

Text-Em-All Integration in BOLD

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.

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

Article Sections

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

Integration Features by Setup

Integration enabled <u>but</u> logged in	Integration enabled <u>and</u> logged in	Integration enabled <u>and</u> logged in
user is not configured for the	user is configured for the	user is configured for the integration
integration	integration <u>with</u> a text number	<u>without</u> a text number
 No access to the Create Text-Em-All Broadcast mass action for talent nor contacts No access to the Create Text-Em-All Broadcast button on the Job screen No access to the Create Text-Em-All Broadcast button on the Company screen No access to the Open Text-Em-All Conversation quick action button for talent nor contacts No access to the Text-Em-All Broadcast widget No access to the Open Text-Em-All Conversation activity buttons for talent and contacts 	 Access to the Create Text-Em-All Broadcast mass action for talent and contacts Access to the Create Text-Em-All Broadcast button on the Job screen Access to the Create Text-Em-All Broadcast button on the Company screen Access to the Open Text-Em-All Conversation quick action button for talent and contacts Access to the Open Text-Em-All Conversation activity buttons for talent and contacts Ability to initiate broadcasts from BOLD and have activities logged Ability to send a text message through the Text-Em-All conversation window and have activities logged Text replies from contacts and talent are logged as activities Access to the Conversation Inbox button on the widget header Ability to reply to talent from widget and have activities logged 	 Access to the Create Text-Em-All Broadcast mass action for talent and contacts Access to the Create Text-Em-All Broadcast button on the Job screen Access to the Create Text-Em-All Broadcast button on the Company screen Access to the Text-Em-All Broadcast widget Ability to initiate broadcasts from BOLD and have activities logged No access to the conversation inbox from the widget No access to the reply button on the widget No access to the Open Text-Em-All Conversation quick action button for talent nor contacts No access to the Open Text-Em-All Conversation activity buttons for talent nor contacts No access to the Reply button within the widget aside No access to the Conversation Inbox button on the widget header

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.

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			Not Enabl	led		Details	
Search by Integration							
couron by mogration.							

Click the Details button to enable the integration in the Text-Em-All Integration Settings screen

 Click Enable Text-Em-All Integration

myDashboard Job	s Talent Timesheet Invoices Companies Doc	
Dashboard Tasks		Text-EIT-Air Integration settings
Avionté Marketplace utilities >	Avionté Marketplace	Working with more than 1,000 staffing clients and 12 of the top 20 staffing firms, we understand the industry. Users can deliver last-minute job fills, important reminders, and alerts a both text messages and/or phrace calls. Reach out to an account executive today for pricing!
Search Q		Have an Avionté Account Executive Contact Me
	Stext-em-all Connect	Do you already have a Text-Em-All account and want to configure the integration yourself?
Search by Avionté Module:	Text-Em-All	Enable Text-Em-All Integration
All (52)	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.	
Search by Category:		
Featured (11)		
_	Not Enabled Details	
Search by integration:		
Text-Em-All		

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

Text-Em-All Integration Settings										
Enter the Admin User Account login credentials.										
Username										
Password										
	Cancel	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

	myDashboo	ard	Jobs	Talent	Timesheet	Invoices	Companies	D
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Avionté Marke	tplace	Utilitie	es > Avi	ionté Marl	ketplace			
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Search by Integration: Text-Em-All	~							

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	×
Enter the Admin User Account login credentials.	
Test 🔤	
••••	
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 .	lobs Talent Timesheet Invoices Companies	Document Text-Em-All Integration Settings	×
Avionté Marketplace utilitie Search Q	a > Avienté Marketplace	Enter your Text-Em-All user credentials. Username Password	
Search by Avionté Module: All (52) 🗸	text-em-all Connect Text-Em-All Text-Em-All Website Since 2005, Text-Em-All helps deliver		Cancel Login
Search by Category: Featured (11)	personalized, informational, text messages and phone calls fast-whether they're going to five people or 500,000.		
Search by Integration: Text-Em-All	Settings Settings		

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.

Text-Em-All Integration Settings		×
Enter your Text-Em-All user credentials. Username Test Password		
The username and or password is invalid. Please re-enter and try again.	Cancel	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.

Text-Em-All Integration Settings		×
Enter your Text-Em-All user credentials. Username		
TEAUser05		
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.	Cancel	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 1	alent Activities & Tasks				×
New It	tem:				
Ente	er new item here		*Required		
Item 1	уре:				
Act	tivity	~	•		
Ado					
	Item	Туре			
	Text-Em-All Announcement Sent	Activity		Edit	
	Text-Em-All Survey Sent	Activity		Edit	
	Text-Em-All Text Received	Activity		Edit	
	Text-Em-All Text Sent	Activity		Edit	
Del	ete 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 It	tem:			
Ent	er new item here		*Required	
Item 1	Гуре:			
Act	tivity	~		
Add	ł			
	Item	Туре		
	Text-Em-All Announcement Sent	Activity	Edit	
	Text-Em-All Survey Sent	Activity	Edit	
	Text-Em-All Text Received	Activity	Edit	
	Text-Em-All Text Sent	Activity	Edit	
Del	ete Selected Items			Close

Integration Usage

Locations to Initiate a Broadcast From

• Talent > Search > Mass Actions

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× P	reviewz	Pipelinex	First Name 🖌	Last Name 🗴 🛛 B	EEO Date 🗸	Email Addr¥	Mobile Phox	City 🗸	State	 Zip Co 	ie 🗸 Latest Job	Y Latest Come	Latest Schor	Latest Degr	Latest Field×	Last Activity	Rep Fir	rst N. y	Rep Last N.y	Flag 🗸 I	.ast Activity
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• Contact > Search > Mass Actions

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• Companies > Jobs > Placements

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Company Dashboard		SB546559225	Kitchen Worker	Stephanie Test	Albus Dumbledore	Defense of Dark Arts	Contract	Mar 22, 2021	Mar 24, 2021	\$25.00	\$35.00	
2 Current Contract												
🙆 Open Job												

• Jobs > Hired Details > Mass Actions

myDashboard Jobs Talent Timesheet Invoices Companie	es Documents Back Office Analyze			@	2	Type to search	۹
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Professor CRR Not Foors Hogwarts - Defense of Dark Arts, Eagan, MN Eagan, MN 55121 Image: Comparison of Compar	All X Stort Dot Create Text-fm-All Broadcast P More Update Trict Ontes & Reasons C Mare Update Trict Ontes & Reasons C Mare Update Trict Ontes & C Mass Actions •	Job ID: Job Owners: Job Office: Sales Rep: Job Notes	S832958225 Stephanie Bauer (ABC Staffing incn/a) CLI Staffing office 1 Stephanie Bauer				Add Widget () Create Clone () () X
Client Profile	ピ×	Job Descriptions	Drop file anywhere on widget.				± ×

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

		n	1yDashboard	Jobs Tolent	Timesheet Ir	woices Comp	anies Docun	nents Back O	ffice Analya	:0	S dl Type to search Q	
		So	arch Add New	Talent Import 1	Text Import Re	sume Spotlight					Create Text-Em-All Broadcast	
alent 1	Terms ~	Туре	to Search								Review the Tolent selected for this Text-Em-All Broadcast below. Verify Tolent has at least one phone number listed. For Tolent without a phone nu listed select the Tolent name to add a number to their profile or remove them from this broadcast.	mber
ralent	t Search	Results									Talent Name v Phone Type v Phone Number v Status v Ret	nove 🗸
~ P	review×	Pipelinez	First Name 🖌	Last Name 🖌	EEO Date 👻	Email Addr¥	Mobile Phox	City 🗸	State	 Zip Code 	Amy Goodworker Mobile Phone +1773 555-1939	×
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~	6		Tim	Test02		timtest02	0000000002	Brookhaven	GA	30319	Tim Test03 Mobile Phone 000000003	×
~	6		Tim	Test03		timtest03_	000000003	Atlanta	GA	30309	Tim Test04 Mobile Phone 000000004	×
~	B		Tim	Test04		timtest04	000000004	Atlanta	GA	30329	Tim Test05 Mobile Phone 000000005	×
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Total I	Unique: 29	90 (Selected	i Items: 15)							< 1	Concel Create Text-Em-Al	l Broadcas

- 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

Create	Broadcast @				5	TART OVER
1 Enter	Settings 2 Cho	ose Recipients	3 Crea	ate Message ————	— 4 Review	& Submit
DELIVERY SE	ETTINGS					
	Which type of messag	e would you like	to send?			
	📞 Voice Only 🧿	Text	Only O	Text & Voic	e 🔿	
	Send a voice call to cell phones and landlines.	Send a text me phones. Landli ignored.	ssage to cell nes will be	Send a text message phones and a voice ca landlines.	to cell all to	
	Which type of broadca	st would you like	e to create?			
	Announcement ②					
	🔘 Survey 💿					
	Transfor recipionts who	they proce "0"				

	en would you like this broadcast to start?
۲	Immediately O Schedule for the future
	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.
Bro	adcast Settings
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Bro	adcast Settings oadcast Name e this broadcast a name to easily reference it later
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Brc Gi Gi	eadcast Settings oadcast Name re this broadcast a name to easily reference it later Iler ID 51) 236-5454 zipients will see this number

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

Create Broadcas	t 0		START OVER
C Enter Settings	Choose Recipients	3 Create Message	Review & Submit
RECIPIENTS SUMMARY			
Total Numbers to be Texted	I	2 View/Remove Recipients	3
BACK		ADD	CONTACTS

c. Create Message – the screen will differ based on the broadcast type chosen Create Broadcast ⁽⁹⁾

Enter Settings	Choose Recipients 3 Create Mes	ssage 4 Review & Submit
MESSAGE		
Voice Message	Record new message	
	🔘 Upload a message 📀	
	○ Select from message library ◎	
ВАСК		CONTINUE

Create Broado	ast 0	START OVER
C Enter Settings	Choose Recipients 3 Create Message 4 Rev	view & Submit
MESSAGE		
Text Message	Characters: 0/640 Credits Per Recipient: 0 [Sood morning, friends!	
	Texts to new phone numbers from this Text Number will have opt- instructions appended to them at no cost.	put
ВАСК		CONTINUE

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

reate Broadca	ast Ø		START OV
Enter Settings	Choose Recipients	Create Message	🗕 Review & Submi
	Almost Please review the info below	finished! v, then click Send Broadcast.	
	Settings		
	Name	Test	
	Туре	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.	
	ВАСК	SEND BROADCAST	

- e. Close Text-Em-All browser tab
- 3. 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		000000002		Invalid phone number: Primary phone		×
Tim Test03		000000003		Invalid phone number: Primary phone		×
Tim Test04		000000004		Invalid phone number: Primary phone		×
Tim Test05		000000005		Invalid phone number: Primary phone		×
Test_ Workn28th1		0001234567		Invalid phone number: Primary phone		×
Work Ntest		0001234567		Invalid phone number: Primary phone		×
Tester WorkN12		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		N

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



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.

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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.

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Active Contractor Applicant		Tex Text	t-Em-All Sur Em-All Surve	rvey Sent on y	Wednesday,	March 31, 202	21 at 10:15 PM											

Conversation Activities

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



Text-Em-All Broadcasts Widget

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▼ Text-Em-All Broadcasts	× S Q
7 Sent	
2 Responses	

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

	Text-Em-All Broad	dcasts - Sent				;
	Name	Broadcast Type	Message	Date Sent	User	Reply
xt-Em-All Broadcasts	Stephanie Test	Text	Conversation message sent	Apr 1, 2021	TEA User	D
	Stephanie Test	Survey	Text-Em-All Survey	Apr 1, 2021	TEA User	D
t	Stephanie Test	Text	Text-Em-All Text	Apr 1, 2021	TEA User	D
nses	Stephanie Test	Announcement	Text-Em-All Announcement	Apr 1, 2021	TEA User	D
	Rex Mitch	Text	Text-Em-All Test Text	Apr 1, 2021	TEA User	Q
	Bingo1234 Bango1234	Text	Test	Apr 1, 2021	TEA User	Q
	Amy Goodworker	Text	Test	Apr 1, 2021	TEA User	D

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

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