TXT2Remind Version Number:	4.0
Document Date:	20/03/2018
Security Classification:	All Clients

TXT2Remind 4.0

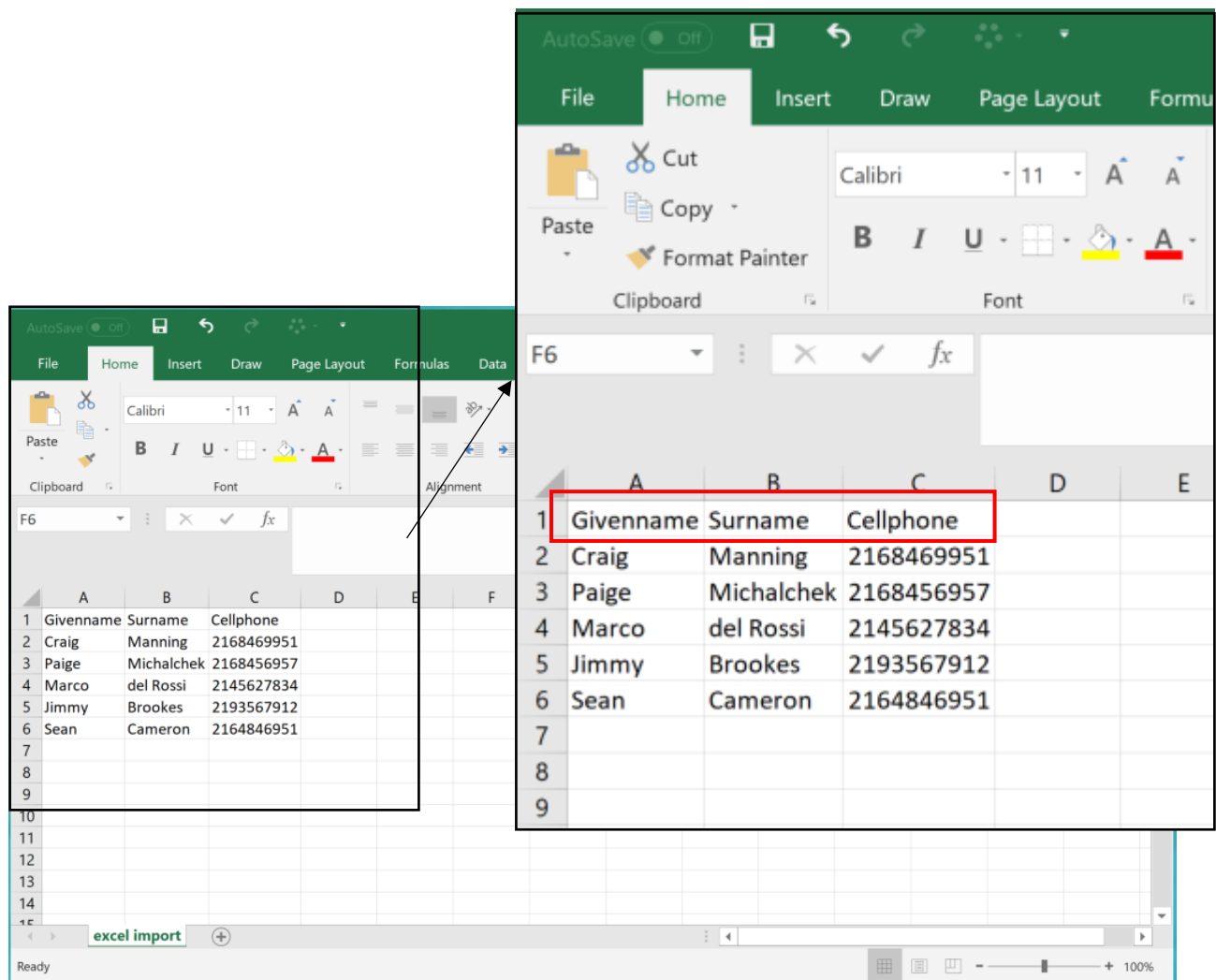Import from Query Builder

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 **Givenname**, **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.
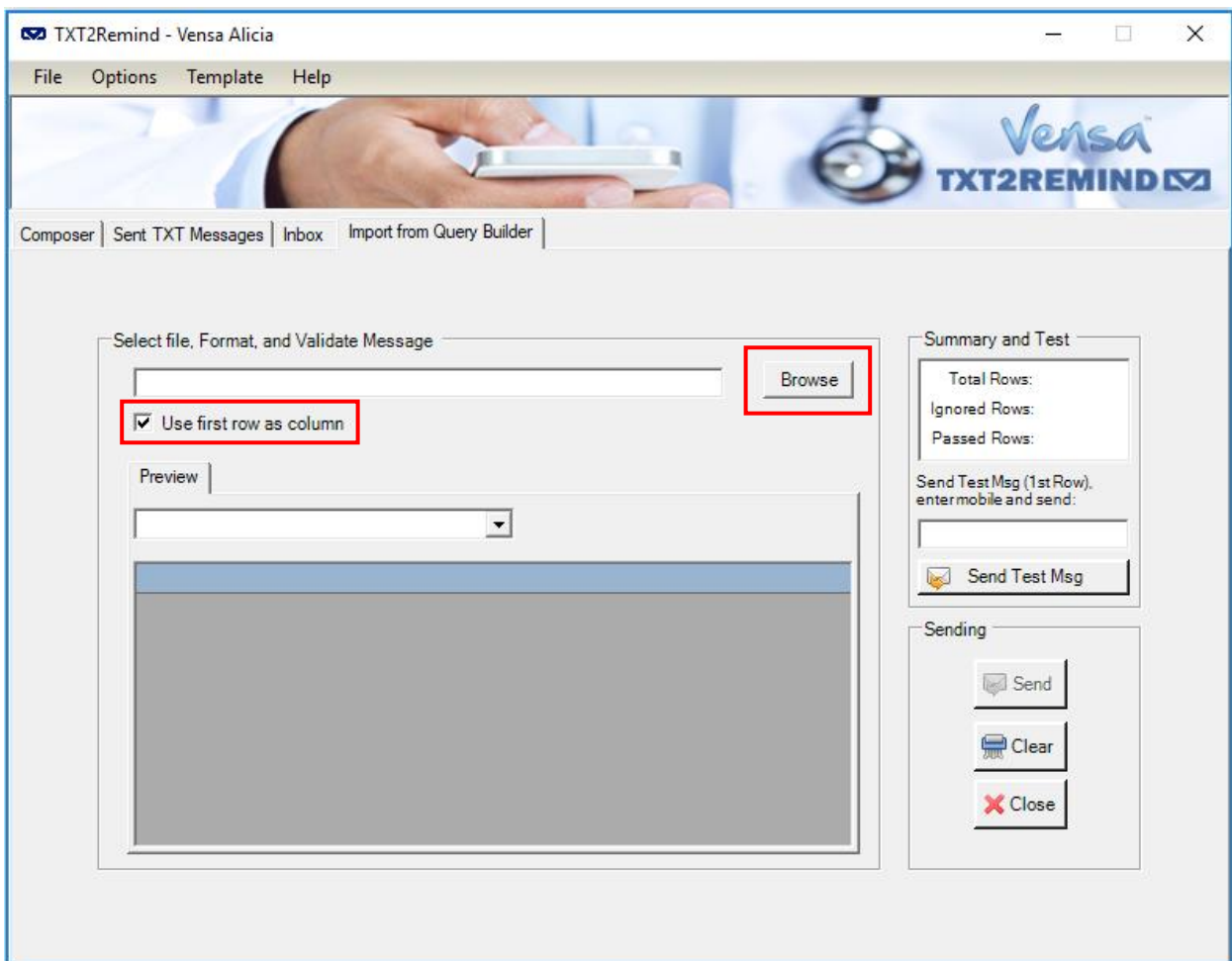
3 Set up a bulk text

a. Open TXT2Remind for Medtech and click the 'Import from Query Builder' tab
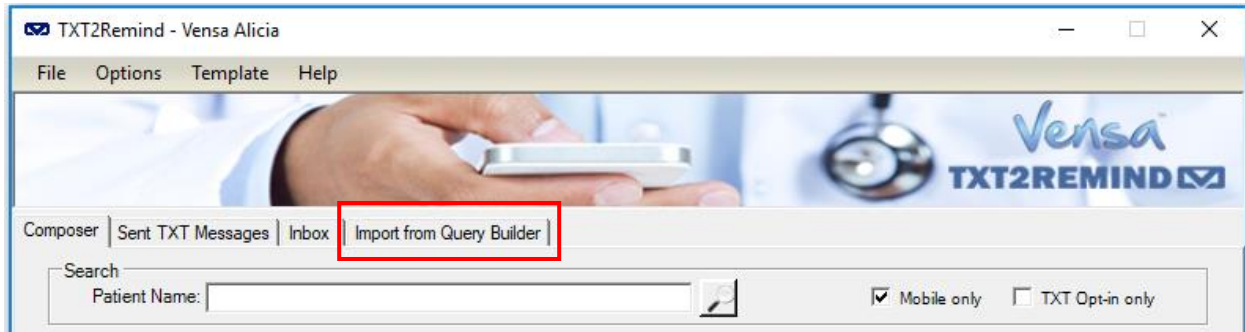
b. Click 'Browse' and find your .csv file. Ensure 'Use first row as column' is ticked so that the application recognises your spreadsheet column headers.

c. This spreadsheet will then populate the Preview window.

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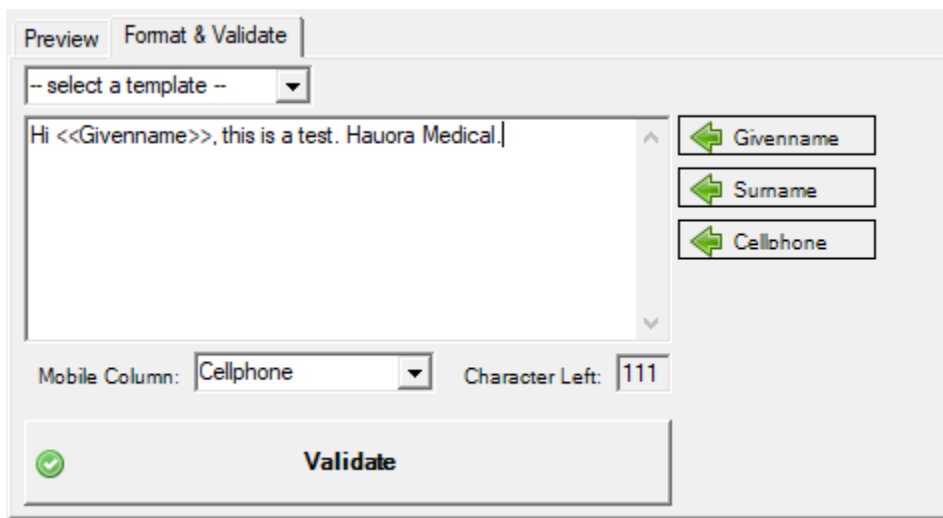   iii. Test your messages before sending
   iv. Send your message

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.
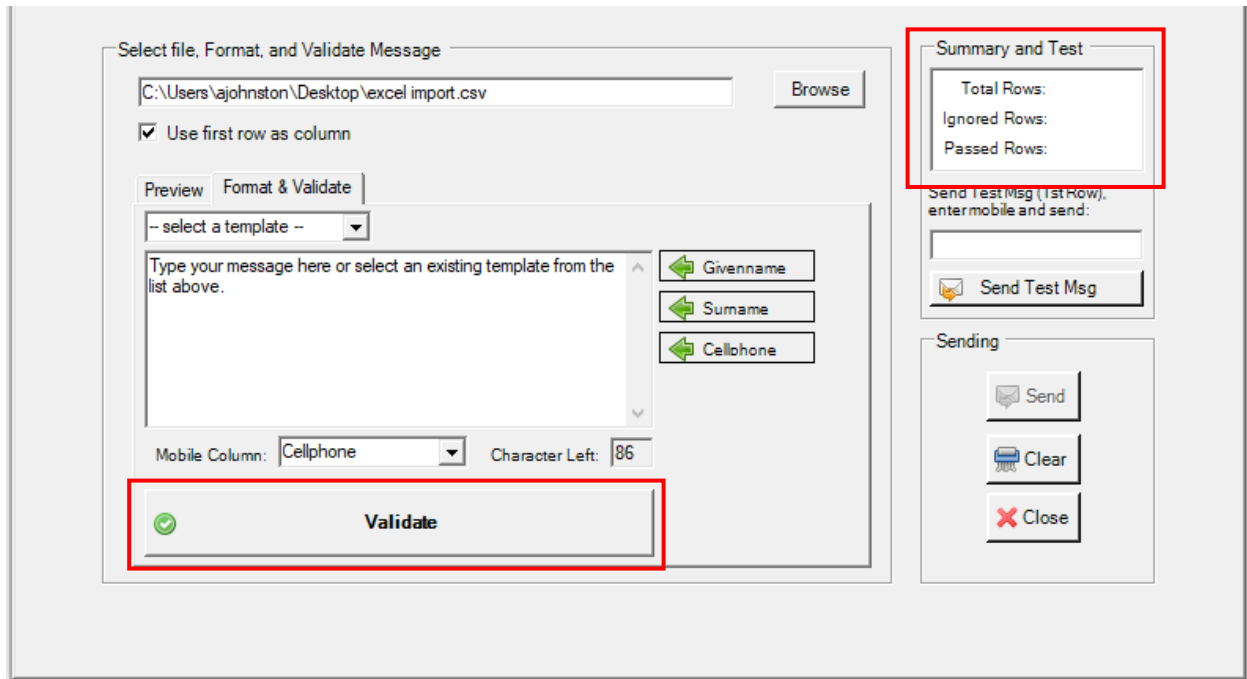

ii. Type your message into the message window or choose a template from the drop down above it.

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.
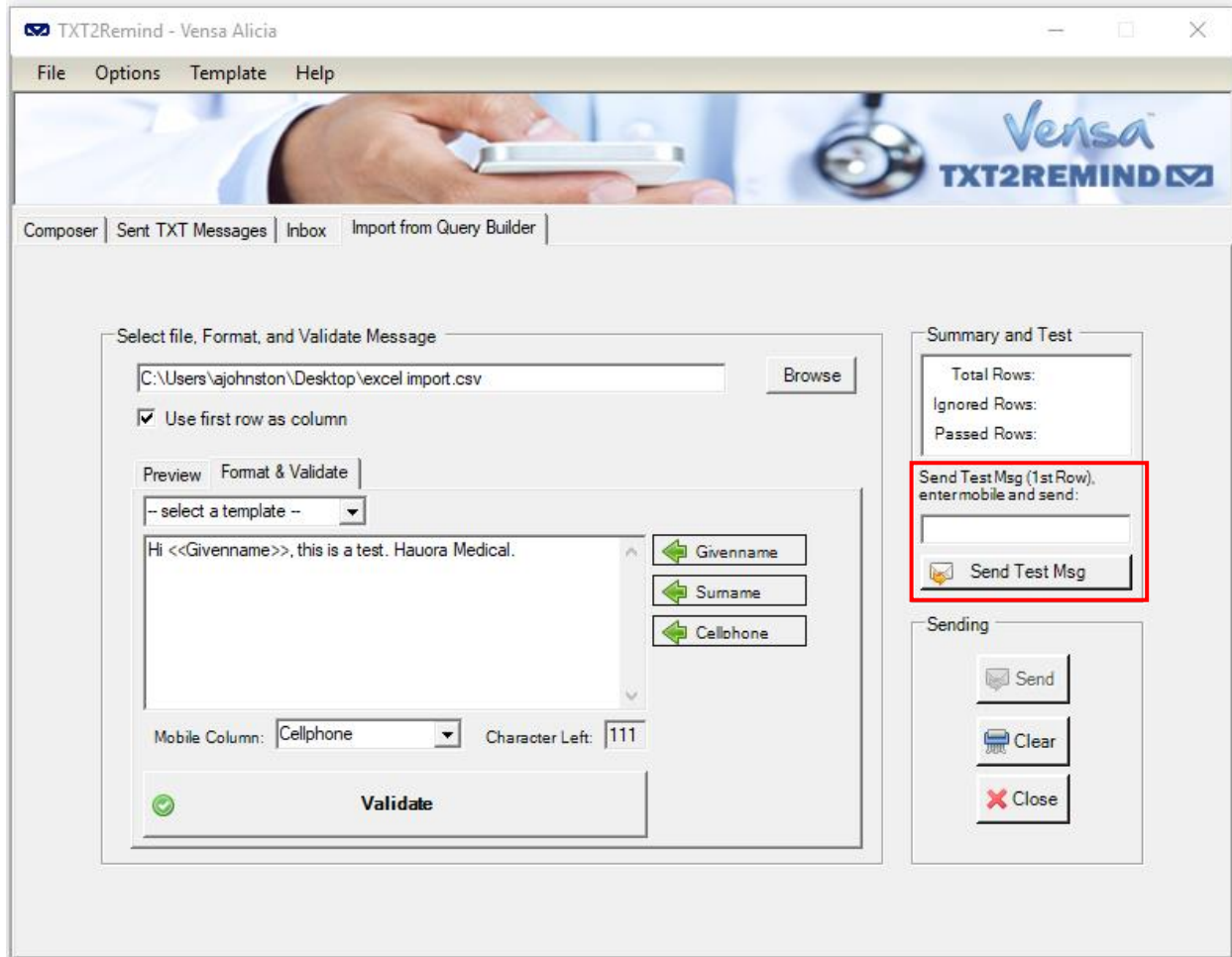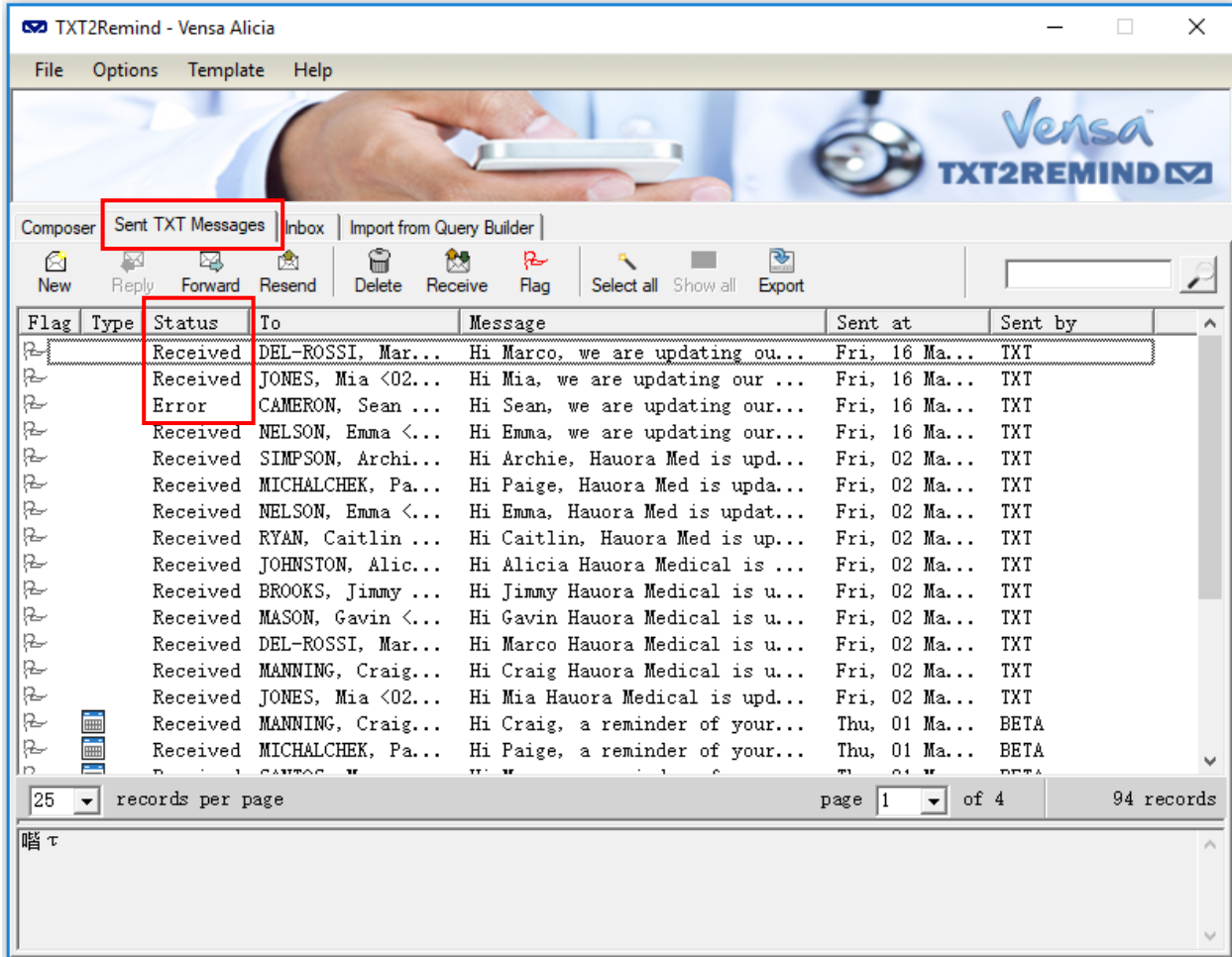

iv. Once you are happy, click the 'Send' button to send to all.

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.