

Beyond - Using TextUs

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What is TextUs?

TextUs and TempWorks have partnered to give you the ability to text your employees or contacts en masse without ever leaving Beyond. Our TextUs integration allows you to text candidates and employers directly from TempWorks and automatically archive conversations to the relevant employee or contact record.

Looking to learn more about TextUs? Check out <https://textus.com/>

The screenshot displays the 'Advanced' search configuration interface in the Beyond CRM. The interface is split into 'BASIC' and 'ADVANCED' tabs, with 'ADVANCED' selected. A search bar at the top contains the text 'Search / Employee / Advanced'. Below the search bar, there are several filter criteria defined in a list:

- NOT **AND** OR
- > Is Active IS TRUE Show in results
- > Is Assigned IS FALSE Show in results
- > Interest Code EQUALS Customer Service

At the bottom of the filter configuration, there are buttons for 'SAVE...', 'RESET', and 'SEARCH'. The 'SEARCH' button is highlighted in blue. On the left side of the interface, there is a sidebar with a list of contacts, including 'er Robin' (employee / 429509...), 'Voods, Inc.' (employer / 429500...), and 'oda Shop' (spect / 24).

Note This integration requires additional setup and an existing account with TextUs. For more information, please contact your TempWorks Account Manager.

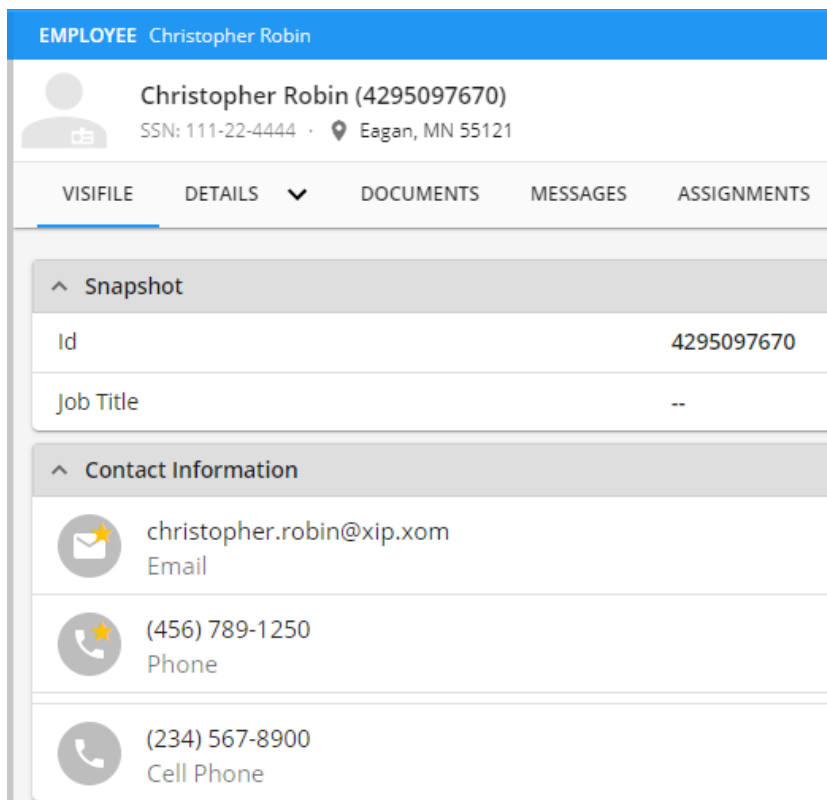
This Article Covers:

1. [Setting Up Contact Info](#)
2. [Sending out a Mass Text](#)
3. [Troubleshooting Tips & Tricks](#)

Setting Up Contact Info

TextUs allows you to send text messages to Employees or Contacts in Beyond. In order to be able to text, you will need to have contact information saved on their record.

Phone numbers can be saved on the employee or contact record from the contact information card on the visifile:



The screenshot displays the 'EMPLOYEE' record for Christopher Robin. The record includes a profile picture, name, phone number (4295097670), SSN (111-22-4444), and location (Eagan, MN 55121). Below this, there are tabs for VISIFILE, DETAILS, DOCUMENTS, MESSAGES, and ASSIGNMENTS. The 'DETAILS' tab is selected, showing a 'Snapshot' section with fields for Id (4295097670) and Job Title (--). The 'Contact Information' section is expanded, showing three entries: an email address (christopher.robin@xip.xom), a phone number ((456) 789-1250), and a cell phone number ((234) 567-8900). Each entry has a plus sign (+) to its left, indicating it can be added or edited.

Category	Value
Id	4295097670
Job Title	--
Contact Information	
Email	christopher.robin@xip.xom
Phone	(456) 789-1250
Cell Phone	(234) 567-8900

Select the + to add a new phone number. This can be Cell Phone, Phone, Office, or Home Phone:

TextUs will attempt to text the phone numbers in the following order:

1. Cell Phone
2. Phone
3. Office/Home Phone

Employees can update their own contact information via WebCenter or HRCenter. See [below](#) for more information

Sending Out a Mass Text

1. Run an employee or contact search with the people you would like to text
2. Select people
 - To select multiple search results, tap the square to the left of the result

<input type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
<input type="checkbox"/>	12959	Abrams	Terri

- To select all results, tap the square at the top of the results - this will select all records shown,

Search returned 694 results
Hire Status, Is Active, Is Assigned, Washed Status

20 selected employees ▼ [Select all 694 results?](#)

<input checked="" type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
<input checked="" type="checkbox"/>	12959	Abrams	Terri
<input checked="" type="checkbox"/>	4295080856	Adams	Tracy
<input checked="" type="checkbox"/>	4295083377	Aikman	Troy
<input checked="" type="checkbox"/>	25927	Alaska	Joe
<input checked="" type="checkbox"/>	25930	Allen	Donna
<input checked="" type="checkbox"/>	4295080492	Anderson	Andrea

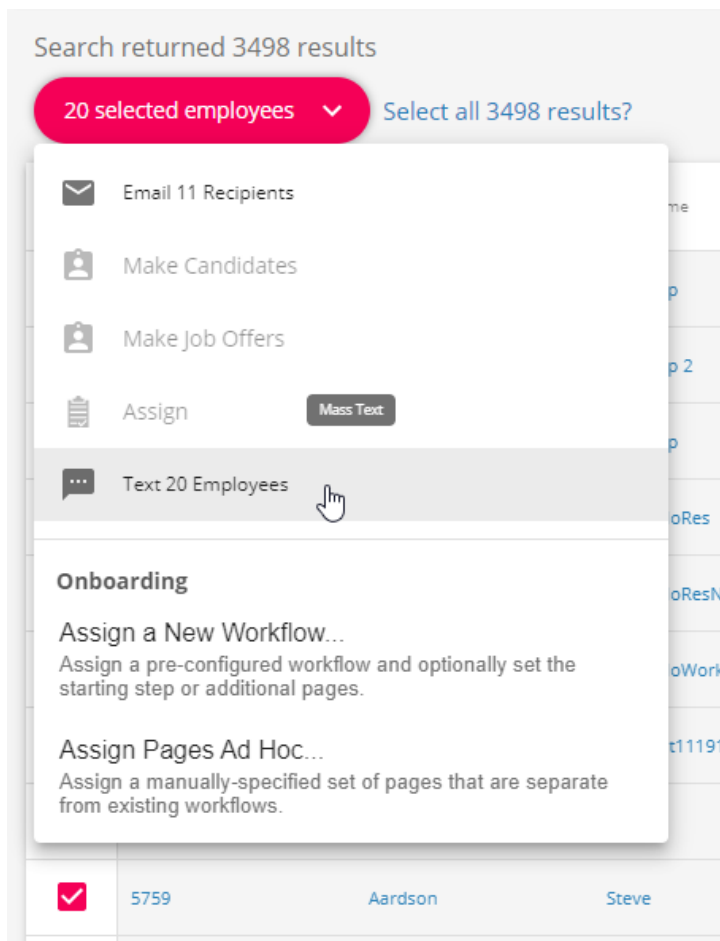
- To select all results click the text above:

Search returned 694 results
Hire Status, Is Active, Is Assigned, Washed Status

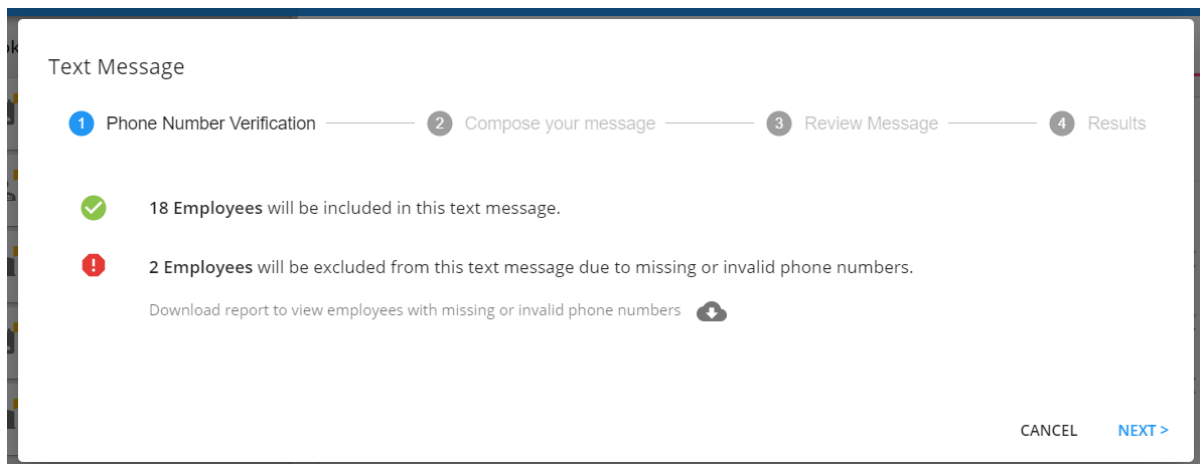
20 selected employees ▼ [Select all 694 results?](#)


<input checked="" type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
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<input checked="" type="checkbox"/>	4295080856	Adams	Tracy
<input checked="" type="checkbox"/>	4295083377	Aikman	Troy
<input checked="" type="checkbox"/>	25927	Alaska	Joe

3. Select the Actions button at the top of the search results and choose text

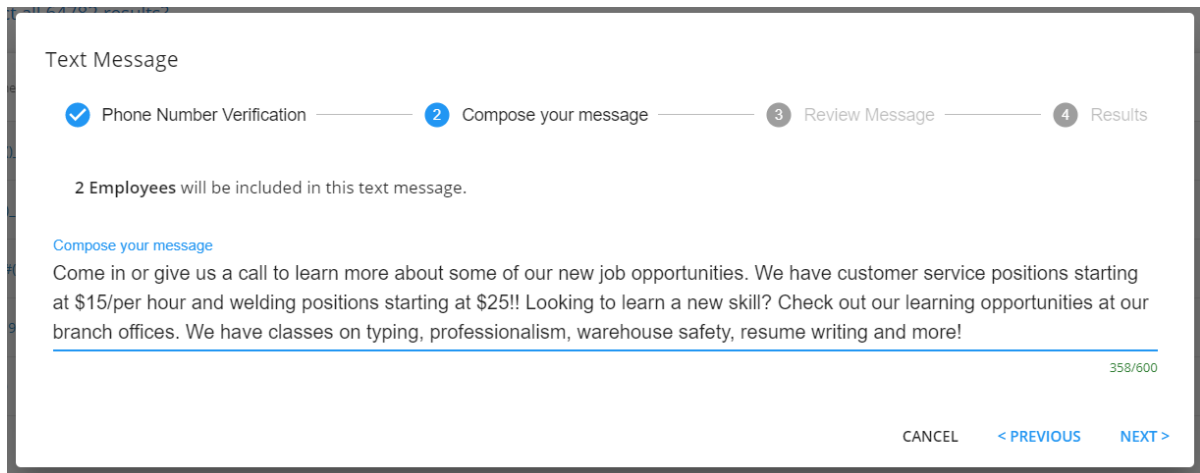


4. This will initiate the texting wizard, the system will first verify which phone numbers that can be texted



- Next to the green check mark will be the total number of employees that can be texted
- Next to the red stop sign will be the total number of employees without a valid number that can be texted
- Tap the  to download a report of the employee's who can not be texted
- Select Next when ready

5. Compose your message:



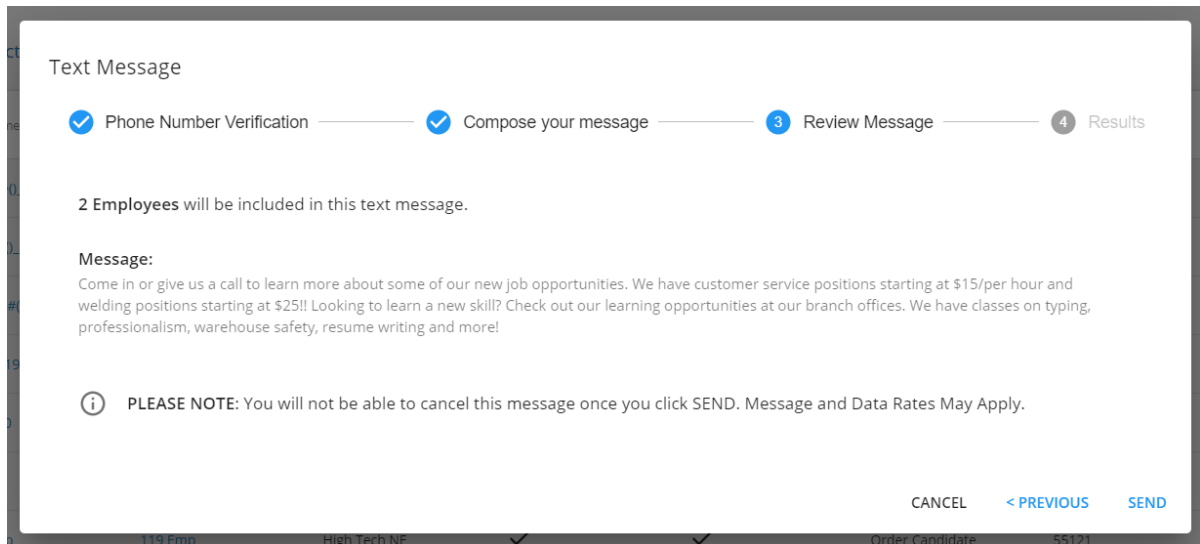
- Enter the text you want to send to these employees (Consider [TCPA compliance](#) when texting en masse)
- Keep in mind you do have a character limit that will turn red when you are over the number of characters you are allowed to send in a message

resume writing and more! We also have baking
 if our branches or respond to this message to
 s available type LEARNING

606/600

- Select Next when you are done composing

6. Review your message










- It's important to review your message before you hit send for any spelling or grammar mistakes.

7. When you are ready, hit send to send your message

- Depending on the number of people you are texting, your messages will be batched to send in groups - the status options here will show you where the texts are in the process
 1. Pending = waiting to send
 2. Sending = in the process of sending
 3. Sent = finished sending
 4. Failed = did not send for some reason

- Click the arrow next to any of the statuses to see a drop down of the employees in this status

18 Sent 

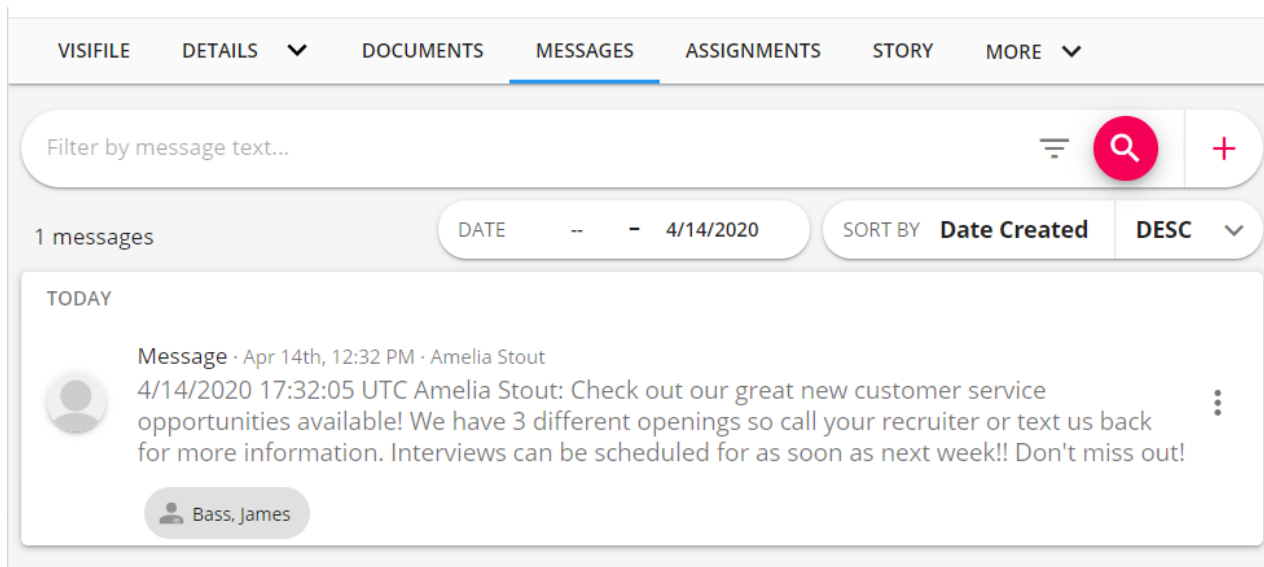
	Abbott, sam Employee Id: 5412	
	Abootorabi, Deborah Employee Id: 5021	
	Adams, Cindy Employee Id: 5024	

- Remember that you can have Beyond open in another window to keep working while it is sending or check on the employee's record to see if the message sent.

Note If you have multiple people with the same phone number in one mass text, the system will not allow the text to go through and the employees with the duplicate numbers will appear on the report of missing and invalid phone numbers. If you want to text these people, consider double checking and updating their phone numbers or only choosing one of them to text.

What Happens Next?

The message will be logged with a date and time stamp on the employee's record once the conversation time has run out. By default, this is after 5 minutes of no replies:



The screenshot shows the TextUs application interface. At the top, there are navigation tabs: VISIFILE, DETAILS (with a dropdown arrow), DOCUMENTS, MESSAGES (highlighted with a blue underline), ASSIGNMENTS, STORY, and MORE (with a dropdown arrow). Below the tabs is a search bar with the placeholder text "Filter by message text...". To the right of the search bar are icons for a list, a magnifying glass, and a plus sign. Below the search bar, there is a summary of "1 messages" and filters for "DATE" (4/14/2020) and "SORT BY" (Date Created, DESC). The main content area shows a message from Amelia Stout on Apr 14th at 12:32 PM. The message text is: "4/14/2020 17:32:05 UTC Amelia Stout: Check out our great new customer service opportunities available! We have 3 different openings so call your recruiter or text us back for more information. Interviews can be scheduled for as soon as next week!! Don't miss out!". Below the message is a reply bubble from James Bass.

The conversation can be continued within the TextUs application and the conversation will continue to be logged on the employee's record in Beyond.

Troubleshooting Tips & Tricks

Check out the following tips and tricks if you are having trouble texting.

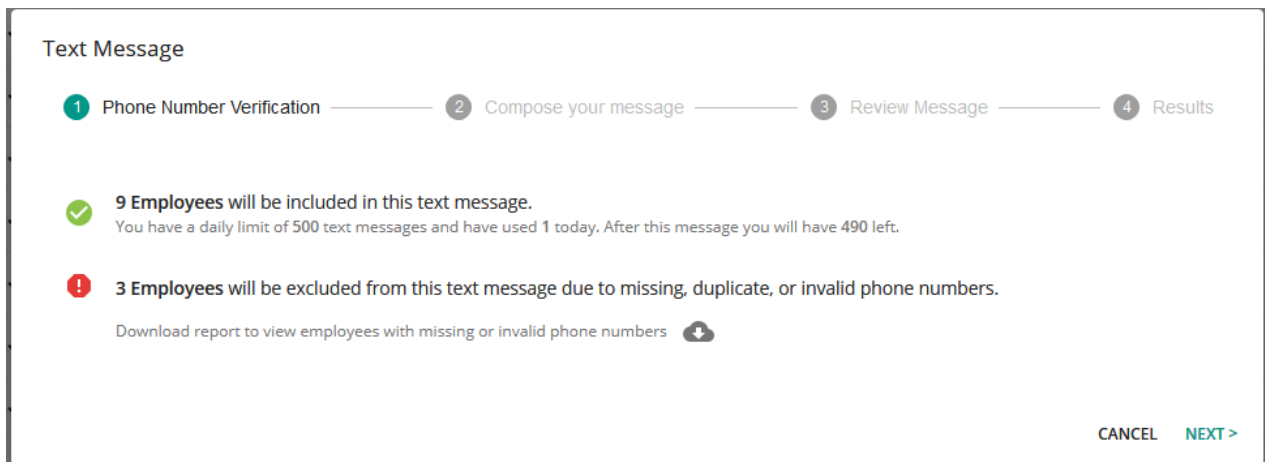
- [I Have a Daily Limit with TextUs](#)

- [I Can't Text in Beyond](#)
- [My Text Messages Aren't Going Through](#)
- [I Need Updated Contact Information](#)
- [Can My Employees or Contact Opt In/Out? \(TCPA Compliance\)](#)

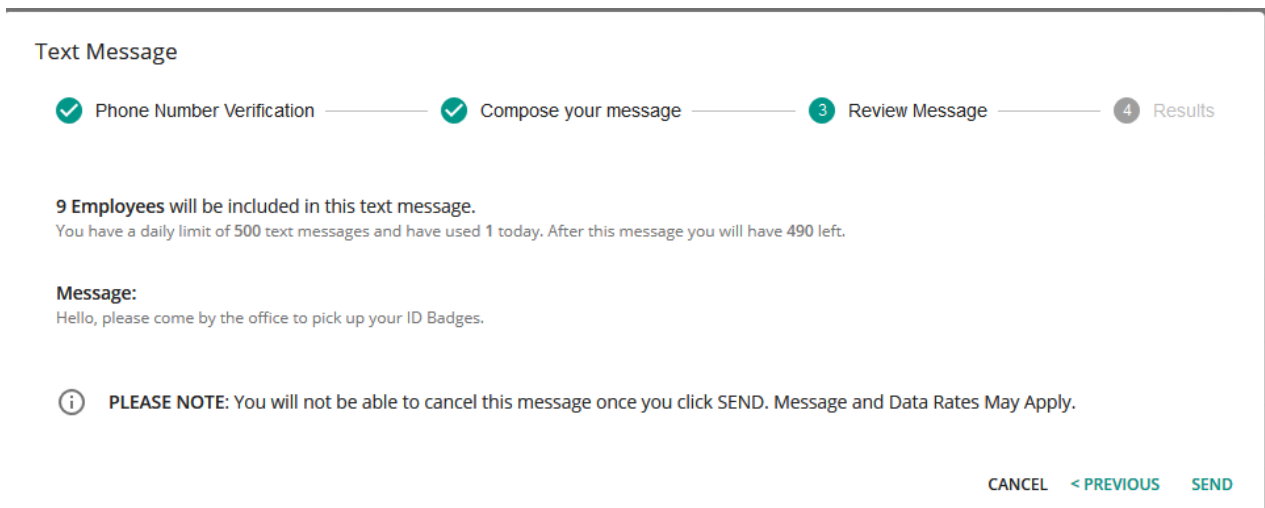
I Have a Daily Limit with TextUs, How Does That Work With Beyond?

TextUs may have a daily limit for mass texting depending on your contract. Daily limit information will display when you are sending out a mass text.

When you first open the Texting option, your daily limit information will display under the number of employees included in this text message:

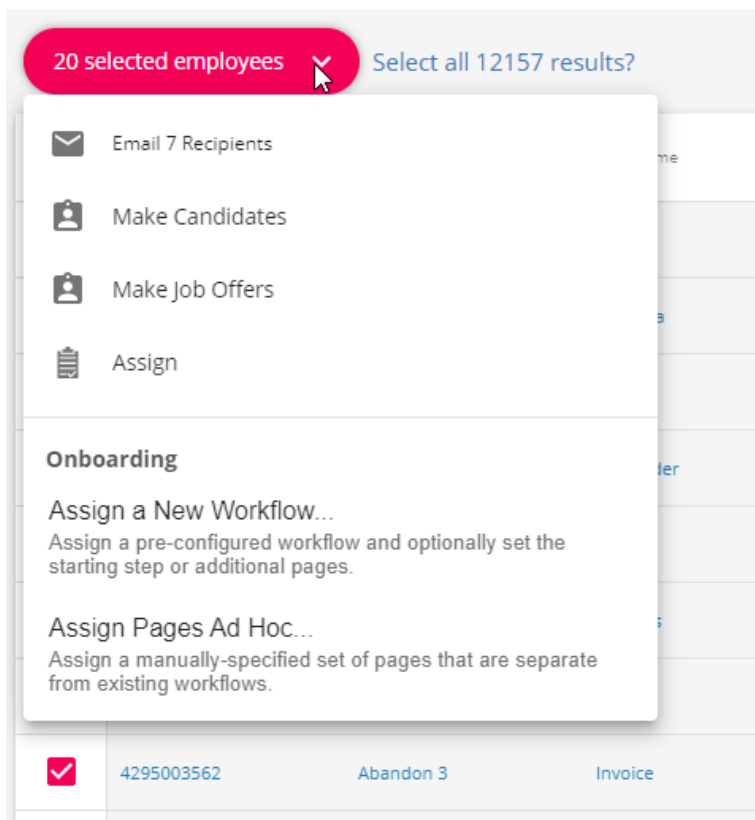


The daily limit information will also display when you are reviewing your text message because if you have multiple users sending mass texts, the number of remaining texts available may have changed in the time it took to compose your message:

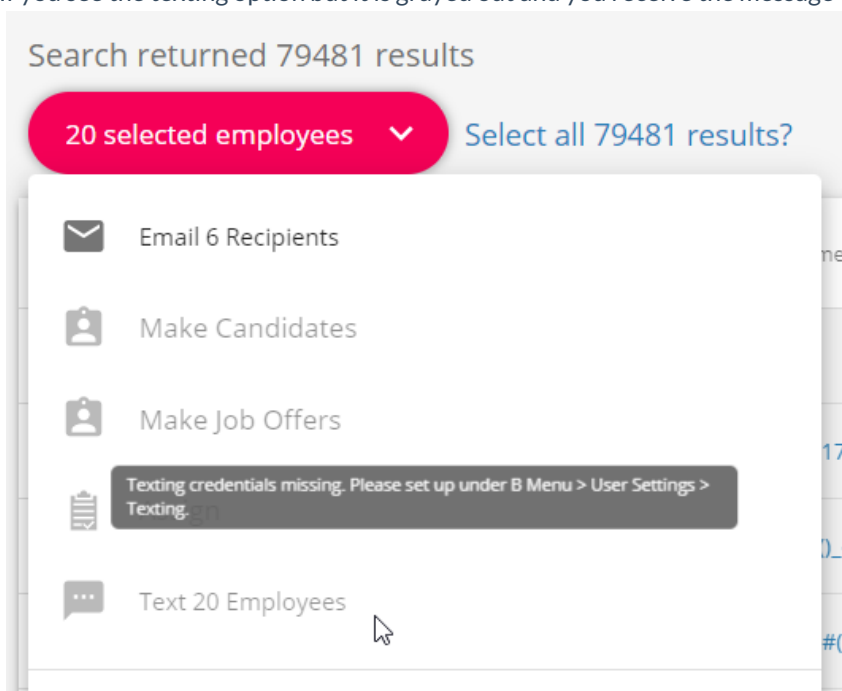


I Can't Text in Beyond

If you don't see the texting option under the actions menu in an employee or contact search, you should have your admin check your **Permissions**.



If you see the texting option but it is grayed out and you receive the message "Texting Credentials Missing":



You need to set up your TextUs account under User Settings > Texting. Check out [Beyond - Setting Up TextUs](#) for more information.

My Text Messages Aren't Going Through

Check that your credentials are still valid by navigating to Beyond menu > user settings > Texting and selecting Test.

See [Beyond - Setting Up TextUs](#) for more information

Review the employee's or contact's contact information on the visifile:

The screenshot shows a user interface for an employee's profile. At the top, a blue header reads "EMPLOYEE Christopher Robin". Below this is a profile card for "Christopher Robin (4295097670)" with a social security number of "111-22-4444" and a location of "Eagan, MN 55121". A navigation bar includes tabs for "VISIFILE", "DETAILS", "DOCUMENTS", "MESSAGES", "ASSIGNMENTS", and "STORY". The "Snapshot" section displays the employee's ID as "4295097670" and their job title as "--". The "Contact Information" section lists an email address "christopher.robin@xip.xom" and a phone number "(456) 789-1250".

Updating Contact Information

My text messages aren't being received because most of my employees need to update their phone numbers in our system

Via WebCenter

Have employees in WebCenter navigate to my information (on the home screen) and update their phone preferences

The screenshot shows the "My Information" page in the Hillview Staffing WebCenter. The top navigation bar includes icons for "Home", "Assignments", "Calendar", "Timecards", and "Pay History". The "My Information" section has tabs for "General Info", "Address", "Resumes", and "Other Documents". Under "General Info", the "Email Address" is listed as "a.woodbridge@xip.xom" with an "Update Email Address" link. The "Cell Phone Preference" is listed as "<no cell phone number>, <no provider>, Receive Texts: Yes" with an "Update Cell Phone Preference" link. A mouse cursor is pointing at this link. Below this, there are sections for "Buzz" with a "Generate Invite Code" link, and "Password".

Via HRCenter

Consider mass assigning the Contact Information page for employees to fill out and submit

Contact Information ▾

Cell Phone (Voice and Text) ▾

Primary Phone Number*

Required information missing or invalid

Cell Phone Carrier*

Required information missing or invalid

Receive texts about jobs?*

Required information missing or invalid

Secondary Phone Number

Emergency Contact

Mom

Emergency Contact Phone

(213) 456-7890

Check out [Beyond - How to Assign a New HRCenter Workflow or Page](#) for more information.

Can My Employees or Contact Opt In/Out? (TCPA Compliance)

In accordance with the Telephone Consumer Protection Act (TCPA), TextUs allows for employees or contacts to opt out of text messages they receive. We recommend considering adding language to the bottom of any mass text to let them know how to opt out in case they no longer want to receive these messages.

Check out TextUs's Support page for more information: <https://help.next.textus.com/en/articles/2856342-textus-opt-out-and-opt-in-supported-keywords>

Any text message sent from Beyond with TextUs will honor the opt out/in status of the contact.

Related Articles