



TXT2Remind Version Number:	4.0
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Security Classification:	All Clients

TXT2Remind 4.0

Import from Query Builder

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1 Introduction

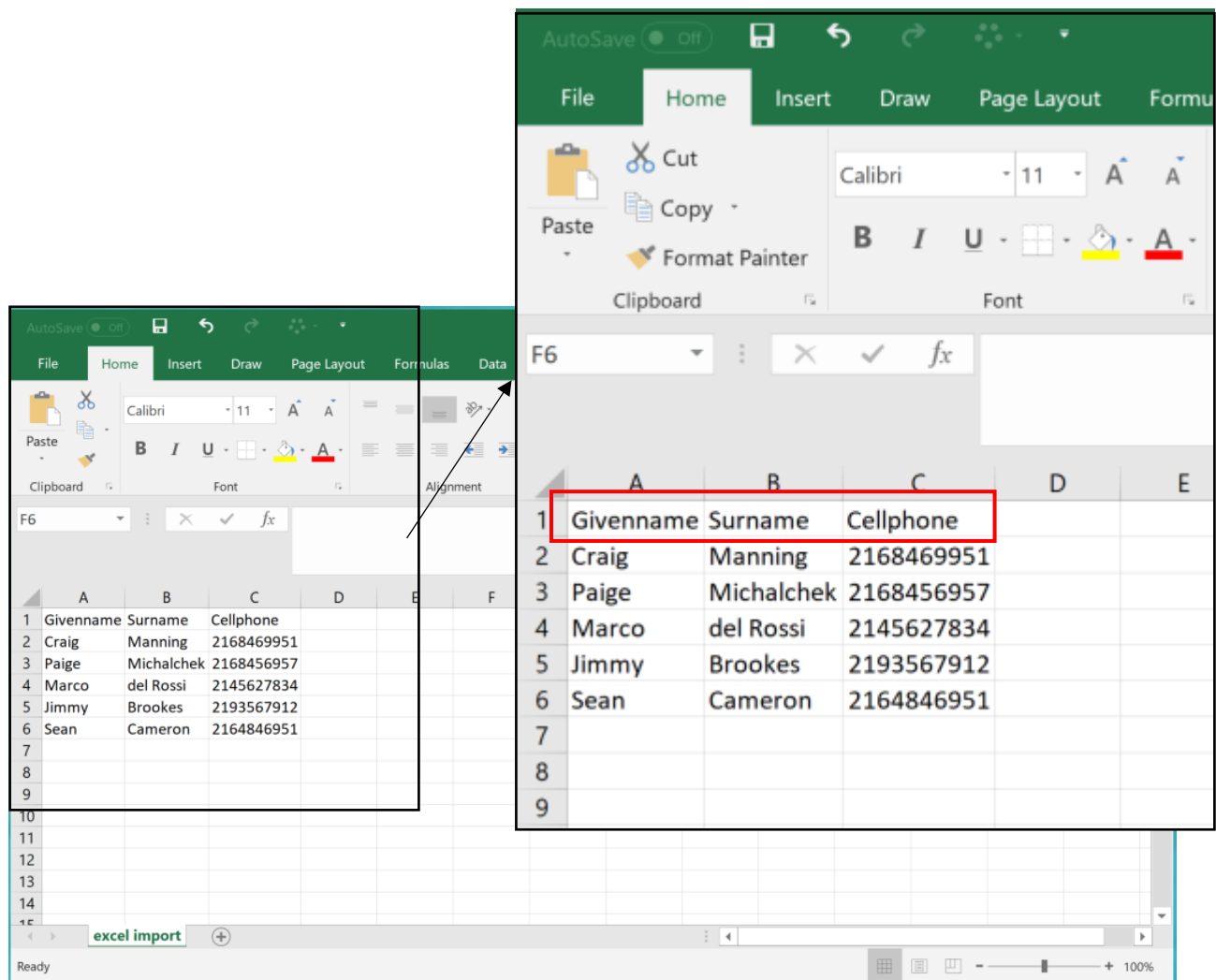
The Import from Query Build tool in TXT2Remind application allows the practice to send a bulk text to a patient list that comes from a .CSV file. This may be created by the practitioner or exported from an outside program.

2 Create your .csv file

Create your patient list as a .csv file. This may be one you create on your own, or export from another program.

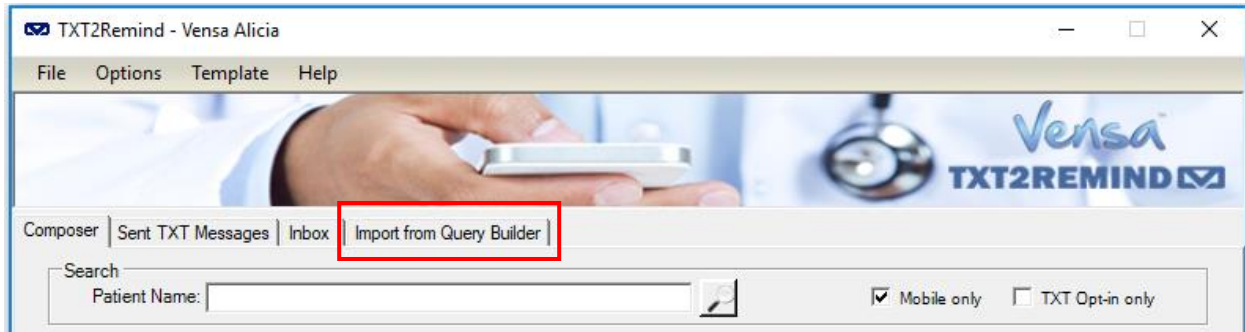
The spreadsheet needs column headers, and **Givename**, **Surname** and **Cellphone** must be included. There may be more columns with other information, which is OK and will not affect the import into TXT2Remind.

Your phone numbers may start with '02', '642', have nothing in front of the two etc, and will still work. Likewise, if there are spaces, dashes or letters on the end (e.g. m for mum or x for no text), these will be ignored, and the message will send, so ensure you are happy with your list.

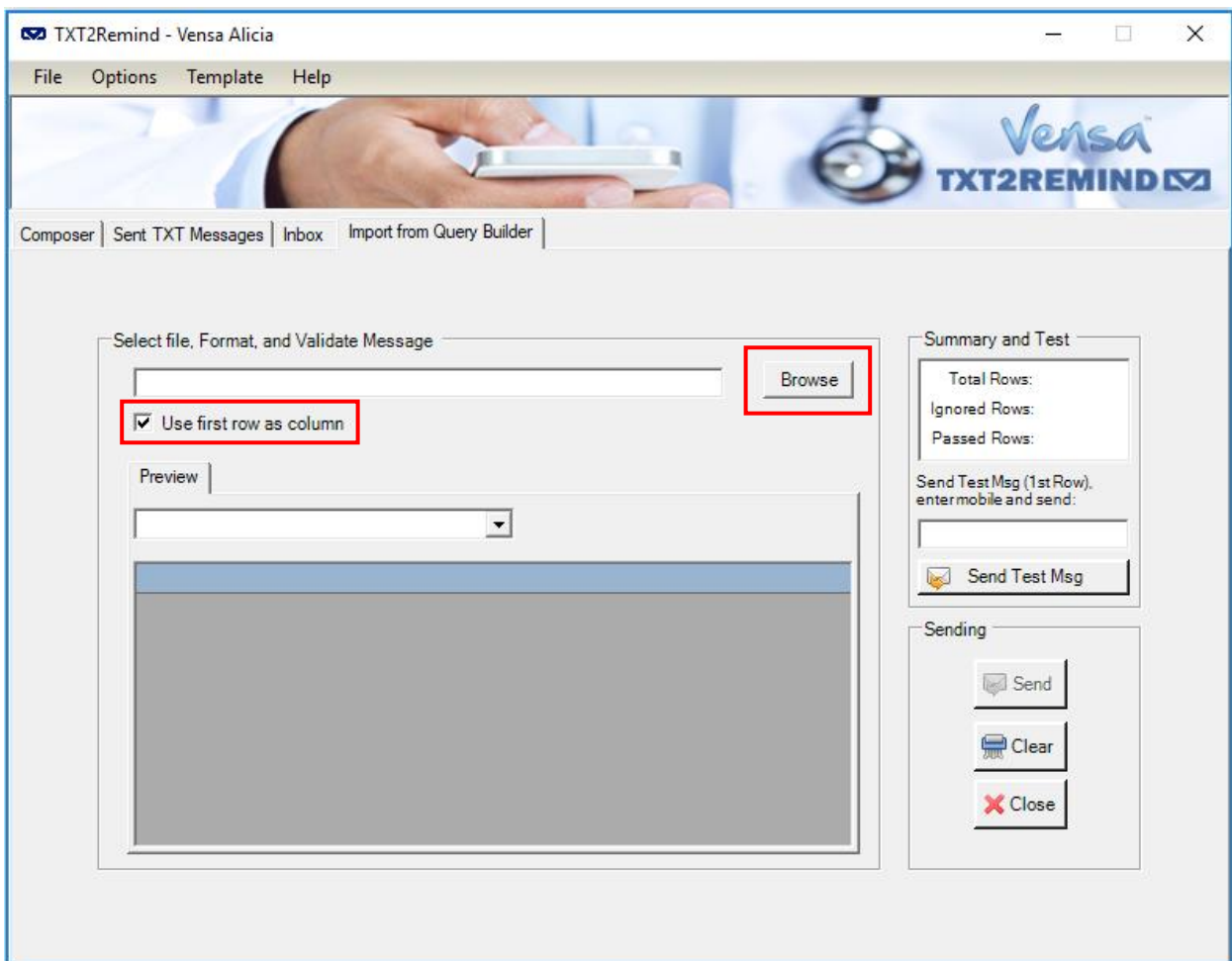


3 Set up a bulk text

- a. Open TXT2Remind for Medtech and click the 'Import from Query Builder' tab



- b. Click 'Browse' and find your .csv file. Ensure 'Use first row as column' is ticked so that the application recognises your spreadsheet column headers.



c. This spreadsheet will then populate the Preview window.

	Givenname	Surname	Cellphone
▶	Craig	Manning	2168469951
	Paige	Michalchek	2168456957
	Marco	del Rossi	2145627834
	Jimmy	Brookes	2193567912
	Sean	Cameron	2164846951
*			

- d. Click the 'Format and Validate' tab. This is where you can:
- Validate that all rows have a valid cellphone number to receive the text
 - Create you text message or choose a template
 - Test your messages before sending
 - Send your message

File Options Template Help

Composer | Sent TXT Messages | Inbox | Import from Query Builder

Select file, Format, and Validate Message

C:\Users\ajohnston\Desktop\excel import.csv Browse

Use first row as column

Preview **Format & Validate**

-- select a template --

Type your message here or select an existing template from the list above.

Givenname
Surname
Cellphone

Mobile Column: Cellphone Character Left: 86

Summary and Test

Total Rows:
Ignored Rows:
Passed Rows:

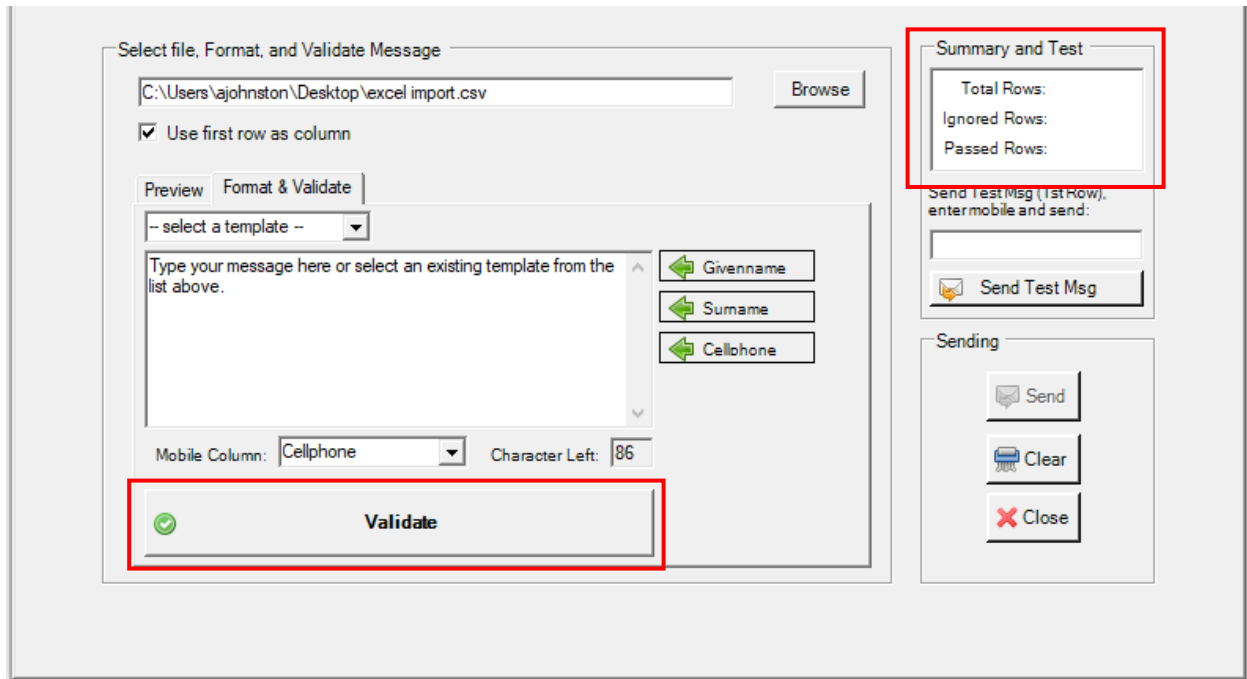
Send Test Msg (1st Row), enter mobile and send:

Send Test Msg

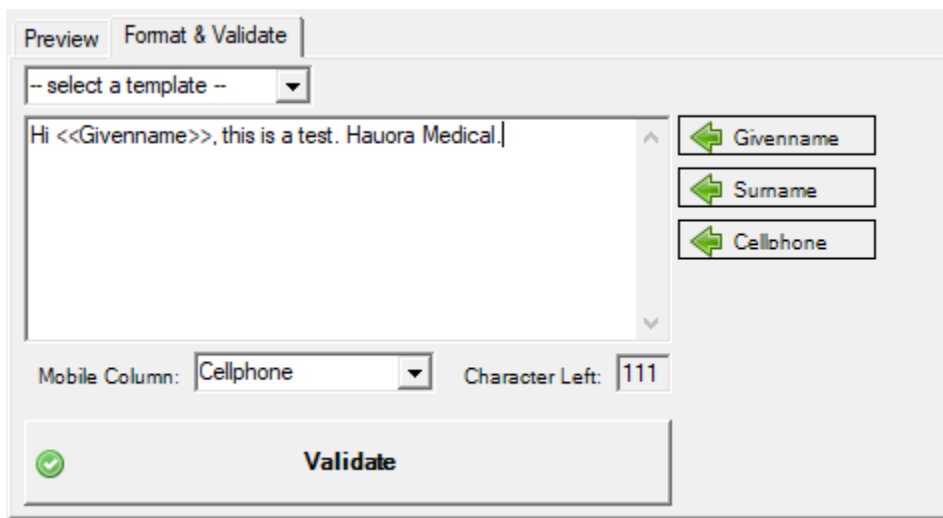
Sending

Send
Clear
Close

- i. To validate your rows, click the 'Validate' button. In your 'Summary and Test' window on the top right, it will display the Total Rows in the spreadsheet. Under this, the number of 'Ignored Rows' is those that do not have a valid cellphone. The 'Passed Rows' do have valid numbers. Ensure 'Total Rows' and 'Passed Rows' match to send to all patients, otherwise review your spreadsheet for issues with numbers.

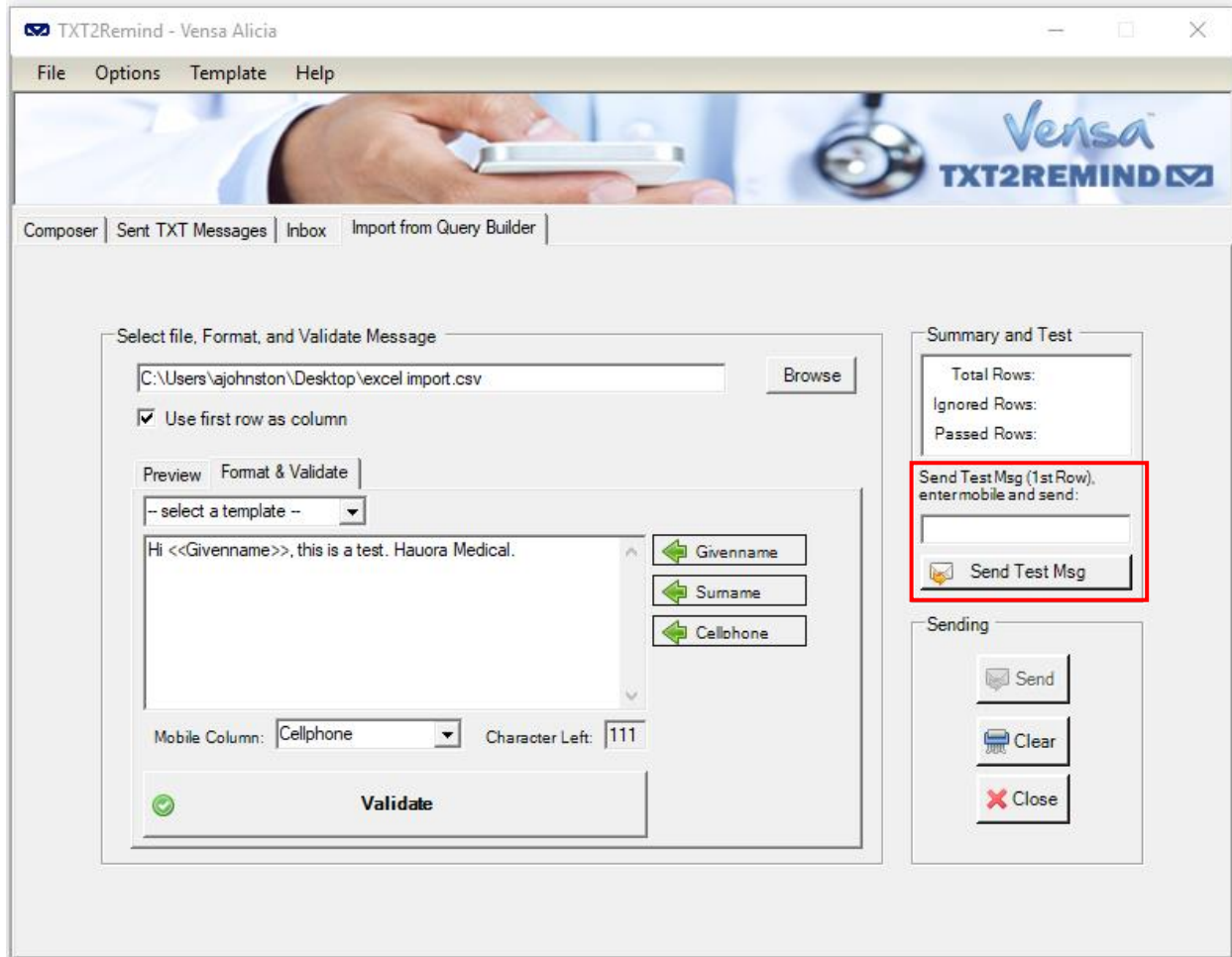


- ii. Type your message into the message window or choose a template from the drop down above it.



NOTE: General templates use a <<FST_NAME>> merge field for names, while the import uses <<Givenname>>. Ensure you are using the right merge field for this document.

- iii. To test your message before sending it in bulk, enter your cellphone number into the 'Send Test Msg' box and click 'Send Test Msg' button. This test text will populate information from the first line of your spreadsheet, so you can see a full preview of what will go out. Therefore, do not be concerned when it sends you a text with a patient name in it.

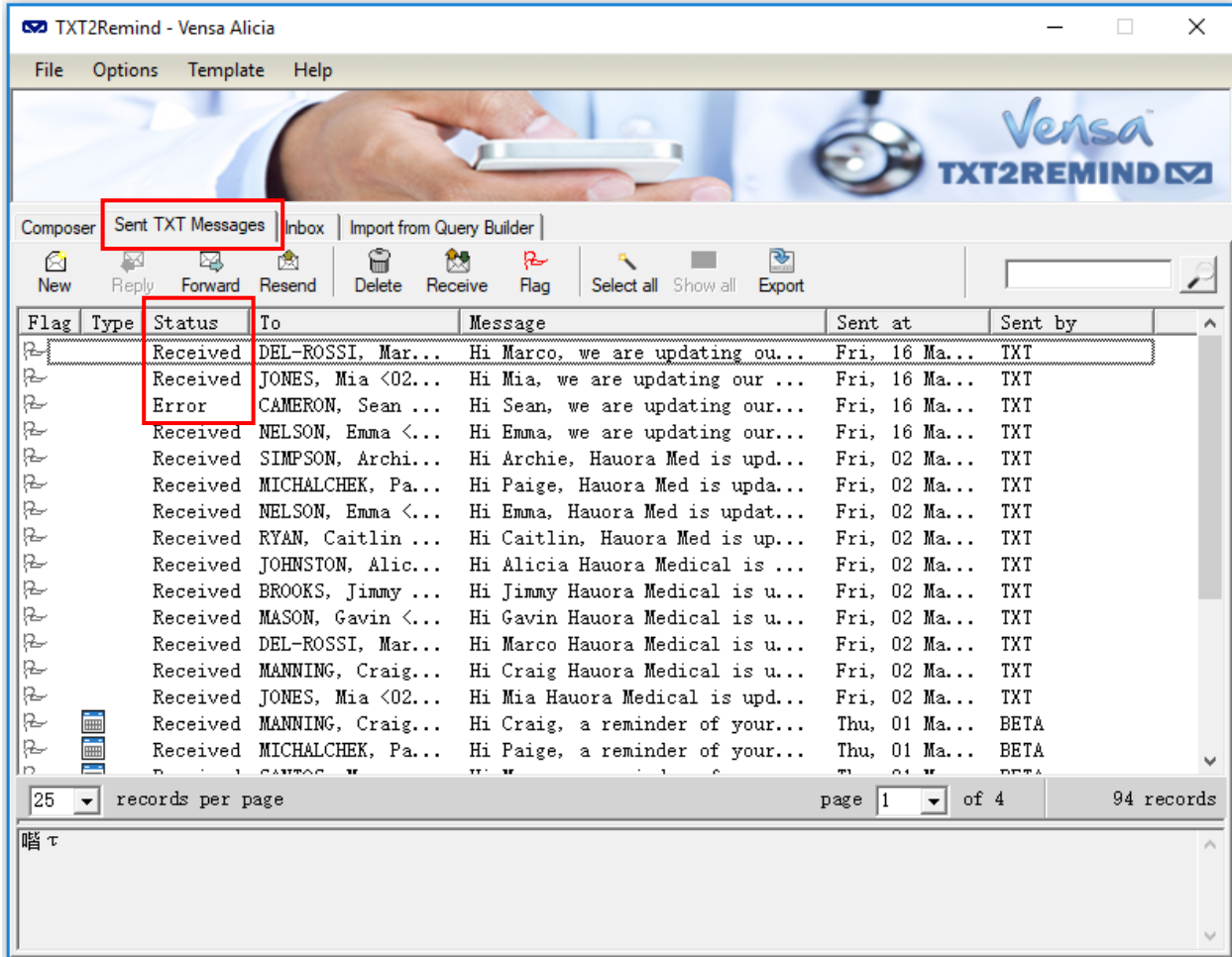


- iv. Once you are happy, click the 'Send' button to send to all.



4 Check status receipts

Your bulk messages will appear in the 'Sent TXT Messages' tab where you can check the Status receipt to ensure it was received by the patients' phone.



The screenshot shows the Vensa TXT2REMIND software interface. The window title is "TXT2Remind - Vensa Alicia". The menu bar includes "File", "Options", "Template", and "Help". The main toolbar contains icons for "New", "Reply", "Forward", "Resend", "Delete", "Receive", "Flag", "Select all", "Show all", and "Export". The "Sent TXT Messages" tab is active, showing a list of messages. The "Status" column is highlighted with a red box, and the "Error" status for the message to Sean Cameron is also highlighted with a red box. The list of messages includes recipients like DEL-ROSSI, JONES, CAMERON, NELSON, SIMPSON, MICHALCHEK, NELSON, RYAN, JOHNSTON, BROOKS, MASON, DEL-ROSSI, MANNING, JONES, and MANNING. The status of these messages is either "Received" or "Error". The bottom of the window shows "25 records per page", "page 1 of 4", and "94 records".

Flag	Type	Status	To	Message	Sent at	Sent by
		Received	DEL-ROSSI, Mar...	Hi Marco, we are updating ou...	Fri, 16 Ma...	TXT
		Received	JONES, Mia <02...	Hi Mia, we are updating our ...	Fri, 16 Ma...	TXT
		Error	CAMERON, Sean ...	Hi Sean, we are updating our...	Fri, 16 Ma...	TXT
		Received	NELSON, Emma <...	Hi Emma, we are updating our...	Fri, 16 Ma...	TXT
		Received	SIMPSON, Archi...	Hi Archie, Hauora Med is upda...	Fri, 02 Ma...	TXT
		Received	MICHALCHEK, Pa...	Hi Paige, Hauora Med is upda...	Fri, 02 Ma...	TXT
		Received	NELSON, Emma <...	Hi Emma, Hauora Med is updat...	Fri, 02 Ma...	TXT
		Received	RYAN, Caitlin ...	Hi Caitlin, Hauora Med is up...	Fri, 02 Ma...	TXT
		Received	JOHNSTON, Alic...	Hi Alicia Hauora Medical is ...	Fri, 02 Ma...	TXT
		Received	BROOKS, Jimmy ...	Hi Jimmy Hauora Medical is u...	Fri, 02 Ma...	TXT
		Received	MASON, Gavin <...	Hi Gavin Hauora Medical is u...	Fri, 02 Ma...	TXT
		Received	DEL-ROSSI, Mar...	Hi Marco Hauora Medical is u...	Fri, 02 Ma...	TXT
		Received	MANNING, Craig...	Hi Craig Hauora Medical is u...	Fri, 02 Ma...	TXT
		Received	JONES, Mia <02...	Hi Mia Hauora Medical is upda...	Fri, 02 Ma...	TXT
		Received	MANNING, Craig...	Hi Craig, a reminder of your...	Thu, 01 Ma...	BETA
		Received	MICHALCHEK, Pa...	Hi Paige, a reminder of your...	Thu, 01 Ma...	BETA