimited number of messages to be delivered at any time



you wish. To make finding these messages in the Outbox easier a comprehensive message search option is available.

Selecting the search option will display the small form, which you can use to specify your search query.

You can search messages for their content, recipient's name or number, or the date they are scheduled/were sent/were received. You can also select for results that are 'like' (i.e. contains) the search query, start with the search query or are an exact match.

Select the maximum number of results to return and type your search query into the text field. Clicking the 'Search' button will return the results of your search below.

Ensure your search query matches the message field you selected in the first drop-down box, else your search will return no results! (e.g. If you are searching for a recipient's phone number, ensure your query is a phone number!)

## iCal Uploads

[Schedule Calendar Messages](#)



**You can schedule messages using your desktop calendar application by exporting your calendar as a .ical file, which you can upload to your account to schedule messages for the events you have on your calendar.**

**Please note that Microsoft Outlook does not support this natively.**

**To do this, firstly schedule events for which you wish to send text messages within your calendar application, ensuring the content of your text message is set as either the title or description of the event. Export your calendar to a .ical file.**

**From within your txttools account, navigate to the Outbox and click on the 'Schedule Calendar Messages' button in the menu bar.**

**Finally, select the individual(s) or group(s) that you wish to receive the message(s). Note that every message that is scheduled will be sent to all of the contacts that you select.**

**Once you are satisfied with your selected options, browse for your .ical file and when this is selected click the 'Schedule' button. Once the upload is complete you should see all your messages listed in the outbox. You can make modifications if necessary by clicking on the message in question.**

**Messages scheduled via iCal upload will be scheduled for the date and time of the event in the calendar file.**

## **Sent**

**The Sent page is an archive of all the messages ever sent out from your account. From this page you can access a detailed breakdown of exactly what has been sent, how many messages you have used, who you have sent messages to, and also check if messages have**



been received successfully.

No messages can be deleted from your sent page as this provides a searchable audit trail for all your messages.

Clicking on a message on the sent page will display a detailed status update for that particular message, including the individual recipients and a confirmation of whether the message was successfully delivered or not.

## Message Status Updates

To access status update information, click on the message you are interested in on the Sent page.

There will be an entry in the displayed table for each individual phone number that the message was sent to. Five columns will be displayed, showing in order: the name of each individual recipient, the recipient's mobile phone number (allowing you to check it at a glance), the exact message text sent to them, the time the latest status update was received, and finally the current status of the message.

The three possible statuses are as follows:

### Status Key:

-  Failed - will not be delivered to the mobile phone.
-  Sent - no errors or handset delivery confirmation received.
-  Delivered - confirmed as received by the mobile phone.

## Interpreting Status Updates

The green status with a tick confirms that the message has been delivered to the recipient's mobile handset.

How it works - when a message is delivered to a mobile phone, the phone itself sends a notification to the mobile network (O2, Orange, Vodafone, etc...) to say the message has been delivered, to prevent it being delivered again. The





networks then pass this notification on to us, so we can confirm that your message has been delivered to that phone.



The green tick indicates that the message has been received by the handset.



The red status indicates that a message has failed for one reason or another. If this status appears, the message definitely has not been delivered, and neither will it be. There are a few different explanations for this, which are outlined below.



The green status with no tick inside will appear on any message that has not been confirmed as delivered or failed. It is essentially interpreted as message 'pending' - the network still has the message, but attempts to deliver it have not succeeded at the current time, possibly because the target phone is switched off or has no service. The network will then attempt to re-deliver the message for a minimum of 24hrs.

## Reasons for Message Failure

Messages fail for several reasons. The most common include the target mobile phone being out of range for too long (either with no service or switched off) or the mobile number being invalid. Here is how to spot each instance:

**If you have a red (failed) status within a few minutes of sending the message out** – then the mobile number is probably invalid. In these cases you should check the number with the contact themselves, and not resend the message.

**If you have a green (pending) status for at least 24 hours, which then turns to a red (failed) status** - then the phone was probably out of range for too long, either switched off or with no service. It may be worth attempting to resend the message.

## Sorting Messages via Status

You will see at the top of the screen to view messages with a particular status.

If you select to just view the failed messages, an option will appear to remove these contacts from your address book. This allows you to remove potentially out of date numbers from the address book.

Please note that you *are* charged for messages that fail as a result of you uploading an incorrect or invalid phone number to your addressbook. This is due to the phone networks charging for each attempted delivery.



## Locating Failed Messages

In addition to using the option outlined above, clicking the “List Failed Messages” option in the menu bar will display a list of all messages that have been sent where one or more recipients did not receive the message. Clicking on the individual messages will display the detail breakdown of status updates. This is again useful for locating contacts for whom the stored number may be out of date or invalid.

## Searching for Messages

An infinite number of messages can be stored on your sent page. To make finding a specific message easier, a comprehensive message search function is included.

A screenshot of a web application interface for searching sent messages. At the top, there is a navigation bar with four tabs: 'List messages', 'List failed messages', 'Search', and 'Statistical reports'. Below this is a section titled 'Sent Message Search Criteria'. It contains three dropdown menus: 'Message field' set to 'Content', 'Search mode' set to 'Like', and 'Max results to return' set to '100'. Below these is a text input field labeled 'Search for' and a 'Search' button.

## Message Statistical Reports

Message statistical reports allow you to access a detailed report of how many messages were sent over a period of time – you can also see how many of these messages were confirmed delivered to the recipient.

To open this screen, click the 'Statistical Reports' button at the top of the Sent page. To create a full report, use the drop down boxes to select the **date range** you are interested in – clicking 'Go!' will bring up the table and a chart beneath containing the statistical data (1).

Your account, and any sub accounts you have, will be listed complete with total



messages sent in the selected period broken down into the number sent, failed and still pending. Clicking on a sub user will show the same data for their account.

If you have an abnormally high number of failed messages it is always a good idea to contact txttools Support so we can investigate for you.

**Message Statistics**

List messages | List failed messages | Search | Statistical reports

Either select a date range between  and  (inclusive)

Or show total usage for the past  months (including this month).

(nb. due to the complex nature of these queries, results may not display instantly... please be patient)

Alternatively, you can select usage for the past number of months which will give an overall monthly usage chart instead (2).

**Usage Overview**

User	Failed	Sent	Confirmed	Total
Test	6	4	33	43
This account only	0	0	2	2
Sub users only	6	4	31	41

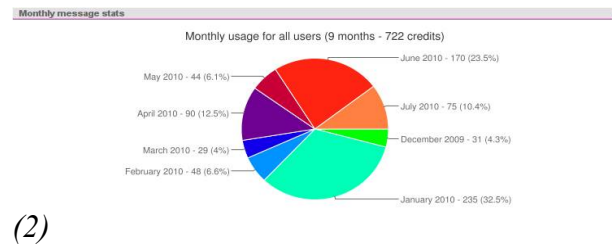
Message statuses for messages sent by all users

Status Key:  
 Failed - will not be delivered to the mobile phone.  
 Sent - no errors or handset delivery confirmation received.  
 Delivered - confirmed as received by the mobile phone.

**Sub Users**

User	Failed	Sent	Confirmed	Total
Test 3	0	0	2	2
Test 2	6	4	29	39

Sub user totals



(2)

## Inbox

(1)

If your license includes two-way messaging, your contacts will be able to reply to your messages, or send texts directly from their mobile phones to your account. Two-way accounts will have an Inbox with one or more dedicated numbers attached to it – this number can resemble either a mobile phone number, a local landline number or a shortcode number depending on how you chose to have this set up.

If you do not have a dedicated number/inbox, but would like one, or would like to check what your number is, please contact txttools Support.



## Keywords

In many cases, your dedicated number will be shared by a number of people, each with their own account. In order to direct messages to the correct account, your account will have a **keyword** attached to it. A keyword is a short string of characters that needs to be placed at the start of a message, followed by a space and then the rest of the message, and sent to your dedicated number. This acts a little like an extension number and forwards the message to your specific account.

Note that keywords are not case sensitive, the following example uses capitals for emphasis:

If my account has the dedicated number 0113 234 2111, and the keyword is TXTTOOLS, then in order to send a message to my inbox it would need to look something like:

TXTTOOLS this is a message that will be delivered to my inbox...

...which would then be sent to 01132342111.

Incorrect or missing keyword messages will end up in the default account for your institution (normally the main administrator account).

If you are at all unsure about keywords, please do not hesitate to contact the Support Team who will be happy to assist.

## Checking your Messages

The txttools inbox closely resembles the look and feel of most email clients (notably Gmail due to the use of labels) and operates in a very similar way.

When the Inbox is opened, the messages are listed with the most recently received at the top, and you can see information including who the message is from (you will see the contact's name if it is stored in the address book) and when the message was delivered.



**Inbox**

List messages | Search | Inbox rules | Inbox labels | Inbox stats

Display

4 items found, displaying all items.

Page: 1

	Message	Source	Delivery Date	Inbox labels	Add label
<input type="checkbox"/>	TeStInG who's there?	07111111111	Jul 15, 2010 3:54 PM	Demo	<input type="button" value="select"/>
<input type="checkbox"/>	Testing what's up?	07000000000	Jul 15, 2010 3:52 PM	Demo	<input type="button" value="select"/>
<input type="checkbox"/>	TESTING txttools	88020	Jul 15, 2010 3:50 PM	Test	<input type="button" value="select"/>
<input type="checkbox"/>	testing Hi there	07000000000	Jul 15, 2010 3:50 PM	1 Test	<input type="button" value="select"/>

Select: none | all | invert    BAD

Create a Report of the above as

From this page there are also various other options available. In the top left there is a 'Display' sign; using the drop down menus adjacent and then clicking 'Go!', you are able to filter your messages to view New, Read or Replied messages, and you can also view specific labelled messages (see Inbox Labels, p.40).

On the left hand side next to each message there is a small tick box. These are used to activate the functions at the bottom of the page. By selecting the relevant message(s), you can:

- choose to delete messages (individually or en masse)
- mark messages as read or unread
- pass messages down to subuser accounts by selecting the relevant subuser from the menu and clicking on 'Pass to subuser'

## Checking your Messages continued...

Clicking on a message will display the details of that message in full – including the complete message text. When you have clicked on a message, it will be marked as 'read' (an open envelope symbol). You can choose to mark messages as 'unread', which can be useful for shared accounts so that your colleagues can easily see which messages are new. When a message is opened you will also see all the reply options for that particular message:



**Inbox Message Details**

List messages | Search | Inbox labels | Inbox stats

Move message to subuser's Inbox:

---

**Message**

<b>Message Content</b>	TESTING txttools
<b>Message Source</b>	88020
<b>Delivered at</b>	Jul 15, 2010 3:50 PM
<b>Message Sent To</b>	+447624803111

## Deleting or Replying to Messages

From the details screen you can select the appropriate buttons to delete the message from the inbox or reply to it. Alternatively, you can just return to the inbox.

## Moving Messages

If you have subusers underneath your account, you can move a message directly into their inbox using the drop down list at the top left if you are in the message (or the menu is at the bottom of the main Inbox page). Simply select the subuser and click 'Pass to Subuser'. The message will be transferred to their txttools inbox. **Once the message has been moved you cannot retrieve it!**

## Searching for Messages

Like the Outbox and Sent pages, your Inbox is unlimited in size – meaning you never have to delete another message. To make finding specific messages easier, a comprehensive message search option is included.

You can also use the drop down menu in the top left hand corner to filter the messages that are displayed by Read, Unread and Replied.



## Conversations



The Conversations page is a new feature which allows the user to see all their correspondence with a specific contact at a glance. To access the Conversations page, just click on the speech bubble sign next to the relevant user on the Inbox page:

**Viewing Conversation**

List messages | Search | Inbox labels | Inbox stats

**Conversation with Demo Test (+447976750970)**

This page shows all messages sent and received between your account and phone number +447976750970. Messages you sent appear on the left and messages received from the contact appear on the right.

Scroll to newest

**Received: Jul 8, 2008 7:57 AM**  
Sent to: 88020  
Sking Hello all...

**Sent: Jul 21, 2008 10:25 AM**  
TeESsjnva,dkjfn

**Received: Oct 7, 2008 10:21 AM**  
Sent to: 88020  
Sking txttools test Hi

**Sent: Oct 7, 2008 4:00 PM**  
Test

## Inbox Labels

Inbox Labels is a new feature that works a little like email folders, in that it allows the grouping of incoming messages. These labelled messages can then be viewed separately or even compared to monitor numbers of specific responses. You can also automate Inbox labels so that any messages sent into a certain keyword will automatically be assigned a label.





Message	Source	Delivery Date	Inbox labels	Add label
TeStInG who's there?	07111111111	Jul 15, 2010 3:54 PM	Demo	select
Testing what's up?	07000000000	Jul 15, 2010 3:52 PM	Demo	select
TESTING txttools	88020	Jul 15, 2010 3:50 PM	Test	select
testing Hi there	07000000000	Jul 15, 2010 3:50 PM	1	select

## Creating Labels

Inbox labels can be found on the Inbox page. To create an Inbox label, just click the 'Inbox labels' button found towards the top of the Inbox page. Here, simply type the name of the Inbox label in the message box and press 'Add Label'.

## Assigning Inbox Labels

To allocate Inbox labels, navigate to the Inbox page. On the right hand side next to each message, you will see a series of drop-down boxes. This drop-down box contains a list of all the Inbox labels on the account; by selecting a label from the list, you can assign that label to a certain message. It is possible to have multiple Inbox labels on the same message.

You can remove Inbox labels from a message by clicking on the red “delete sign” that appears next to the Inbox label found just to the left of the Inbox label drop-down list for each message.

## Deleting/Editing Labels

Deleting and editing Inbox labels is done on the Inbox Labels page (click on 'Inbox', then click on the link marked 'Inbox Labels').

To edit an Inbox label, double click on the existing Inbox Label's name. This will allow you to make any changes you require; once done, just click 'Save' to confirm these changes.

To delete an Inbox label, click on the red delete sign that appears next to each Inbox label. This will bring up an 'Are you sure?' warning where you can click OK to confirm the deletion.





**Inbox**

List messages | Search | **Inbox labels** | Inbox stats

---

**Existing Labels**

Double click on a label's text to edit. (You have to click the save button for the change to be saved).

<input type="button" value="-"/> 1	<input type="button" value="-"/> 2
<input type="button" value="-"/> Demo	<input type="text" value="Test"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>

## View/Compare Inbox Labels

To view the messages assigned to each Inbox label, you will need to be on the Inbox page. Here you will see some Display drop-down boxes on the top left. The second one will allow you to choose any of the Inbox labels on your account. Selecting the appropriate label and hitting 'Go!' will display the list of all the messages that have this label assigned.

## Inbox Stats

To quantitatively compare two or more Inbox labels, you can click on the 'Inbox Stats' sub-menu found towards the top of the Inbox page. This allows you to select multiple Inbox labels to compare. You can also tweak 'uniqueness' and 'occurrence' settings if someone has sent a message to more than one label – this can be useful if using the feature for text voting systems.

Once satisfied click Compare to view a pie chart of the results:



**Inbox statistics**

List messages | Search | **Inbox labels** | Inbox stats

---

**Inbox labels**

Select which labels you would like to compare... Only labels linked to messages will be displayed.

Select: none | all | invert

<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2
<input checked="" type="checkbox"/> Demo	<input checked="" type="checkbox"/> Test

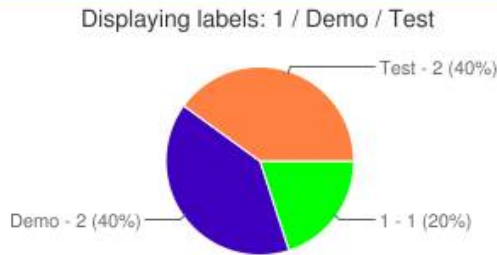
---

**Advanced options for when a contact has sent multiple messages...**

- Display all
- Show unique results (i.e. a contact can only vote once per label).
- Use the earliest occurrence of the selected labels only (per contact).
- Use the most recent occurrence of the selected labels only (per contact).

---

**Comparison chart**



## **Inbox Rules (Administrators Only)**

**Inbox Rules is an advanced functionality only accessible by administrators that enables you to set up your own keywords and actions for inbound messages. It is a very powerful piece of software that gives you complete control over your inbound messages.**

**If you would like Inbox Rules to be set up on your account (all new customers have this by default) please contact txtools Support. There is a separate, in depth manual**



for Inbox Rules which is available under the manuals link on the Home page.

Note that inbox rules can only be set up on your dedicated long number. If you require keywords on our marketing shortcode, you **must** contact Support first to check availability!

## Services

Services enable you to automate message sending over a fixed period. These services may repeat the same message periodically or send out a set of messages at regular intervals.

In addition, you can use our RSS-2-SMS functionality to convert RSS (RSS – Really Simple Syndication) feeds to text messages, and deliver this content directly to mobile handsets – great for keeping contacts up to date with the latest news on a particular topic.

For an example – why not check out our Moodlext Development RSS Feed at <http://www.moodlext.com/rss.xml>. If you want to see how this content can be delivered to your phone, text MOODLETXT to 88020 to subscribe to automatic SMS updates!

There is a separate guide for Services that is also found under the manuals link on the Home page. Alternatively, you can contact our Support team who would be happy to talk you through the different options available with this feature.

## Security

The security of your account and the sensitive data it contains is paramount to us. There are a number of security measures in place on your account:

- **30 minute time-out:** After thirty minutes of inactivity, your account will automatically time out and you will need your username and password to access the system again. Please note that this **cannot** be changed. There are however 2 methods of circumventing this: if you remain on the Inbox page, it automatically refreshes itself every minute (to check for new messages) and thus keeps the session



active. Alternatively some browsers can help - Firefox web browser has an extension called ReloadEvery which can force any page to refresh.

- **Secure Servers:** Note the https:// at the start of the web address, and the lock symbol (likely to be either by the address line at the top or the status bar at the bottom of the page, depending on your browser) – this all indicates that any information you send or store with us is heavily encrypted.
- **Password Protection:** Only the password holder for an account can send messages out – administrators, including the team at txttools, cannot send messages on your behalf.
- **Audit Trail:** Every message you send out is automatically stored on the system and can be retrieved at a later date by a fully customisable search function. Full message credit management enables you to track any misuse of the system.
- **Dedicated Hourly Checks:** Here at txttools, we perform four different hourly checks to ensure the smooth running and integrity of the system.

In addition, our staff are CRB checked and we work to the same security protocols as internet banking.

Please note that you should keep your password secret at all times. txttools will NEVER ask for your password, and you should not disclose it to anyone.

If you ever feel the security of your account has been compromised, you should change your password immediately and contact txttools Support on 0113 234 2111 as soon as possible.

## Logging Out

Clicking the 'Logout' button at the top right hand corner of any screen whilst not logged in as a sub user will end your session and return you to the txttools.co.uk homepage. In order to re-access the system you will have to enter your username and password again.

If you are logged into a sub user's account, clicking the logout button will return you to that account's super user.



## **Closing the Browser**

If you close your browser, your txttools session will remain active until you are logged out automatically after 30 minutes. This means that during this period, if the same browser were re-opened and pointed at txttools.co.uk, you would still be logged in.

For maximum security on public and shared computers you should always logout with the button provided, before closing your browser or navigating away from the site.

## **Contacting Support**

If you experience any difficulties when using txttools, or have any queries or suggestions, please do not hesitate to contact our dedicated Support Team:

**Olivier Tane – Customer Support Manager**

**Sam King – Customer Support**

**Martyn Ryan – Customer Support**



**Office Hours: 8am - 5pm, Monday - Friday**

- Tel:** 0113 234 2111
- Email:** [support@txttools.co.uk](mailto:support@txttools.co.uk)
- Skype:** txttools\_support
- Live Chat:** Click on the Live Help! button for instant help and advice.

**Out of Hours Emergencies**

Outside these hours emails are checked periodically. In an emergency Olivier may be contacted on 07817 577380. Out of hours we may not be able to solve issues immediately, but we endeavour to resolve things A.S.A.P.