

Work Instruction: Managing Company Texts

1. Audience

Human Resources

2. Objective:

To keep employees informed with current announcements and information.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	09/01/2023	Original issue.	Glawe
001	02/29/2024	Updated New HR Department #	Glawe

4. Scope

Provides HR admins with ability to manage the Texting Software.

5. Prerequisites

None

6. Records

None

7. Associated Documents

None

8. Evaluative Factors

None

9. Responsibility

Human Resources

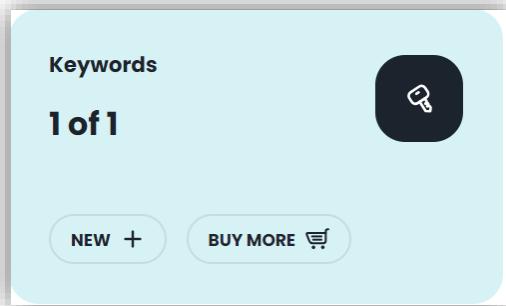
10. Instructions

- Updating the Welcome Message
- Managing Contacts

Updating the Welcome Message

From time to time, the welcome message will be updated.

1. To access and revise the welcome message, start from the dashboard and click the Keywords tile.



2. Click on the welcome message. This text is a link.

Keyword	Status	Contacts	Welcome Message
LIFTERS	✓	19	Welcome to Caldwell's Texts for alerts about company happenings! 12 Msgs ...

3. Scroll to the bottom and click on the edit function.



4. Edit the message in the message box. (You might have to scroll down again.) Verify that the message is 160 characters or less and that it will be sent in 1 message. (Each message is charged separately so if a message goes over the 160 characters, it will be charged as an additional message.)

Your Message

Welcome to Caldwell Texts for alerts about company happenings!

Characters: 160 | 1 message ?

5. Review how the message will appear in the cell phone image at the right. (Note that the number of messages/month, STOP, HELP and rate information can be edited higher up on the screen. **These parts are required for the welcome message.**

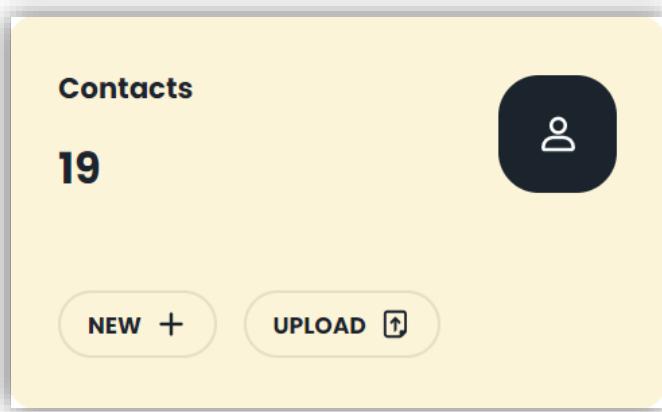


6. When everything is correct, click the Save button.



Managing Contacts

Caldwell does not add employees to the texting function. Employees must opt in from their own cell phone to participate in the texting feature. For that reason, we do not use the “New” or “Upload” buttons at the bottom of the Contacts tile. We do, however, remove terminated employees and add employee names to the numbers that have opted in. Start by clicking on the employee image on the tile.

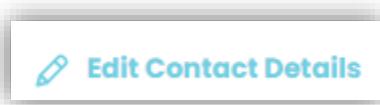


Adding Names for Opted-In Employees

1. The three numbers below are from people who opted in. Review the ADP cell phone report (excel) and search for the number listed. (Using just the last four digits will typically locate the correct person without having to enter the entire phone number. That also avoids search issues relating to format differences.)

Mobile Phone	Full Name	Keyword	Scheduled Messages	Created	
📞 (847) 975-2668	Not available	LIFTERS		Sep 01, 2023 2:40 PM	
📞 (904) 635-5002	Not available	LIFTERS		Sep 01, 2023 12:41 PM	
📞 (815) 323-8624	Not available	LIFTERS		Sep 01, 2023 12:14 PM	

2. When the employee name is located, add the name to the Textedly by clicking on the phone number.
3. Click the Edit Contact Details link to access the record.



4. Add the employee's first and last name.

Mobile Phone	Email
(847) 975-2668	Not available
First Name	Last Name
Not available	Not available

5. Then, scroll to the bottom and click Save.



Removing Terminated Employees

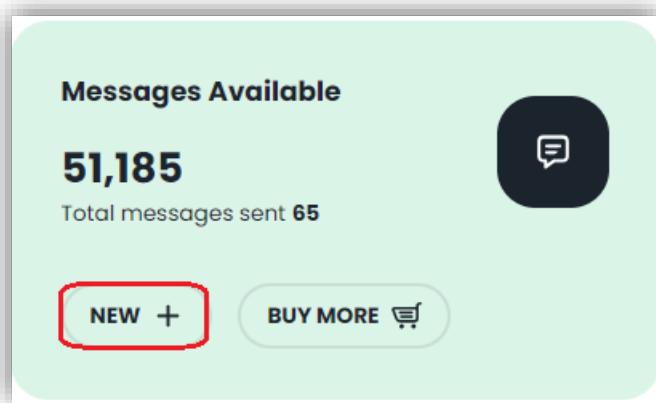
From the Contacts main page, find the record of the terminated employee. Click the trash can at the right of the record. This is used when an employee leaves the company. If they choose to opt out while still an employee, they can just text STOP.



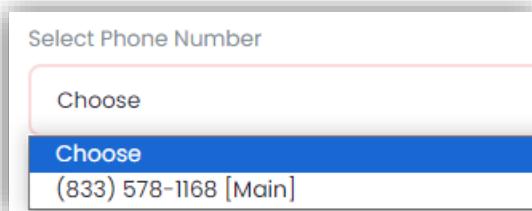
Using Messages

Creating a New Message:

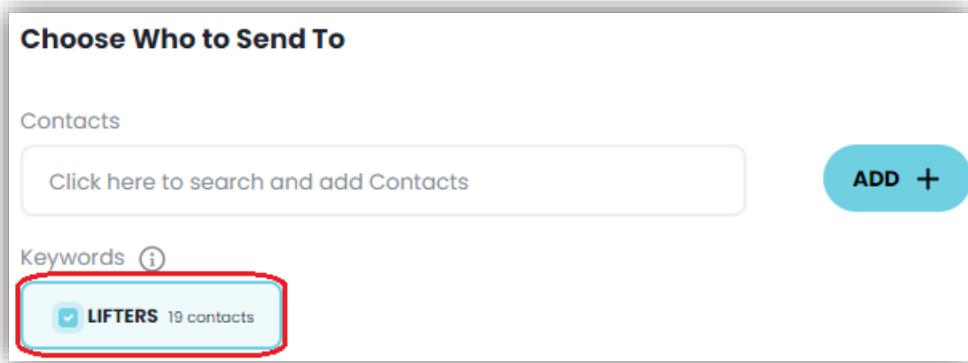
1. Use the Messages Available tile and click "New +" to create a new message.



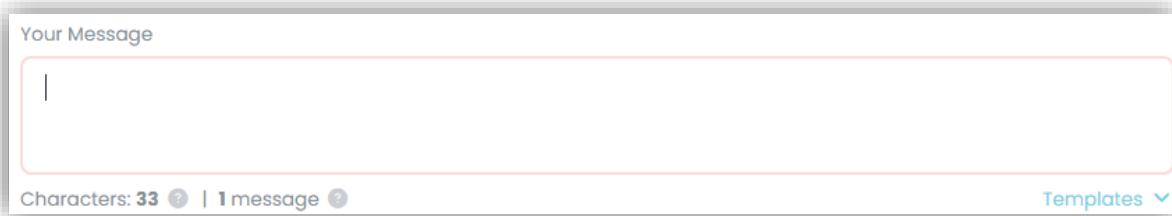
2. When the new window opens, select Caldwell's Texting phone number.



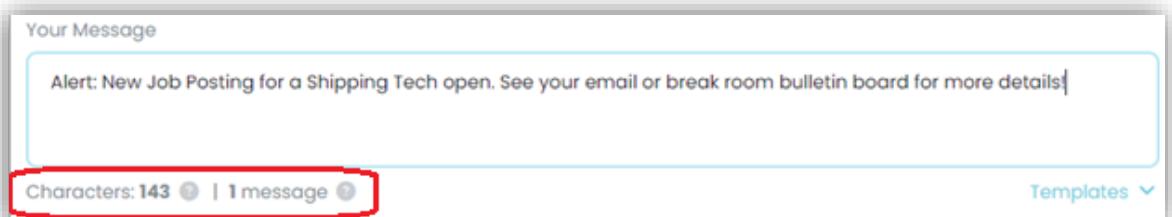
3. Next, select who the message will be sent to. If it is intended for all employees, click the "Keywords" checkbox. (All employees are opting in using that key word so this will capture all active users.)



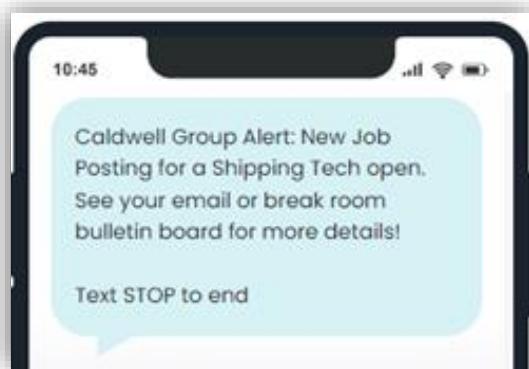
4. Scroll to the bottom and compose your message.



As you enter the text, the character and message count fields will update.

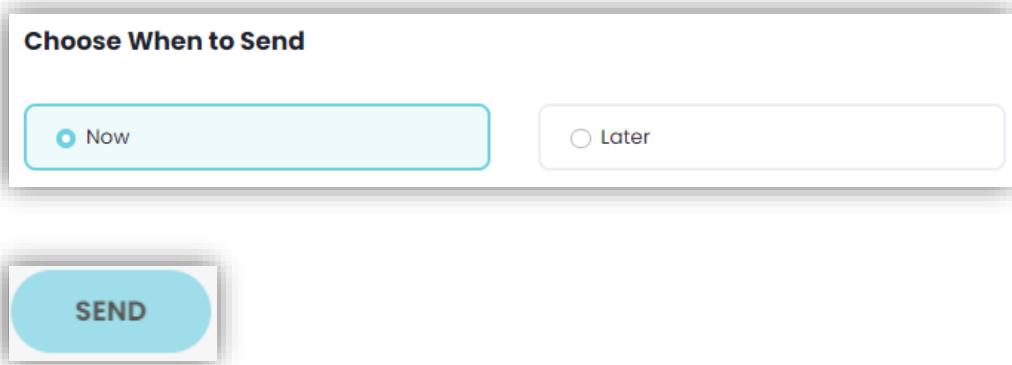


The example cell phone image will also populate to show what will be displayed.



5. The last step is to decide if the message should be sent immediately or scheduled to be sent at a later date/time.

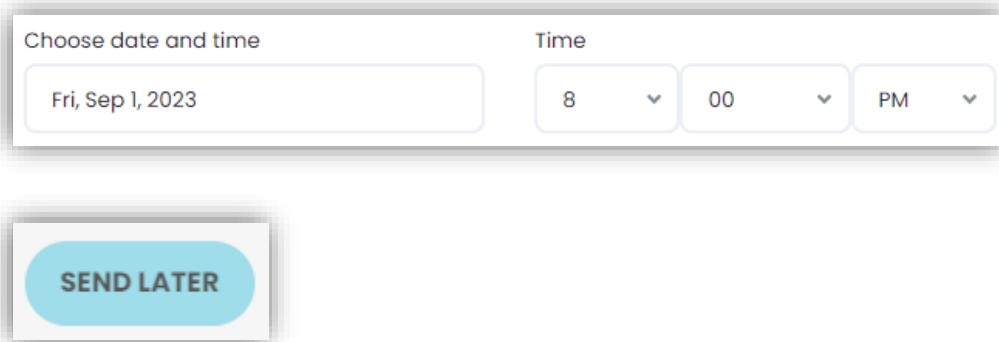
To send immediately: Click the Now button and then click Send. The message will go to all selected employees.



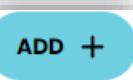
To send later: To Schedule the message to go at a later time or even a later date, select "Later" in this section.



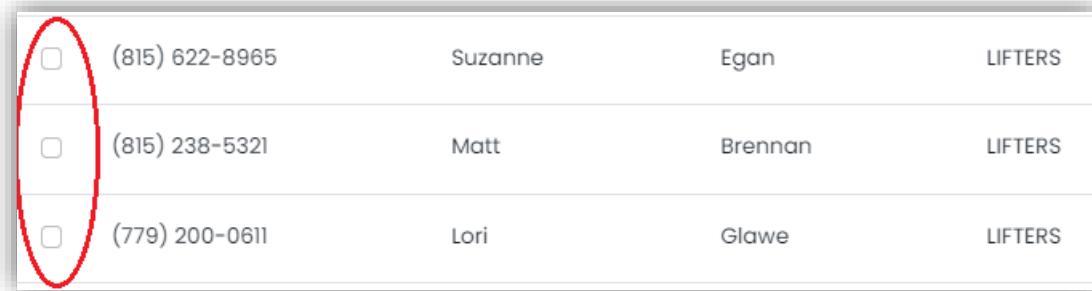
Then, use the dropdown menus to select the date and time the message is to be sent and click “Send Later.”



ALTERNATIVE CONTACT SELECTION: If the message is intended for a smaller subset of the active users, click the “Add+” button to the right of the contacts field.



When the new window opens, click the checkbox beside the individuals you want to receive the message.



<input type="checkbox"/>	(815) 622-8965	Suzanne	Egan	LIFTERS
<input type="checkbox"/>	(815) 238-5321	Matt	Brennan	LIFTERS
<input type="checkbox"/>	(779) 200-0611	Lori	Glawe	LIFTERS

Then click

