



## Text-Em-All Integration in BOLD

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### Introduction & Overview

Text-Em-All is a leading provider of simplified mass texting and automated calling solutions for staffing teams. Users can instantly deliver important job openings, interview reminders, and other alerts that a recruiting team needs to fill jobs quickly.

Text-Em-All and Avionte partnered to create an integration that gives users a quick way to initiate Text-Em-All broadcasts to talent and contacts from BOLD. The integration provides quick access to historical broadcasts through activities and helps users quickly respond to talent and contacts.

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### Integration Features

- Talent & Contact mass text & voice messaging
  - Mass text & voice message all active placements for a company
  - Mass text & voice message placements for a specific job
  - Direct access to all Text-Em-All conversations from BOLD
  - Direct access to talent and contact Text-Em-All conversations from BOLD
  - All broadcasts, text messages, and responses are logged as activities
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### Article Sections

- Integration Features by Setup
- Integration Setup
  - Marketplace Integration Enablement
  - Marketplace Integration User Login
  - Standard Text-Em-All Activity Types in BOLD
- Integration Usage
  - Locations to Initiate a Broadcast From
  - Broadcast Creation Process
  - Broadcast Activities
  - Text-Em-All Conversations
  - Text-Em-All Broadcasts Widget

## Integration Features by Setup

Integration enabled <u>but</u> logged in user is not configured for the integration	Integration enabled <u>and</u> logged in user is configured for the integration <u>with</u> a text number	Integration enabled <u>and</u> logged in user is configured for the integration <u>without</u> a text number
<ul style="list-style-type: none"> <li>• No access to the Create Text-Em-All Broadcast mass action for talent nor contacts</li> <li>• No access to the Create Text-Em-All Broadcast button on the Job screen</li> <li>• No access to the Create Text-Em-All Broadcast button on the Company screen</li> <li>• No access to the Open Text-Em-All Conversation quick action button for talent nor contacts</li> <li>• No access to the Text-Em-All Broadcast widget</li> <li>• No access to the Open Text-Em-All Conversation activity buttons for talent and contacts</li> </ul>	<ul style="list-style-type: none"> <li>• Access to the Create Text-Em-All Broadcast mass action for talent and contacts</li> <li>• Access to the Create Text-Em-All Broadcast button on the Job screen</li> <li>• Access to the Create Text-Em-All Broadcast button on the Company screen</li> <li>• Access to the Open Text-Em-All Conversation quick action button for talent and contacts</li> <li>• Access to the Open Text-Em-All Conversation activity buttons for talent and contacts</li> <li>• Ability to initiate broadcasts from BOLD and have activities logged</li> <li>• Ability to send a text message through the Text-Em-All conversation window and have activities logged</li> <li>• Text replies from contacts and talent are logged as activities</li> <li>• Access to the Text-Em-All Broadcast widget</li> <li>• Access to the Conversation Inbox button on the widget header</li> <li>• Ability to reply to talent from widget and have activities logged</li> </ul>	<ul style="list-style-type: none"> <li>• Access to the Create Text-Em-All Broadcast mass action for talent and contacts</li> <li>• Access to the Create Text-Em-All Broadcast button on the Job screen</li> <li>• Access to the Create Text-Em-All Broadcast button on the Company screen</li> <li>• Access to the Text-Em-All Broadcast widget</li> <li>• Ability to initiate broadcasts from BOLD and have activities logged</li> <li>• No access to the conversation inbox from the widget</li> <li>• No access to the reply button on the widget</li> <li>• No access to the Open Text-Em-All Conversation quick action button for talent nor contacts</li> <li>• No access to the Open Text-Em-All Conversation activity buttons for talent nor contacts</li> <li>• No access to the Reply button within the widget aside</li> <li>• No access to the Conversation Inbox button on the widget header</li> </ul>

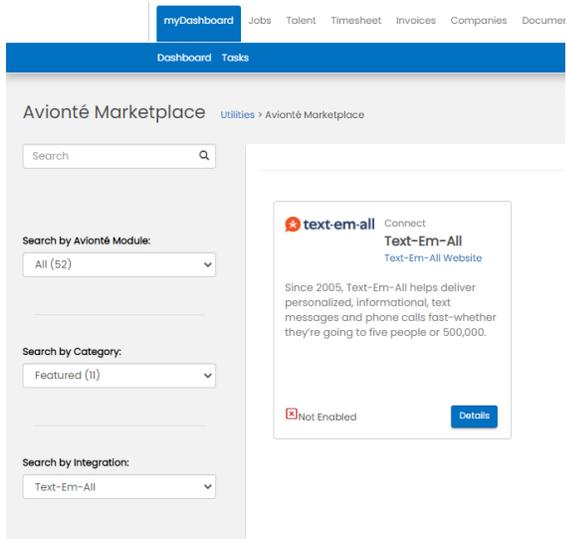
## Integration Setup

**Note:** Before integrating Avionté's software with Text-Em-All, your company must have an account with Text-Em-All. You will need your Text-Em-All Admin account credentials to enable the integration in the BOLD Marketplace.

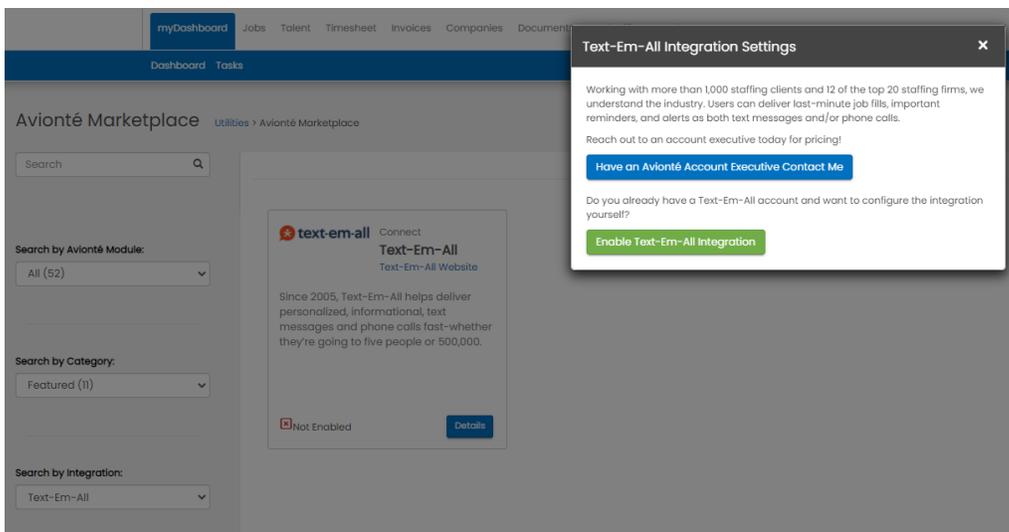
**Note:** Users who need access to the integration in BOLD will need to have Text-Em-All user account credentials as well.

## Marketplace Integration Enablement

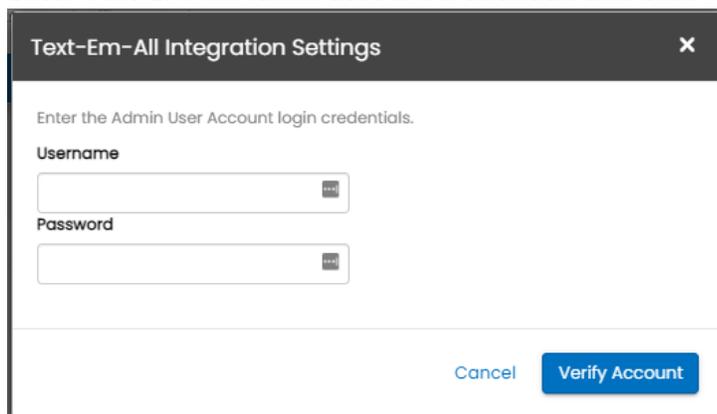
The Text-Em-All integration will initially show as Not Enabled in the Marketplace.



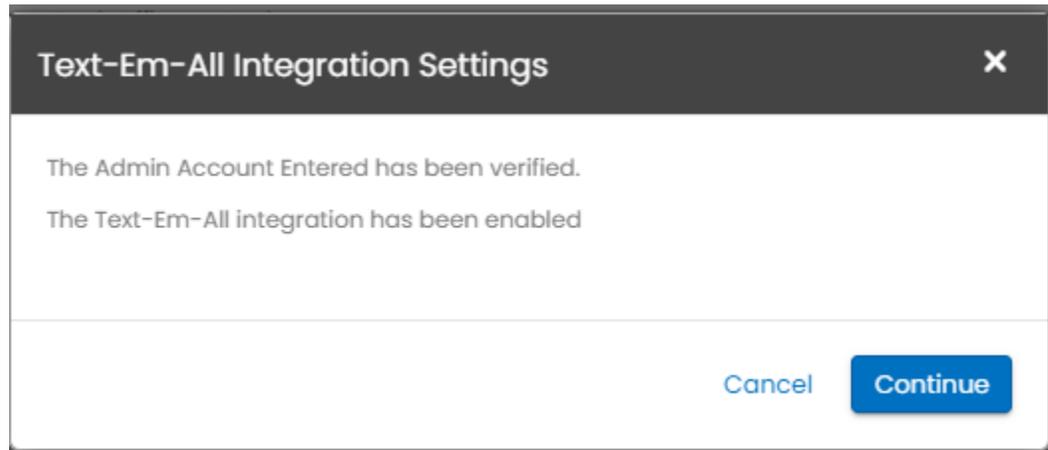
1. Click the Details button to enable the integration in the Text-Em-All Integration Settings screen
  - a. Click Enable Text-Em-All Integration



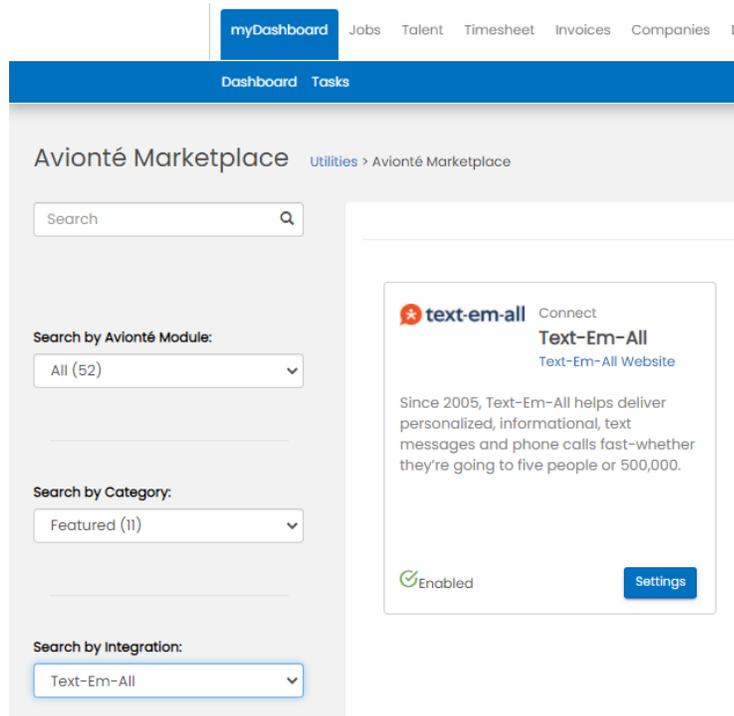
- b. Enter Text-Em-All Admin account credentials and click Verify Account



- c. If the credentials are valid, a confirmation message will be displayed. Click Continue



- d. Once you refresh your browser, the integration shows as Enabled in the Marketplace



### *Error Handling*

If invalid Text-Em-All Admin credentials are entered into the Marketplace, the user will receive an error stating the username and or password are invalid once the Verify Account button is clicked.

**Text-Em-All Integration Settings** [X]

Enter the Admin User Account login credentials.

**Username**

**Password**

The username and or password is invalid. Please re-enter and try again.

[Cancel](#) [Verify Account](#)

## Marketplace Integration User Login

**Note:** Once the integration is enabled by the Text-Em-All Admin user, additional users that need access to the integration will have to enter their Text-Em-All user account credentials in the Marketplace

1. From the Marketplace, click the Settings button on the Text-Em-All card
  - a. Enter Text-Em-All username
  - b. Enter Text-Em-All password
  - c. Click Login

myDashboard Jobs Talent Timesheet Invoices Companies Documents

Dashboard Tasks

Avionté Marketplace Utilities > Avionté Marketplace

Search

Search by Avionté Module: All (52)

Search by Category: Featured (11)

Search by Integration: Text-Em-All

**text-em-all** Connect  
**Text-Em-All**  
Text-Em-All Website

Since 2005, Text-Em-All helps deliver personalized, informational, text messages and phone calls fast—whether they're going to five people or 500,000.

Enabled [Settings](#)

**Text-Em-All Integration Settings** [X]

Enter your Text-Em-All user credentials.

**Username**

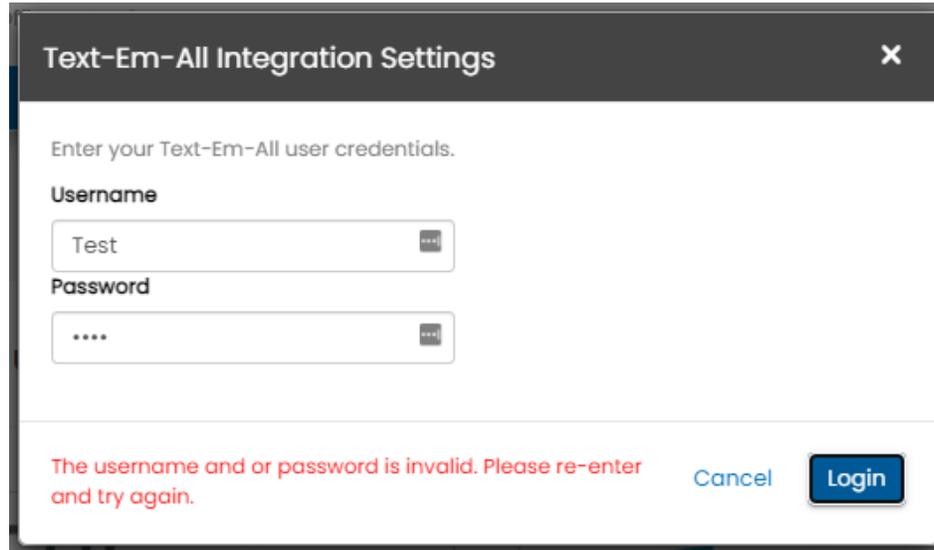
**Password**

[Cancel](#) [Login](#)

2. If the credentials are valid, a confirmation message will be displayed. Click Close.

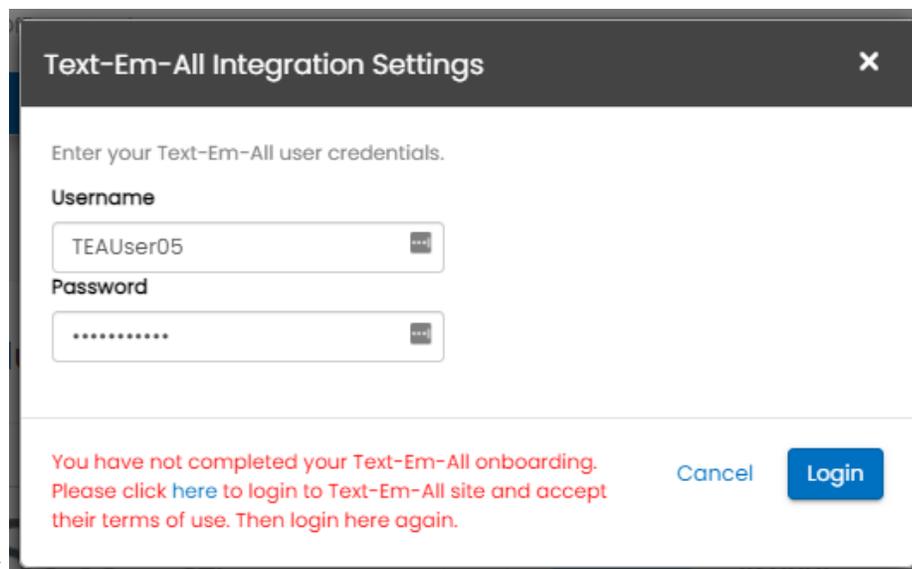
### Error Handling

- If invalid Text-Em-All user credentials are entered into the Marketplace, the user will receive an error stating the username and or password are invalid once the Login button is clicked.



The screenshot shows a dialog box titled "Text-Em-All Integration Settings" with a close button (X) in the top right corner. The main text reads "Enter your Text-Em-All user credentials." Below this, there are two input fields: "Username" containing the text "Test" and "Password" containing four asterisks. At the bottom, there is a red error message: "The username and or password is invalid. Please re-enter and try again." To the right of the error message are two buttons: "Cancel" and "Login".

- For new Text-Em-All user accounts, Text-Em-All requires that you complete their onboarding before using the integration. So if a user tries to login to the Marketplace but hasn't completed the onboarding, they will receive an error stating that must be completed before they can move forward.
  - **Note:** A link is provided within the error that directs the user to Text-Em-All's site.



The screenshot shows a dialog box titled "Text-Em-All Integration Settings" with a close button (X) in the top right corner. The main text reads "Enter your Text-Em-All user credentials." Below this, there are two input fields: "Username" containing the text "TEAUser05" and "Password" containing eight asterisks. At the bottom, there is a red error message: "You have not completed your Text-Em-All onboarding. Please click [here](#) to login to Text-Em-All site and accept their terms of use. Then login here again." To the right of the error message are two buttons: "Cancel" and "Login".

## Standard Text-Em-All Activity Types in BOLD

**Note:** Once the integration is enabled in the Marketplace, there are standard Text-Em-All activity types that automatically get added in BOLD.

**Note:** It is important that these activity types are not deleted nor renamed.

### Talent Activity Types

These can be found in Account & Settings > Utilities > Table Editor > Talent Activities & Tasks

- Text-Em-All Announcement Sent
- Text-Em-All Survey Sent
- Text-Em-All Text Received
- Text-Em-All Text Sent

**Edit Talent Activities & Tasks**

New Item:  
Enter new item here \*Required

Item Type:  
Activity

Add

Item	Type	
<input type="checkbox"/> Text-Em-All Announcement Sent	Activity	Edit
<input type="checkbox"/> Text-Em-All Survey Sent	Activity	Edit
<input type="checkbox"/> Text-Em-All Text Received	Activity	Edit
<input type="checkbox"/> Text-Em-All Text Sent	Activity	Edit

Delete Selected Items Close

### Contact Activity Types

These can be found in Account & Settings > Utilities > Table Editor > Contact Activities & Tasks

- Text-Em-All Announcement Sent
- Text-Em-All Survey Sent
- Text-Em-All Text Received
- Text-Em-All Text Sent

### Edit Contact Activities & Tasks

**New Item:**  
 \*Required

**Item Type:**

	Item	Type	
<input type="checkbox"/>	Text-Em-All Announcement Sent	Activity	<input type="button" value="Edit"/>
<input type="checkbox"/>	Text-Em-All Survey Sent	Activity	<input type="button" value="Edit"/>
<input type="checkbox"/>	Text-Em-All Text Received	Activity	<input type="button" value="Edit"/>
<input type="checkbox"/>	Text-Em-All Text Sent	Activity	<input type="button" value="Edit"/>

## Integration Usage

### Locations to Initiate a Broadcast From

- Talent > Search > Mass Actions

The screenshot shows the 'Talent Search Results' interface. At the top, there are navigation tabs: myDashboard, Jobs, Talent, Timesheet, Invoices, Companies, Documents, Back Office, and Analyze. Below the navigation is a search bar with 'Talent Terms' and a search icon. The main area displays a table of search results with columns: Preview, Pipeline, First Name, Last Name, EEO Date, Email Address, Mobile Phone, City, State, Zip Code, Latest Job, Latest Comp., Latest School, Latest Degree, Latest Field, Last Activity, Rep First Name, Rep Last Name, Flag, and Last Activity. The table contains 15 rows of candidate data. At the bottom of the table, it says 'Total Unique: 290 (Selected Items: 2)'. On the right side, a 'Mass Actions' dropdown menu is open, listing various actions such as 'Add Activities', 'Add to Tearsheet', 'Change Rep', 'Extract to Excel', 'Generate Call List', 'Create Text-Em-All Broadcast' (highlighted in pink), 'Mass Add Tags', 'Mass Onboard', 'Mass Pipeline', 'Mass Start', 'Mass Update Flag', and 'Merge Talent'.

- Contact > Search > Mass Actions

myDashboard Jobs Talent Timesheet Invoices **Companies** Documents Back Office Analyze

Search Add New Company Add New Contact

CRM Terms Type to Search... Companies Contacts

CRM Search Results Companies Found: 128 Contacts Found: 106 Flag: First Name, Last Name

Flag	First Name	Last Name	Email Address	Work Phone	Mobile Phone	Fax	City	State	Zip	Company	Title	Division	Department	Created Date	Last Update	Last Contact	Representative
✓	Contact	Inte	cont@gmail.c...	9522400634			Eagan	MN	5502	A Tester A				Apr 21, 2020			Charlie Heady
✓	ACA	Testman	acatstman...	8564235585			Minneapolis	MN	55404	ACA Test Zone				Oct 15, 2019			Note Bishop
✓	Bill	Man	billm@gmail.c...	6515286030			BLOOMINGTO...	MN	55420-2402	ACH Testing L.				Nov 20, 2020			Brad Pitt
✓	Max	Billing	reg@view.com				Eagan	MN	5502	Alex's Fine De...				Oct 2, 2020			Brad Pitt
✓	Catfish	Jones	cjones@exa...				Eagan	MN	5502	Angry Cat Fis...				Jul 18, 2019			Mandy Krohn
✓	April	Contact	apr@gconta...	6515877753			Eagan	MN	55022	Aplicert				Apr 6, 2020			Lakshmi Po...
✓	re	view	reg@view.com				Eagan	MN	55022	oatde				Nov 13, 2020			
✓	Luka	hmi	luka@hmi.co...	8741256321			Eagan	MN	55022	Auggie				Aug 13, 2020			
✓	Luke	Lyn	test@test.co...				Eagan	MN	55025	Avlante				May 15, 2020	May 15, 2020		
✓	King	Geoffrey	king@exan...				Eagan	MN	5502	Avlante Minn...				Apr 3, 2019			
✓	Sai	Bhattachar	ds4701@ggm...	6125329351			LAKEVILLE	MN	55044	Avlante Minn...				Apr 5, 2019	Apr 19, 2019		
✓	(No Name)	(No Name)					eagan	MN	5502	Avlante Minn...				Apr 12, 2019			
✓	Jason	Smith	jason.smith...				Eagan	MN	5502	Avlante Minn...				Mar 17, 2021			
✓	Mindy	Simon	mindy@exa...				Eagan	MN	55022	Batch Time S...				Nov 18, 2019			

Total Items: 108 (Selected Items: 2)

• Companies > Jobs > Placements

myDashboard Jobs Talent Timesheet Invoices **Companies** Documents Back Office Analyze

Search Add New Company Add New Contact

Requirements Contacts Documents Organization Activities **Jobs** Overview Tags POs Sales Opportunities Timesheets

PLACEMENTS - AT A GLANCE Jobs Placements

Contact 2

Create Text-Em-All Broadcast

Search Placements Currently Active

Job ID	Job	Talent	Manager	Company Office	Type	Start	End	Pay/Salary	Bill	End Reason
SB32958225	Professor	Stephanie Test	Albus Dumbledore	Defense of Dark Arts	Contract	Mar 1, 2021	Dec 31, 2023	\$25.00	\$35.00	
SB546599225	Kitchen Worker	Stephanie Test	Albus Dumbledore	Defense of Dark Arts	Contract	Mar 22, 2021	Mar 24, 2021	\$25.00	\$35.00	

Company Dashboard

Current Contract Open Job

• Jobs > Hired Details > Mass Actions

myDashboard **Jobs** Talent Timesheet Invoices Companies Documents Back Office Analyze

Search Add New Job Tier 1 Tier 2 Tier 3 Tier 4

Professor **OPEN** **NOT POSTED** Add Widget Create Clone

Hogwarts - Defense of Dark Arts, Eagan, MN  
Eagan, MN 55121

Tier 1

Job ID: SB32958225  
Job Owners: Stephanie Bauer  
Job Office: (ABC Staffing Inc.-n/a) CU Staffing office 1  
Sales Rep: Stephanie Bauer

Hired Details Search Placements All

Name	Hired Date	Start Date
Stephanie Test	Feb 25, 2021	Mar 01, 2021

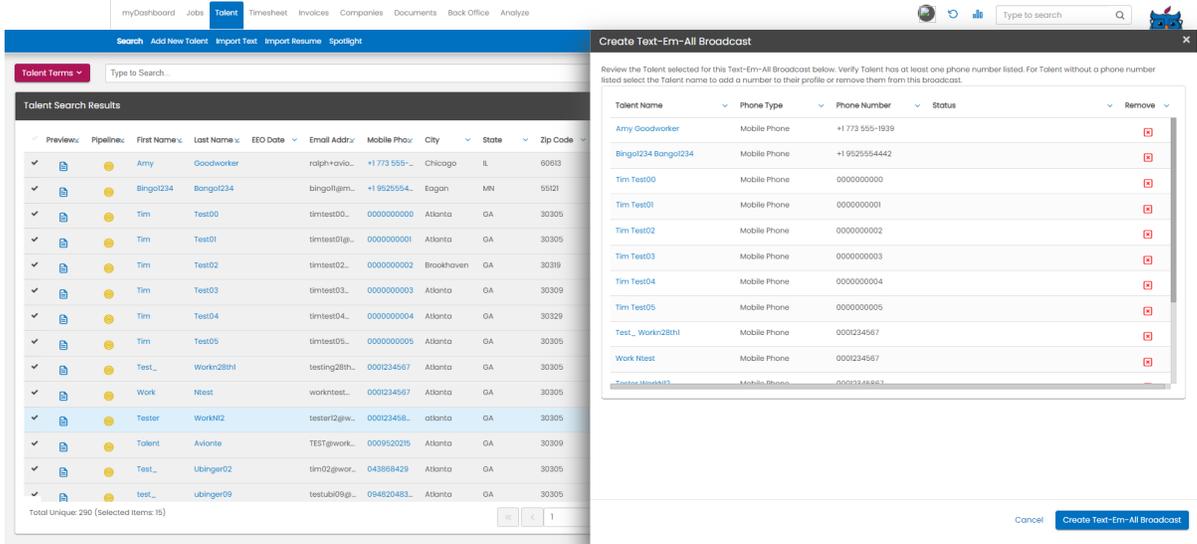
Job Notes No notes here

Client Profile Job Descriptions

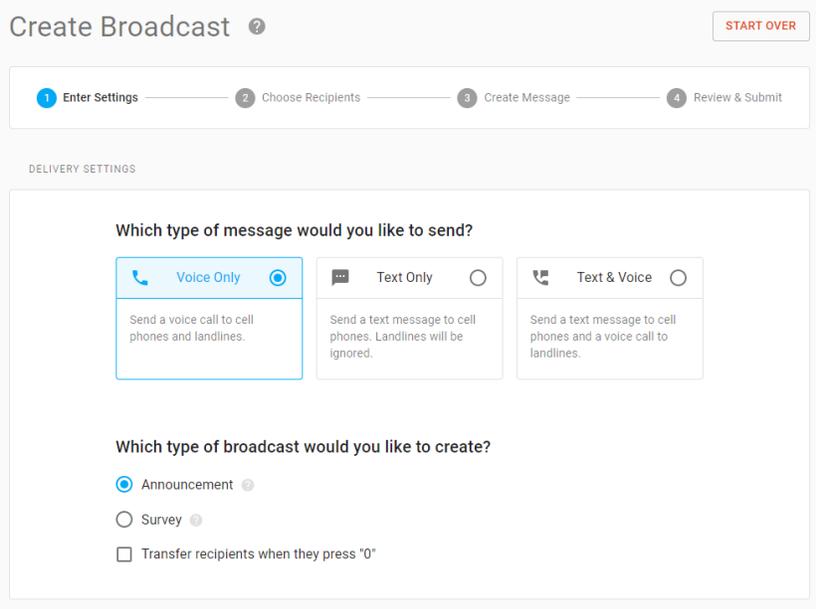
Broadcast Creation Process

**Note:** From the 4 locations listed above, when the Create Text-Em-All Broadcast button is clicked, an aside opens and lists the selected talent or contacts.

1. Use the aside to ensure each selected talent/contact have a phone number



- a. For talent/contact missing phone numbers:
    - Can click the talent/contact name to navigate to the record and update the phone number.
    - OR
    - Can remove the talent/contact from the list by clicking the Remove button
  - b. Once missing phone numbers are corrected:
    - Can close the aside and select the Create Text-Em-All Broadcast option from the Mass Action dropdown to refresh the aside
    - OR
    - Can click the Create Text-Em-All Broadcast button in the aside and the updated phone numbers will be passed through to Text-Em-All.
2. A new browser tab will open navigating you to the Text-Em-All Create Broadcast page. From here the user completes their broadcast setup.
    - a. Select the Broadcast type and completing any related Broadcast Settings



BROADCAST SETTINGS

**When would you like this broadcast to start?**

Immediately  Schedule for the future

**i** Your calls will not go out until you set up your message. You'll be able to record, upload, or select your message in the message step and review everything before you submit your broadcast.

**Broadcast Settings**

Broadcast Name

Give this broadcast a name to easily reference it later

Caller ID

(651) 236-5454

Recipients will see this number as the caller id for voice calls

**CONTINUE**

- b. This screen shows you each of the talent or contacts that had a valid number to send the broadcast to.

**Create Broadcast** **?** **START OVER**

Enter Settings —  **2 Choose Recipients** —  3 Create Message —  4 Review & Submit

RECIPIENTS SUMMARY

Total Numbers to be Texted 2 [View/Remove Recipients](#)

**BACK** **ADD CONTACTS** **CONTINUE**

- c. Create Message – the screen will differ based on the broadcast type chosen

**Create Broadcast** **?** **START OVER**

Enter Settings —  Choose Recipients —  **3 Create Message** —  4 Review & Submit

MESSAGE

Voice Message

Record new message **?**

Upload a message **?**

Select from message library **?**

**BACK** **CONTINUE**

## Create Broadcast ?

[START OVER](#)

✓ Enter Settings — ✓ Choose Recipients — 3 Create Message — 4 Review & Submit

MESSAGE

**Text Message**

Characters: 0/640 Credits Per Recipient: 0

Good morning, friends!





i Texts to new phone numbers from this Text Number will have opt-out instructions appended to them at no cost.

[BACK](#) [CONTINUE](#)

d. Review and submit the Text-Em-All Broadcast

## Create Broadcast ?

[START OVER](#)

✓ Enter Settings — ✓ Choose Recipients — ✓ Create Message — 4 Review & Submit

**Almost finished!**

Please review the info below, then click Send Broadcast.

Settings	
Name	Test
Type	Text
Text Number	(833) 416-2622
Date & Time	Send immediately

Recipients	
Total recipients	0 calls and 2 texts

Messages	
Text Message	Testing

i This broadcast will use up to 2 credits.

[BACK](#) [SEND BROADCAST](#)

e. Close Text-Em-All browser tab

- The Create Text-Em-All Broadcast aside will give you the number of talent/contacts that were successfully sent to Text-Em-All as well as the talent/contacts that did not get sent to Text-Em-All and why.

**Create Text-Em-All Broadcast**

2 Talent sent to Text-Em-All successfully to initiate a new broadcast.

13 Talent have invalid or missing information.

Review the Talent selected for this Text-Em-All Broadcast below. Verify Talent has at least one phone number listed. For Talent without a phone number listed select the Talent name to add a number to their profile or remove them from this broadcast.

Talent Name	Phone Number	Error	Remove
Tim Test02	0000000002	Invalid phone number: Primary phone	
Tim Test03	0000000003	Invalid phone number: Primary phone	
Tim Test04	0000000004	Invalid phone number: Primary phone	
Tim Test05	0000000005	Invalid phone number: Primary phone	
Test_ Workn28th1	0001234567	Invalid phone number: Primary phone	
Work Ntest	0001234567	Invalid phone number: Primary phone	
Tester WorkNI2	00012345867	Invalid phone number format. Phone number must be 10 digits: Primary ...	
Talent Avionte	0009520215	Invalid phone number: Primary phone	
Test_ Ubinger02	043868000	Invalid phone number format. Phone number must be 10 digits: Primary ...	
test_ ubinger09	09482048372	Invalid phone number format. Phone number must be 10 digits: Primary ...	
test_ ubinger04	098320983	Invalid phone number format. Phone number must be 10 digits: Primary ...	

Cancel **Resend Broadcast**

- a. For talent/contact with invalid phone numbers:
  - Can click the talent/contact name to navigate to the record and update the phone number.
  - OR**
  - Can remove the talent/contact from the list by clicking the Remove button
- b. Once missing phone numbers are corrected:
  - Can close the aside and select the Create Text-Em-All Broadcast option from the Mass Action dropdown to refresh the aside
  - OR**
  - Can click the Resend Broadcast button in the aside and the updated phone numbers will be passed through to Text-Em-All.

## Broadcast Activities

Activities will be logged for the following:

- Announcement Broadcasts
- Survey Broadcasts
- Text Broadcasts
- Text Responses

The screenshot shows a user profile for Stephanie Test. The 'Activities' tab is selected, displaying a list of recent activities:

- Text-Em-All Text Received** on Wednesday, March 31, 2021 at 10:20 PM  
Replying to text from Text-Em-All
- Text-Em-All Survey Sent** on Wednesday, March 31, 2021 at 10:15 PM  
Text-Em-All Survey
- Text-Em-All Text Sent** on Wednesday, March 31, 2021 at 10:10 PM  
Text-Em-All Text
- Text-Em-All Announcement Sent** on Wednesday, March 31, 2021 at 10:03 PM  
Text-Em-All Announcement

Navigation tabs include: Resume, Education, Work Histo..., Documents, Comments, References, Tax, Tags, EEO, Screenings, **Activities**, and Timesh...

Filters:  Talent  Job From Date To Date By the User Activity Type

## Text-Em-All Conversations

**Note:** Text-Em-All Conversations can only be accessed if the users Text-Em-All account has a text number. If account is not associated with a text number, the Open Text-Em-All Conversation buttons will be hidden in BOLD for that use.

**Note:** Text-Em-All Conversations can only be accessed if the talent/contact has a valid phone number on file.

### *Open Text-Em-All Conversation Button Locations*

- Talent/Contact > Quick Actions

**Note:** The Open Text-Em-All Conversation button allows you to quickly text message a talent/contact regardless of if they've previously been sent a Text-Em-All broadcast.

The screenshot shows a talent profile for Stephanie Test. The 'Quick Actions' sidebar on the right contains the following buttons:

- Pipeline
- Nominate
- Log Activity
- Open Text-Em-All Conversation**
- Add to Hotlist

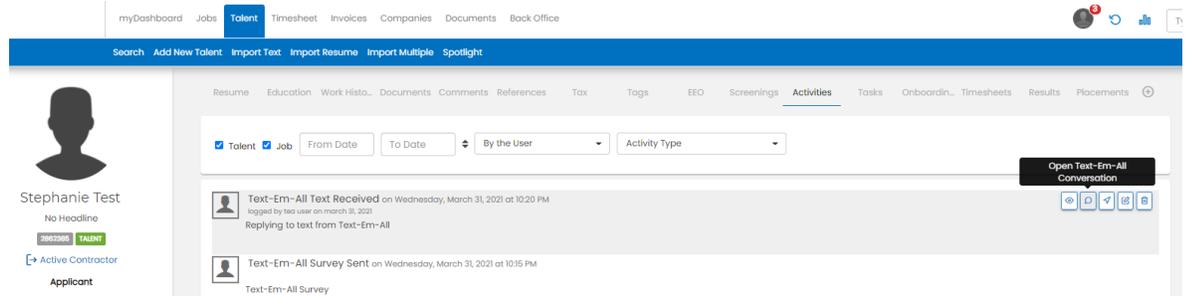
The main profile area shows the 'Resume' tab with the following information:

- Full Text Resume
- Stephanie Test
- stephanie.bauer17@gmail.com
- 123 Main Street Eagan, MN 55121

Navigation tabs include: myDashboard, Jobs, **Talent**, Timesheet, Invoices, Companies, Documents, Back Office

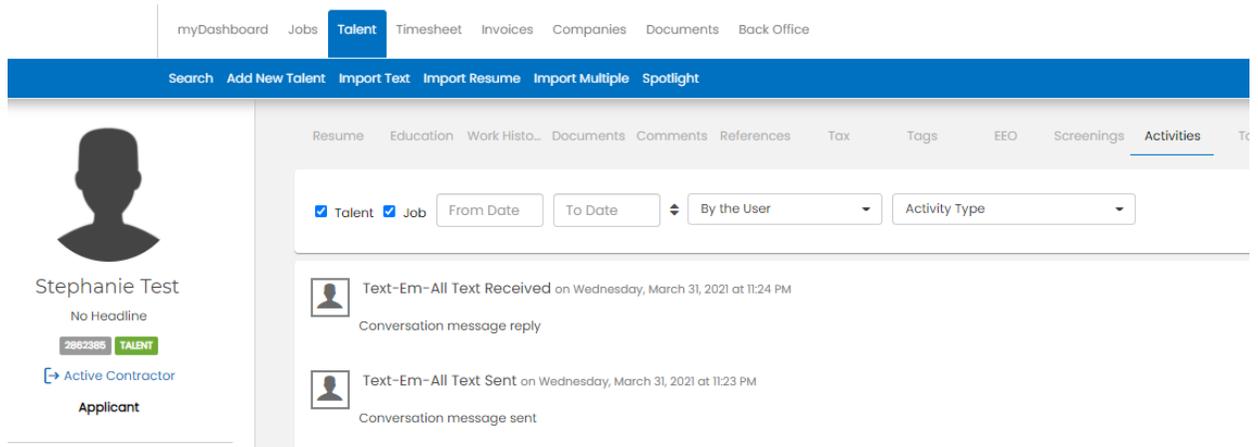
- o Talent/Contact > Activities

**Note:** The Open Text-Em-All Conversation button allows you to quickly view and the talent/contact’s text conversation on the Text-Em-All site and gives the user an easy way to text the talent/contact.

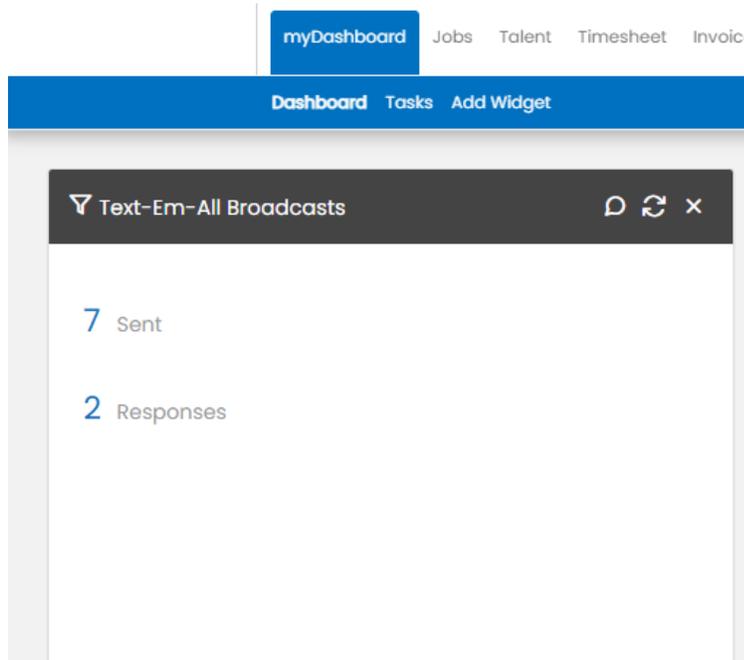


### Conversation Activities

Activities are logged for all text messages sent and received through the Text-Em-All Conversation window.



### Text-Em-All Broadcasts Widget



Open Text-Em-All Conversation button in the widget header opens up the users conversation inbox

Sent = the number of talent and contacts who were sent a Text-Em-All broadcast

Responses = the number of talent and contacts who've responded to text broadcasts

*Sent aside shows the following:*

- Employees and contacts who've been sent a broadcast
- Broadcast type
- Message
- Date Sent
- Sender
- Reply button – gives the user a way to message the talent/contact via the Text-Em-All conversation window

Name	Broadcast Type	Message	Date Sent	User	Reply
Stephanie Test	Text	Conversation message sent	Apr 1, 2021	TEA User	<a href="#">D</a>
Stephanie Test	Survey	Text-Em-All Survey	Apr 1, 2021	TEA User	<a href="#">D</a>
Stephanie Test	Text	Text-Em-All Text	Apr 1, 2021	TEA User	<a href="#">D</a>
Stephanie Test	Announcement	Text-Em-All Announcement	Apr 1, 2021	TEA User	<a href="#">D</a>
Rex Mitch	Text	Text-Em-All Test Text	Apr 1, 2021	TEA User	<a href="#">D</a>
Bingol234 Bangol234	Text	Test	Apr 1, 2021	TEA User	<a href="#">D</a>
Amy Goodworker	Text	Test	Apr 1, 2021	TEA User	<a href="#">D</a>

*Responses aside shows the following:*

- Employees and contacts who've responded to a text broadcast
- Broadcast type
- Message
- Date Sent
- Sender
- Reply button – gives the user a way to message the talent/contact via the Text-Em-All conversation window

The screenshot shows a software interface for managing text broadcasts. On the left, a sidebar titled 'Text-Em-All Broadcasts' displays a summary: '7 Sent' and '2 Responses'. On the right, a window titled 'Text-Em-All Broadcasts - Response' contains a table with the following data:

Name	Broadcast Type	Message	Date Sent	User	Reply
Stephanie Test	Text	Conversation message reply	Apr 1, 2021	TEA User	
Stephanie Test	Text	Replying to text from Text-Em-All	Apr 1, 2021	TEA User	