texta parent.ie

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Prepared For:

All TextaParent.ie Users

TextaParent.ie User Guide

Prepared by:

IPPN
Updated October 2014

ippn
Leading and Learning

Contents

1. WEBSITE STRUCTURE

The TextaParent.ie homepage has links to all the 'content' of the website. Tutorials and all 'how to' and other information about the website are available through the menus – you don't have to log in to access these.

To access the application (to maintain contact data, purchase text units, send messages etc.), schools who already have a TextaParent account should click on the pink 'Log in' button and type in their username and password to access the application. Schools who do not already have a TextaParent.ie account will need to register using the green 'Getting Started' button or by clicking the 'Register' menu item.
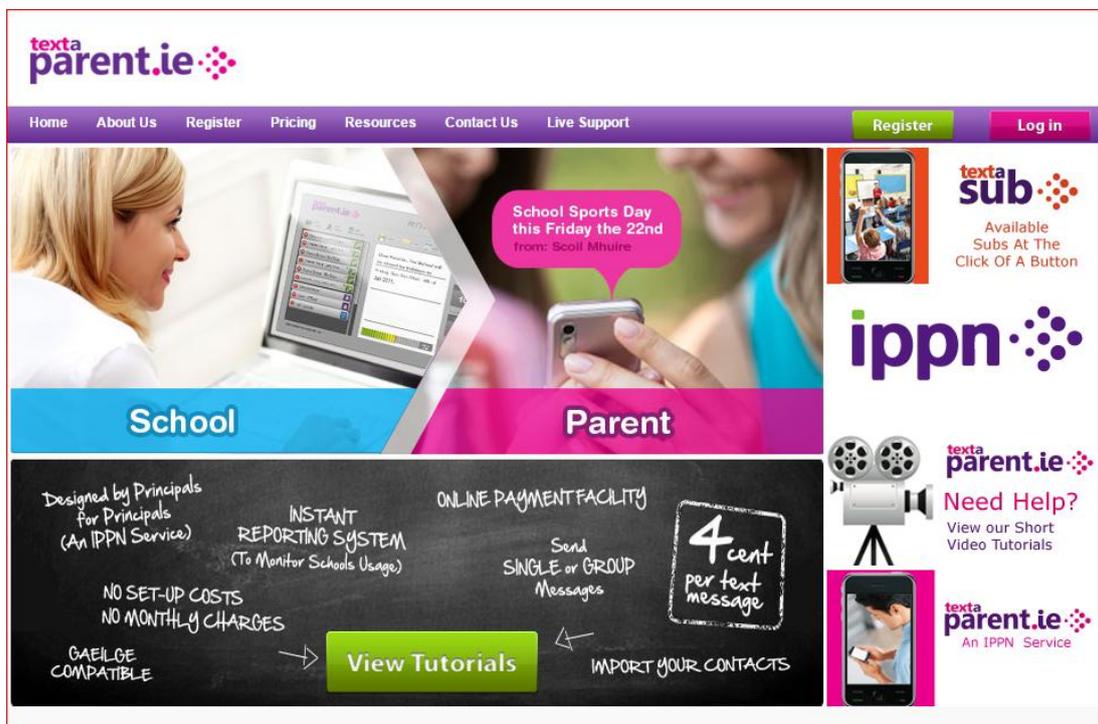
1.1 REGISTRATION

The registration form (below) includes fields to capture

- a 'School Short Name' - this will be used as the "sender ID" that appears on the recipients' mobile phones when a text message is received from the school so it needs to reflect either the school name or Principal's name.
  Note: only 11 characters can be displayed as the Sender ID.TextaParent has limited the field to 11 characters.
  Additional sender ID's can be added by going to you school profile when registration is complete.
- County – for statistical use only
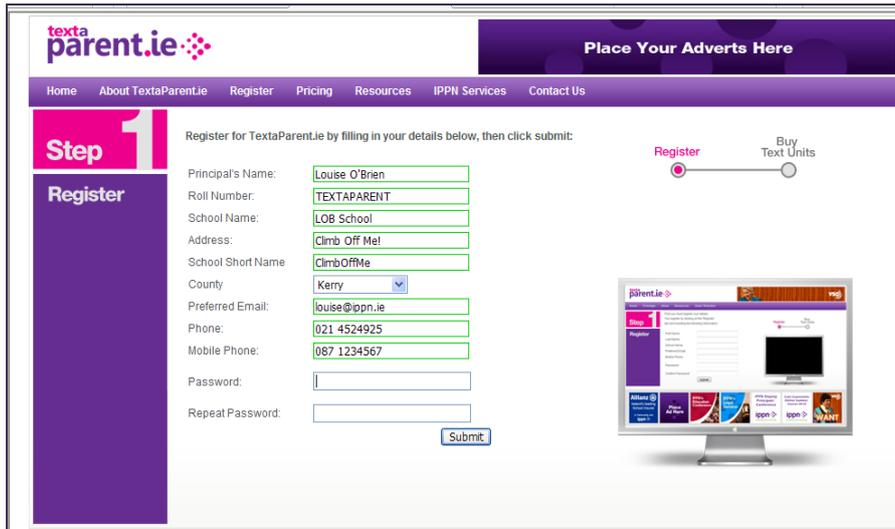
The roll number is validated against IPPN's database of schools (Salesforce)

- if the roll number exists in Salesforce and no account is already set up, success (see below)! The user is then brought to a screen which explains about organising school contact data, purchasing text units etc. User may click the 'Login' button to get into the account immediately if they wish.

- if a TextaParent.ie account already exists for the roll number, the registration will fail

- if the roll number doesn't exist on Salesforce, the user will be asked to contact the Support Office by emailing info@textaparent– it may be a brand new school that hasn't yet been set up on our system.
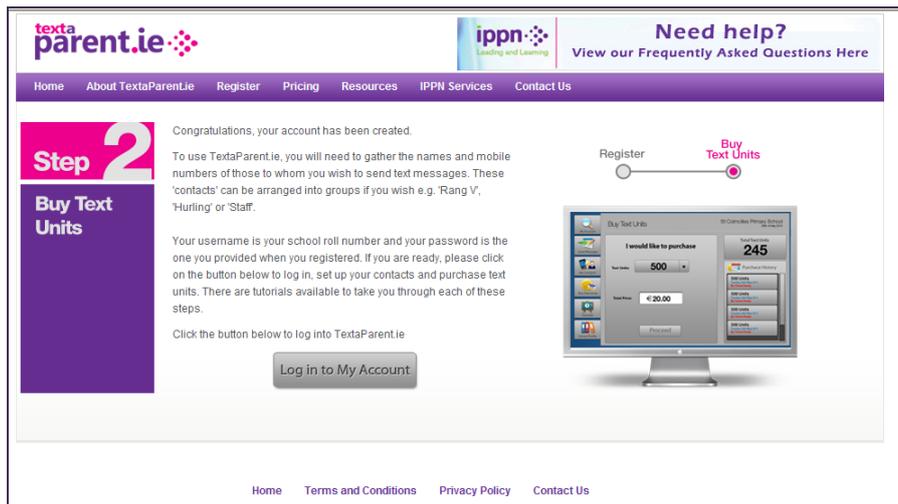
1.2 LOGIN

1. Users must click the Login button to access these fields.

2. All users log in to the school account with the school roll number and password they have used with the old TextaParent.ie website.

3. The 'Forgot Password' link is available after clicking the Login button for the same reason

4. Once users have been set up, when logging in, a list of profiles are presented and the user selects their own name from the list to get into the site. To bring up the list, click on the arrow next to the first name presented.

A screen similar to the one below will be displayed. Scroll to the relevant username, select it and click OK.
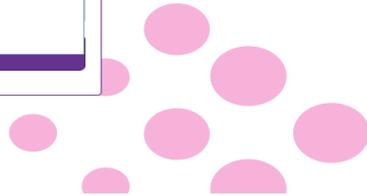
5. Only the profile with (P) requires a password. All other profiles can leave the password area blank and sign in.

1.3 ABOUT TEXTAPARENT.IE MENU

1. The 'About TextaParent.ie' webpage describes the website, the ways in which it can be used, benefits and key features

2. The article 'SMS trí mheáin na Gaeilge' explains the limitations imposed in relation to non-standard characters, including fadas and the € symbol

3. Includes links to
   a. Privacy Policy
   b. Terms & Conditions of using the website.

1.4 PRICING

This page provides a description of the pricing of text units and how to calculate how many units the school might need. Also describes the payment options available:

- Online via credit card and Visa debit card
- Cheque payment.

1.1.1. First Login with TextaParent.ie

This webpage provides some information about using the website for the first time as well as a link to a 'readiness checklist' (below). These will also be presented via a link in a popup window when the school first logs in to the site. You can print off the checklist and go through the steps, ticking each step off as you complete it (or click past it and come back to it later if you are just browsing).

1.1.2.   Checklist for Readiness to send via TextaParent.ie

How to use this Checklist

We suggest that you print and then review the suggestions below, and tick each suggestion as you complete it. Following this list will help you get the most out of TextaParent.ie.

|	
Passwords	
• Ensure you have written down (or emailed yourself) a copy of the school's TextaParent.ie account password for logging in. Please note that there is now a 'forgot password' facility to retrieve it - you will need to know the email address of the account for this to work. • Principals, please ensure that you have written down (or emailed yourself) your *separate* Principal's password which is needed for some key functions. It is <u>strongly</u> recommended that you do not share this password with anyone.	☐ ☐
User Information	
• If people in the school community other than the Principal will need to access TextaParent.ie to maintain information and/or send text messages, it is important to set them up as 'users' of TextaParent in their own right. • Note: all users set up within the account access the same text units, contact information and reports. It simply provides a means of tracking who is using the system and sending texts etc. • Users you may wish to consider setting up include the school secretary, the BoM chairperson and teachers who have used TextaParent.ie in the past on school-related business. • To set up and maintain user information, go to **School Profile**.	
School Information	
• Update your school information in TextaParent.ie. Because your information was migrated from the old TextaParent, which had little school information, you will need to fill this in. • ****NB**** Update your school's 'ShortName'. This is the text used as signature to every Text Message you/your staff send. This has been set to the first 11 characters of your school name (eg 'Scoil Naisi' is the first 11 characters of 'Scoil Náisiúnta Naomh Padraig') – so change this to something recognisable to parents (eg SN Padraig), additional Senders can be added in 'School Profile' • Set your desired 'Low Unit Warning' level. This is the number of credits at which you will get a reminder to top up your credits. • To set up and maintain school information, go to **School Profile**.	☐ ☐ ☐
Contacts, Groups & Data Management	
• Although your contacts and groups have been migrated for you, please review your data before sending. • You may have lists of contacts in Excel, Calc or MS Word etc. As the new TextaParent.ie enables you to have names also, you might consider Copy and Pasting the contacts or uploading a 'CSV file' which contains both names and numbers. There are 2 video tutorials on TextaParent.ie in the Resources/Tutorials menu that take you through how this is done step by step. Essentially this involves ▪ organising your contact information in advance, ▪ grouping them into logical groups, ▪ sorting the data into two columns – name and phone number ▪ ensuring the format is correct ○ To set up and maintain contacts and groups, go to **My Contacts**. The number of contacts within a group is now displayed next to the group name. To view this, go to the *Group* tab within the 'My Contacts' screen **Export to Excel** If you would like to 'export' your contact information to Excel (i.e. save it in an Excel spreadsheet), that facility is now available. To access it, select 'My Contacts'. The 'Export ' button is available both on the *Individual Contacts* tab and the *Groups* tab.	☐ ☐

1.1.3. Frequently Asked Questions

In a Q&A format, this list of Frequently-Asked Questions (FAQs) answers the questions that have already been asked by schools in relation to the new website. This page will be kept up to date to reflect changes in functionality.
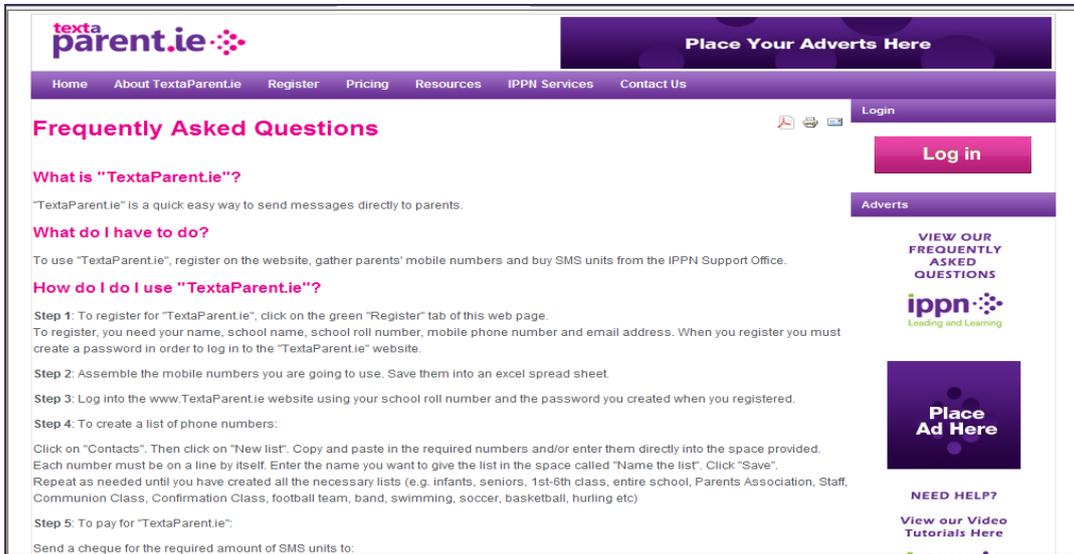
1.1.4. How-To Video Tutorials

Provides links to online video tutorials as well as tutorials that are downloadable to 'smart' mobile phones.
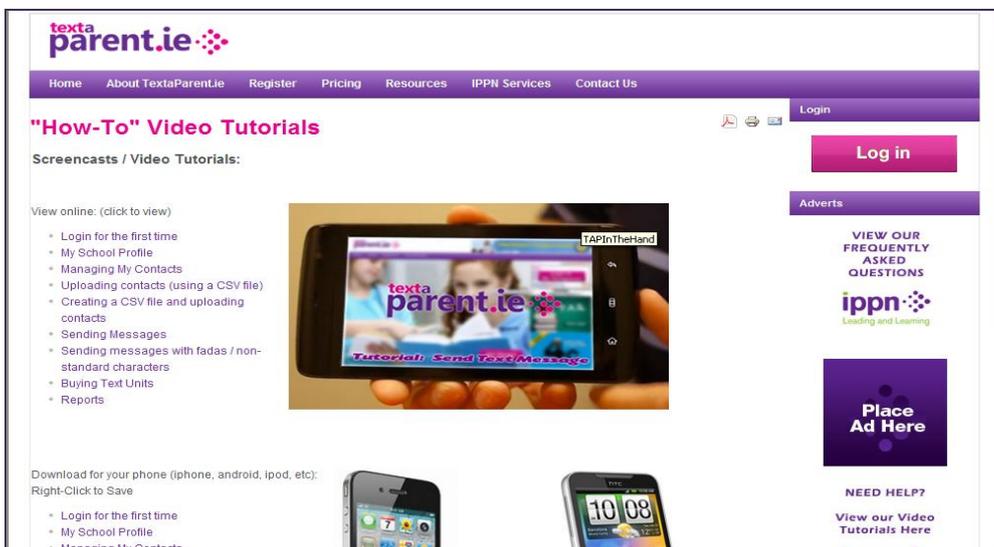
1.1.5.   Letter to Parents

Provides a link to a template letter than can be sent to parents to gather their up-to-date mobile phone numbers. The letter can be modified by the school as required.

1.1.6.   User Information

This webpage provides further information on:

1. Contact names and numbers – do we have to maintain names?
2. Groups and contacts – check before sending
3. Uploading contacts via CSV files
    - Groups and contacts already exist
    - Difficulty with data formatting
    - Difficulty saving an Excel file as a CSV
4. The use of fadas in TextaParent.ie – 160 vs. 70 character limit
5. The school does not have a credit card – can we still buy text units by cheque?
6. Do we need a PayPal account to buy text units?

IPPN SERVICES

This webpage provides links to IPPN's other websites

- ippn.ie
- EducationOpinion.ie
- EducationPosts.ie
- Learning+

CONTACT US

This menu provides two links
- A simple feedback form for queries that will be directed to IPPN Support Office staff
- A webpage with a link to a dedicated email address for commercial advertising queries.

2. NAVIGATION

Once logged in to the TextaParent application, you should use the tabs on the top of the screen to navigate around the various functions.

The first screen that will appear is the 'Send Message' screen.

3. SEND MESSAGE

This is where you can
- Set up a message
- Use a template to create a message then edit it
- Save a message as a template to use again
- Schedule a message to be sent at a later time/date
- View scheduled messages.
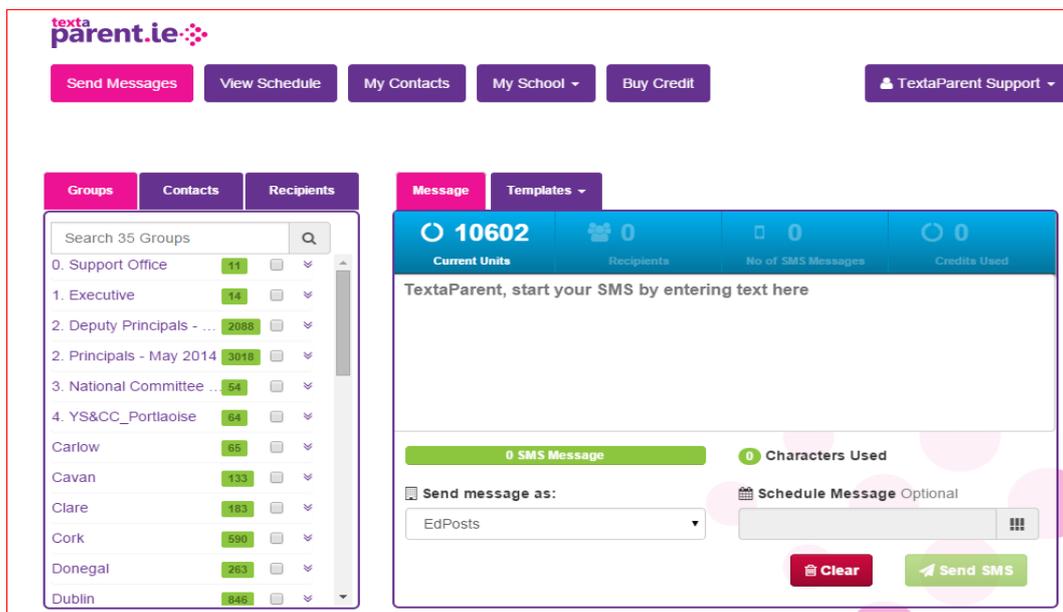
Recipients can be added in a number of ways.
1. To select a group or groups just tick the box next to the group names.

2. To include a one off single phone number for which there are no contacts set up previously, and you do not wish to keep - click **Quick Add Number** and type in the number (and the name if required). This is available on the recipient tab.
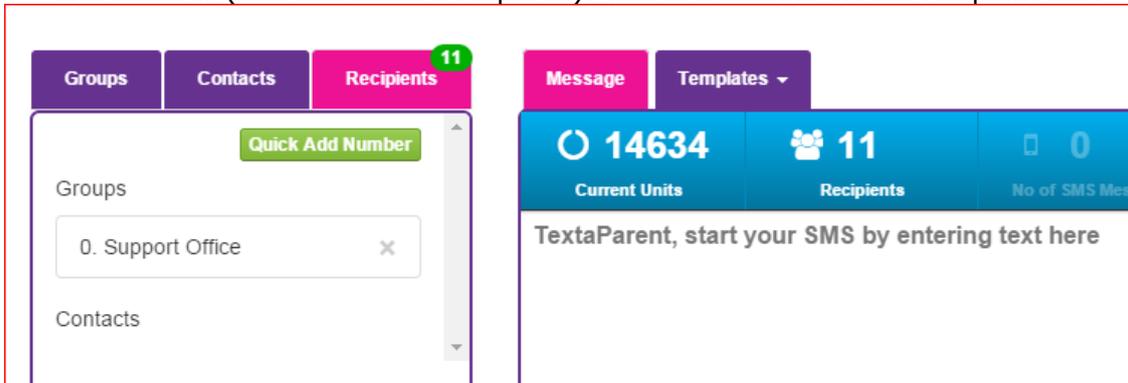
3. If the contact details are already set up in individual contacts or in groups, these can be selected by clicking on the arrow for the group or searching in the contacts tab.
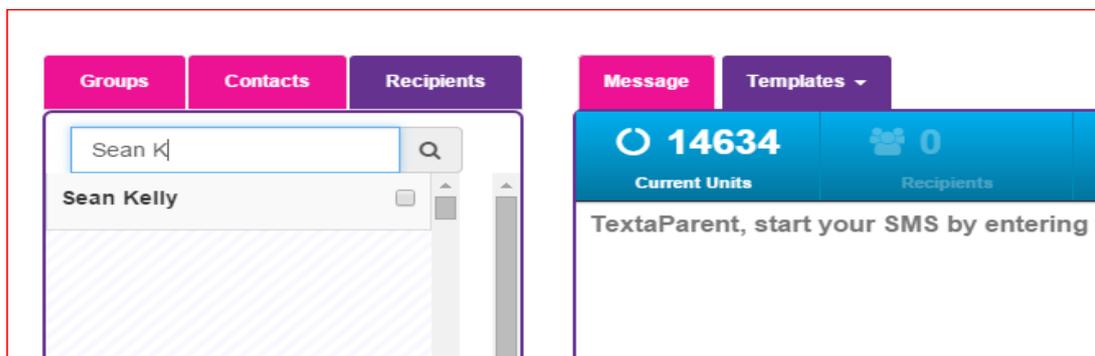

COUNTERS
The three counters on the top of the message box are updated as the user types the message to tell the user
1. The current credit balance
2. Number of recipients selected to receive the message
3. Number of SMS messages used
4. how many text units will be required to send the message

Note: The colour bar beneath the Message changes colour as the number of characters increases towards the next text unit.

NON-STANDARD CHARACTERS
If you include any non-standard character (including fadas, €) in your text message you will have 70 characters per text unit per recipient available. If not, you will have 160 characters per text unit per recipient. You can send a longer text message but this will use more text units per recipient.
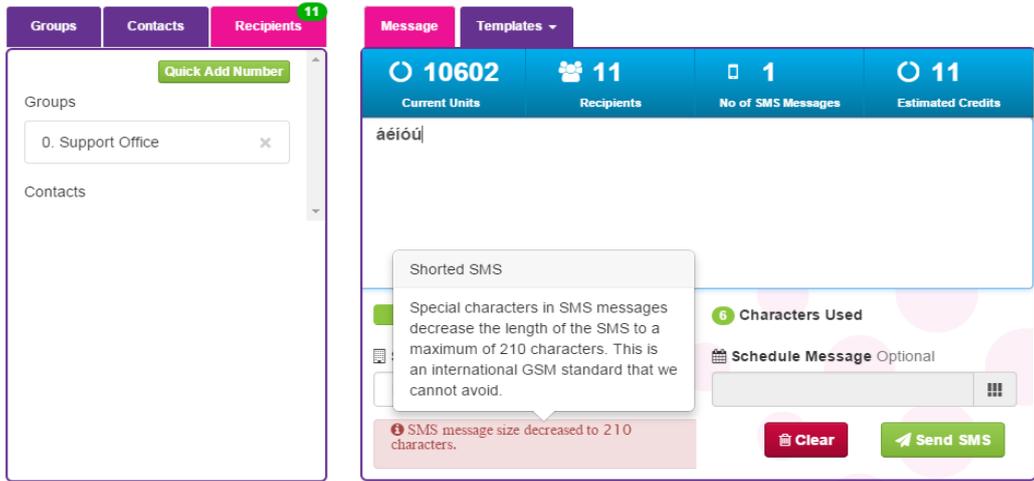
SCHEDULE A MESSAGE

To schedule a message, the recipients and the text of the message need to have been completed. Then click the **Schedule** button and select the date and time.
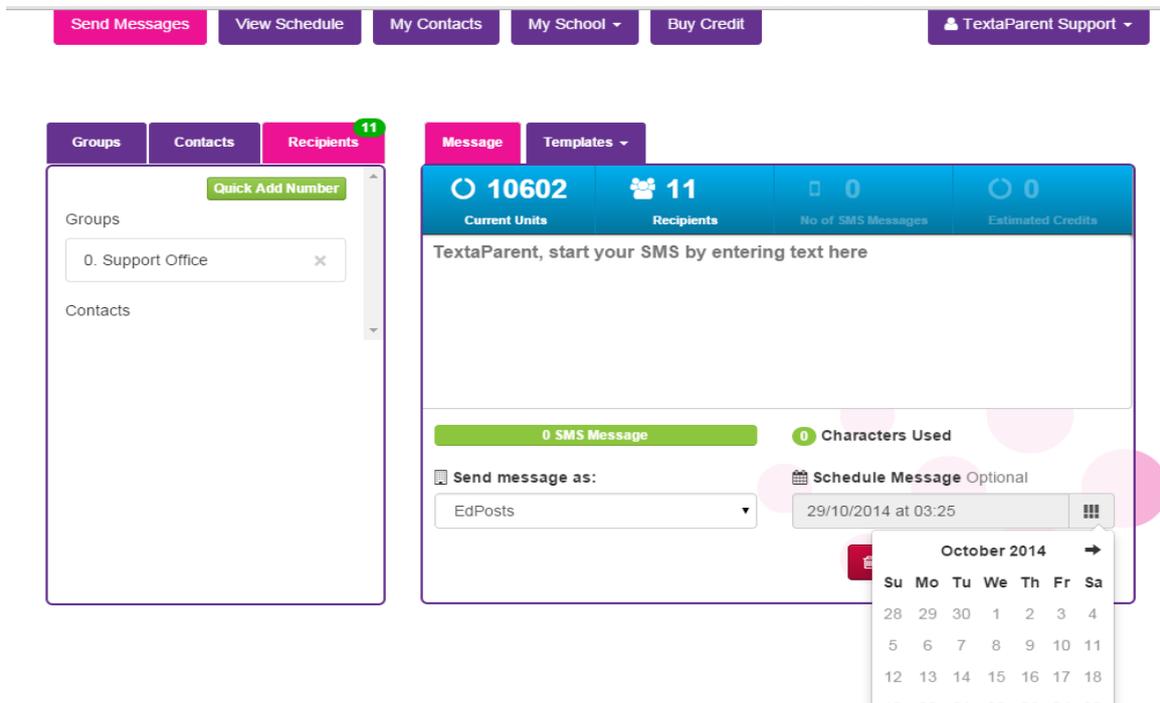
You can view you all of your scheduled messages through a calendar view by clicking View Schedule button on the top menu tabs.

SAVE TEMPLATE

If you send similar text messages regularly, to save time you can create a 'template' text message that you can review, amend and send later. To do this, type the message, click **Templates – Create a template from this SMS**.
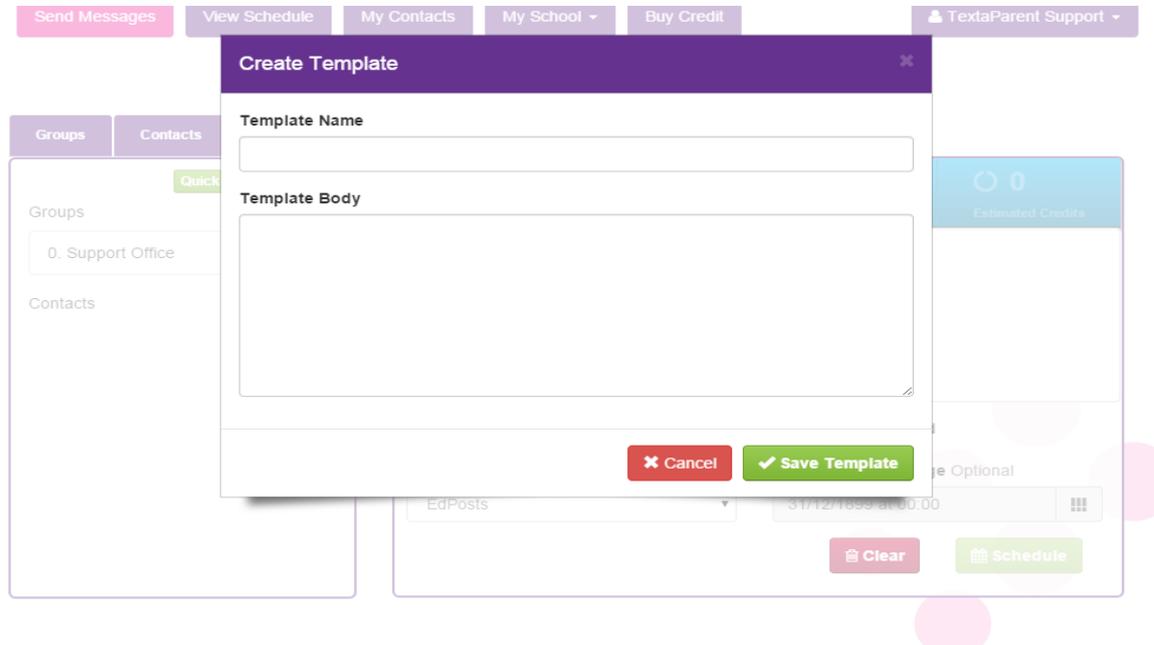
4. SCHOOL PROFILE

Note: Only the user set up with role = 'Principal' can change the school profile details – school and user account information and the low text unit warning threshold. All other users can view the data but will not be able to edit it.

Update your email address and mobile number.

5. MANAGE SENDERS

A 'Sender' is the name that appears on recipients' mobile phones when they receive a text from the school.

To set up additional Senders or delete existing Senders:

Click on the user name on the top right of your screen and choose the 'Manage senders' option. Sender Id's cannot contain any space, apostrophe or commas, e.g ScoilMhuire

6. MANAGE USERS

You can add edit or delete profiles from this page. You can also set the admin (P) status to a particular profile.

7. CREDIT THRESHOLD – AUTO TOP UP

To help schools who do not have credit card facilities we have added an Auto Top up service to Textaparent.ie. You can request that your account is automatically toped up by a preset amount when your balance goes below a preset threshold.

Go to Credit Threshold and then to AUTO TOP UP. You will be approved for two auto top up amounts, and invoiced once credit has been added. Once payment is received for both invoices your Auto Top Up will be reactivated.

8. BUY TEXT UNITS

Schools now have the option to top up their TextaParent.ie account online by paying through PayPal. When paying online, users can either
1. process an individual transaction and provide credit card (or Visa debit card) information or
2. you can opt to set up or use a PayPal account and the details will be passed to TextaParent.ie without the user needing to type it out each time.

IPPN will continue to accept cheques.
You buy text units in €25/500 text unit increments up to a maximum of 10,000 units (€500) in one transaction.

Click on the 'Buy Credit' button on the menu, choose the amount of credit you wish to purchased and proceed to the PayPal checkout.

Purchase SMS Units   ✕

Top Up your account by selecting the amount of credit you need and press the check out button to be taken to PayPal for payment processing.

Top Up Amount   Select Number of Units ▾

PayPal   All your purchases are protected by PayPal. We never store your credit card details. You can read about how PaylPal works or our Privacy Policy. 🔒 Your Connection Is *Encryped*.

🅿 Secure Checkout With PayPal

Of course, if you have waited several minutes and nothing happens, close the window, log out of TextaParent and log in again and retry – it may be that your broadband connection temporarily stalled and affected the process.

9. MY CONTACTS

All of your school's TextaParent.ie data (your roll number and password as well as groups and contacts) was taken from the old TextaParent.ie, and entered into the new TextaParent.ie on the morning of 24th October 2014. This contact information is available to use now and you can send to your groups and contacts with no further work.

Please ensure that you check your groups and contact numbers before sending text messages.

Each group will show the number of contacts allocated
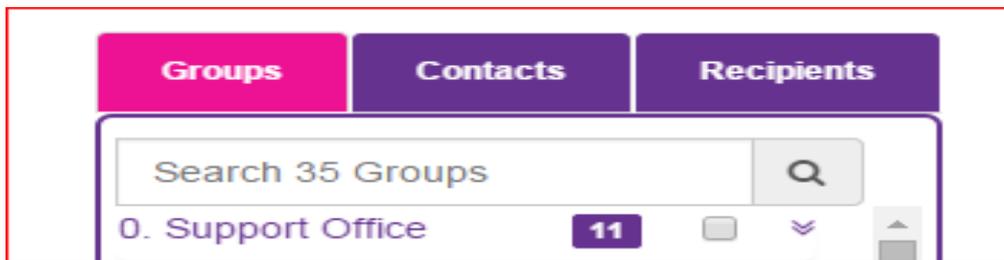
9.1 ADDING A NEW CONTACT

To add a new contact go to;

- ❖ My Contacts and then to Individual Contacts
- ❖ Click on the New button add the new contact

To add this contact to an existing group go to;

In the system, a contact is maintained as shown below – the number has no leading zeroes or spaces so mobile phone number 087 1234567 is typed in as 871234567. The international dialling code is automatically included.
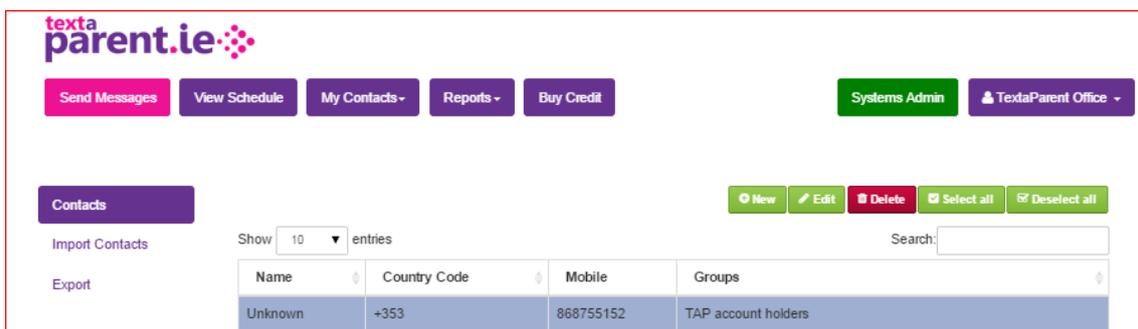
To assign your contacts to your groups click on My Contacts – Contact Groups.
a. Select the group that you wish to add your contacts to.
b. Two windows will appear, one with available contacts and one with your group contacts.
c. To bring an individual contact into your selected group, click on the green +.
d. To remove a group member select from the left window and click the red-

9.2 COPY AND PASTE

To upload a list from Excel;

- ❖ Your excel document should have only two columns of data – Column **A** will hold the name and Column **B** will hold the mobile number.
- ❖ The mobile number should not contain any spaces, dashes etc.
- ❖ In Textaparent click on the group that you wish to add the list of contacts to.
- ❖ Click on the import button.
- ❖ Copy both column A and B from your excel document (there cannot be any empty cells in the copied data)
- ❖ Paste into the area provided and click Preview.
- ❖ If all data copies correctly you can proceed to save to group.

Open your Excel file and select the name and number column you wish to import. Press CTRL-C. Click in the text area below and press CTRL-V to paste in the columns. You can then press process and a preview of the data to be inserted will appear.

Paste Data

Preview

9.3 UPLOAD FILE (USING CSV)

The website currently allows schools to upload contact information through what is known as a 'comma delimited values' or CSV file (.csv) which can be created through Excel Once you have your excel file saved as .csv you can search for by clicking on Browse for CSV file.

Group Members	Import From CSV
Import	You can import contacts into this group that you have exported from another system in **CSV** format. The CSV file must follow the format in the table below. If you are exporting contacts from Microsoft Excel, please ensure you save the document as a **Windows CSV** file. For numbers to be imported correctly from Excel, you should also set the format of the column containing the phone number to a number format that does not have decimal places.

Name	Number
John Doe	35387123456789

Browse for CSV file.

Class groups can be **renamed** to follow the class level of the group e.g. 'First Class' can be changed to 'Second Class' and any additional contacts added manually.

New contacts (e.g. parents of new Junior Infant classes) can be uploaded via Copy and Pate or CSV file into the relevant groups as described above or typed in manually if it is a small number of families.

10. MY REPORTS

10.1 MESSAGE SENDING REPORT

This report displays who sent each text message, what day/time, how many text messages were sent, how many successfully delivered, how many were not received.

Double clicking displays the list of numbers to which the message was sent. You will see you delivery stats on the top right of the screen. Each contact will display the delivery status reported back to Textaparent.ie by the provider.

10.2 PURCHASE HISTORY

This report gives a clear overview of who purchased what volume of text units and when.

10.3 ACCESS LOG

This report displays who accessed the site and when.

10.4 SUBSCRIBER DELIVER REPORT

You can enter any mobile number from you contact list and get an informed report about delivery status and messages sent. This report can be exported and printed.

10.6 ERROR REPORT

Numbers that did not get the message that was sent. This could be for a number of reasons, such as network failure or the user subscriber has had their mobile account deactivated. Where possible we provide details that the network provider passed onto us about this number when they tried to send the message.

11. TUTORIALS

There is a tutorial available for most website features including
1. Buy Text Units
2. Create/Upload Contacts
3. First time login
4. My Contacts
5. Reports
6. School Profile
7. Send Message
8. Send Message with Fadas
9. Upload Contacts

The tutorial automatically starts when selected. They run for between 2 and 7 minutes.

12.LOGOUT

The logout button can be accessed from the admin area, by click on the name at the top right of the screen.

Closing the browser will automatically log you out of TextaParent.ie

If you account in inactive for more than 30 minutes you will automatically be logged out..