



# Text Connect

## Quick Reference Card

### What is Text Connect?

- Text Connect is a web application that enables texting from landlines and toll-free numbers and allows:
- ▶ Users to send and receive peer-to-peer transactional text messages from a PC, tablet or smartphone
  - ▶ Synchronization of text messages and contacts across all applicable devices.
  - ▶ Customers to *opt-out* of text messages by replying **STOP** or *opt-in* again by replying **UNSTOP**.

**Note.** Text Connect is not a mass text messaging or spam text messaging application.

### First-time Login

#### Web Application (PC and Web-based tablet or smartphone):

1. Navigate to [www.textconnect.cdk.com](http://www.textconnect.cdk.com)
2. Enter the *Phone Number* and *Password* assigned to you by CDK Global and click **Log In**.



#### iOS or Android OS tablet or smartphone:

1. Download the **ZipWhip Text Messaging** application from your specific devices' Application Store.
2. Open the app and enter the *Phone Number* and *Password* assigned to you by CDK Global and Click **Log In**.

Refer to the *Mobile App* section on the next page for additional details on Mobile functionality.

### Sending a Text Message

#### Send a New Text Message:

1. Click the **New Text** button at the top of the main page.
2. Enter the *Name* (if the contact was previously entered) or *Phone Number* of the desired Contact, or select the Contact from the drop-down menu.
3. Enter the message content into the **Type a Message** field and click **Send** or press **Ctrl + Enter**.

**Note.** Once the new text is sent, the contact will appear in the contact list.



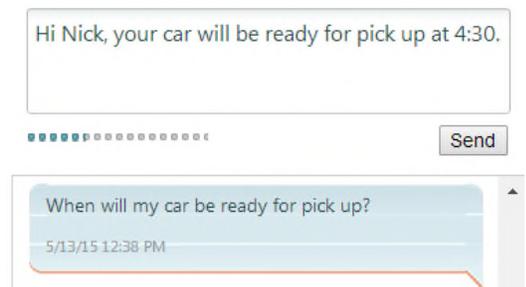
#### Reply to a Text from an Existing Contact:

The home page displays a list of your existing contacts and corresponding text conversations.

**Note.** Click on *All Conversations* to view all sent and received texts, or filter conversations by clicking on the specific contact in the contact list.

When the customer responds to a text, their message displays in a blue text bubble. To reply to a received message:

1. Click the desired contact in the contacts list.  
**Note.** Double click the contact to bring the text conversation into a pop-up window.
2. Click the **Text Message** field at the top of the displayed conversation and enter your reply.
3. Click **Send** or press **Ctrl + Enter**.



# Features and Settings

## Click the Text Connect drop-down menu to:

- ▶ Create New Contacts.
- ▶ Search and Manage existing contacts on their device(s).
- ▶ Create a Custom Signature for outgoing messages and set Notification Alerts for incoming messages.



## Create & Schedule Automatic Replies

The Auto Reply feature allows you to create and send automatic text messages when messages are received on a specific day and/or time period.

**Note:** This feature is initially turned off.

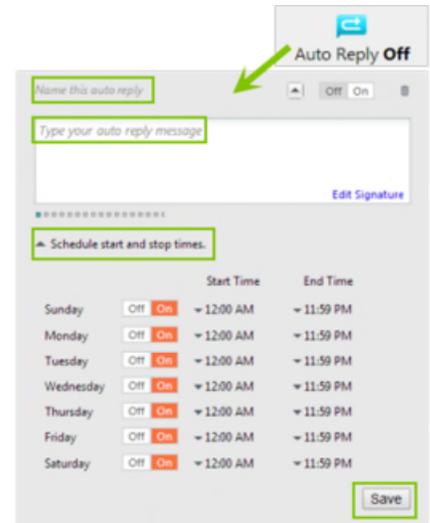
To turn auto reply on and schedule a message:

1. Click the **Auto Reply Off** button.
2. In the pop-up window, enter the following:
  - a. Auto Reply Name
  - b. Auto Reply Message

**Note:** Click on **Edit Signature** to set a signature for the automatic reply.

3. Schedule when the auto reply message will be sent by turning on specific Start and End times.
4. Click **Save** to schedule the reply.

**Result:** The Auto Reply button now shows **Auto Reply On**.



## Two Ways to Create a New Contact:

- ▶ Create a new text message (refer to the *Send a New Text Message* section above) and enter the name or phone number of the contact **or**,
- ▶ Enter the Contact information manually.

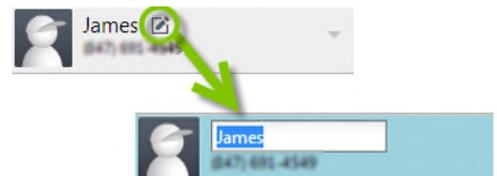
To manually create a Contact:

1. Select **New Contact** from the *Text Connect* drop-down menu.
2. Enter the Contact information into the fields provided.  
**Note:** Phone Number is a required field.
3. Click **Save and Close**.



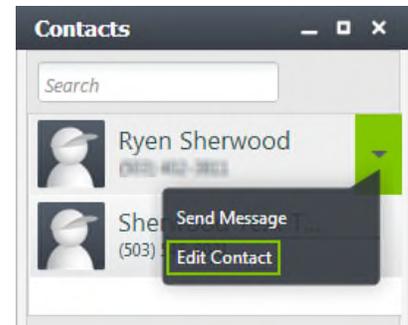
## Three Ways to Edit Contacts:

- ▶ In the displayed contact list, hover the cursor over the contact name until the edit icon appears, click the icon and enter the desired name in the contact name field that displays, **or**



# Features and Settings Cont.

- ▶ Choose **Manage Contacts** from the *Text Connect* drop-down menu to display your list of contacts in a pop-up window and click the drop-down arrow of the desired contact for a list management options **or**,



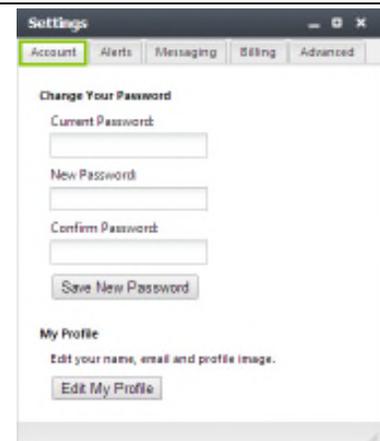
- ▶ From the Contact list, click the drop-down arrow next to the desired contact to display a list of management options.



## Manage Account Settings:

Choose **Settings** from the *CDK Global* drop-down menu to manage the:

- ▶ **Account** – change your password or edit your profile.
- ▶ **Alerts** – set alert volume and enable/disable browser notifications.
- ▶ **Messaging** – create a custom signature for outgoing messages.



## Supported Browsers & Notifications

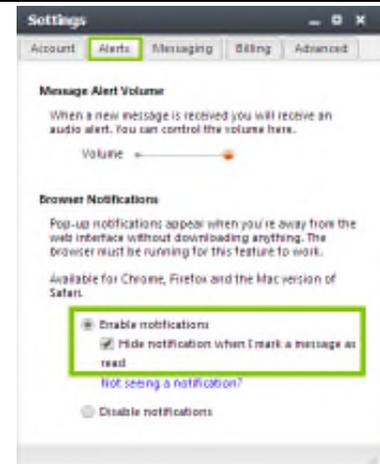
Text Connect supports the following browsers:

- ▶ **Google Chrome**
- ▶ **Firefox**
- ▶ **Internet Explorer**
- ▶ **Safari**

Depending on the browser in use, notifications will display as a:

- ▶ Flashing tab (**Internet Explorer**)
- ▶ White pop-up window (**Google Chrome** and **Firefox**).
- ▶ Pop-up that disappears in a few seconds (**Safari**)

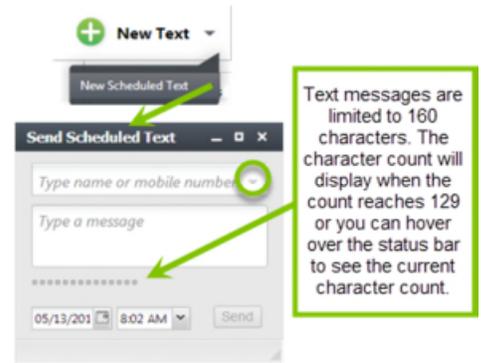
**Note.** Users must enable notifications for Google Chrome and Firefox within the Alerts tab in Settings.



## Group Account Only Features

### Schedule a future Text Message:

1. Click the drop-down arrow to the right of **New Text**.
2. Click **New Scheduled Text**.
3. Enter the *Name* (if the Contact was previously entered) or *Phone Number* of the desired Contact, or select it from the drop-down menu.
4. Enter the message content into the *Type a Message* field.
5. Select the *Date* and *Time* to send the created text message.
6. Click **Send**.

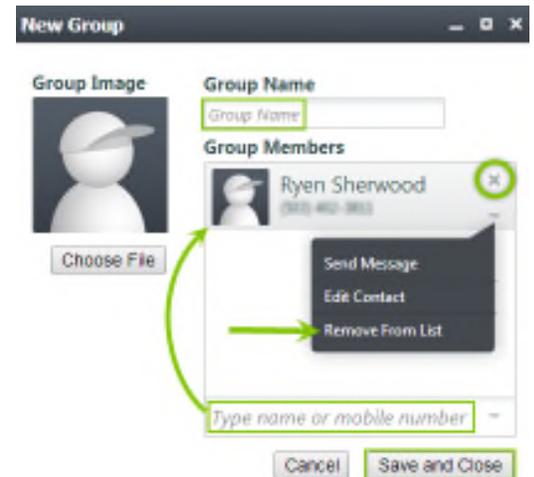


### Create a Group Contact

Group Texting allows you to send a text to up to 50 contacts at a time by creating a Group Contact and adding specific individual contacts to the group.

To create a Group Contact:

1. Select **New Group Contact** from the Text Connect drop-down menu.
2. At the pop-up window enter the Group Name.
3. Select members of the group by entering the *Name* (if the Contact was previously entered) or *Phone number* of the desired contact and press **Enter**.
4. To remove individuals from the group, click the **X** in their contact information, or click the contact drop-down arrow and choose **Remove From List**.
5. Once all contacts have been entered, click **Save and Close**.



**Note:** Once a Group has been created, it will appear in the *Contacts list*.

## Mobile App

The Mobile Application is an extension of the Web Browser version and provides users the ability to continue customer communication when they are away from their desks.

### Send a Text to an Existing Contact:

1. From the Mobile App home screen, tap the desired Contact.
2. A new screen will open to display all text history and a field to enter a text message.
3. Tap the text message field and use the keyboard to enter your text message and tap **Send**.

**Note:** Features and settings are not accessible in the Mobile Application. To access settings, log in to the Web Application.

