

Text Messaging 10R2

The Text Messaging option within Tempworks is accessed through the Email functionality. First, an employee, customer, or contact needs to be set up to receive Text Messages to their cellular phone and then the Email functionality can be utilized to send them messages.

To set up an employee to receive Text Messages navigate to their associate record within Tempworks. From the Employee Visifile, click on the "Chg #s" button as circled below.

Date	Action	Message	Rep	Contact	Customer	Due	Done?
A 01/27/06	Available	Ready to work, especially Exec admin positions	alpha				<input type="checkbox"/>

Interest Codes	Customer	Job Title	OrigStart	Start	End	Bill	Pay	Order	Prf
Administrative Assistant	Edit	Barry's Dome Dogs	Data Entry	06/05/06	06/05/06		13.44	8.00	4482

When the "Chg #s" button is clicked the user is navigated to the Contact Methods form where phone numbers and email addresses can be set up.

Swinton, Edyta (584) 993-9483 SSN:588-39-3298
Id:5800

Active	Type	Numbers / Addresses	Notes
<input checked="" type="checkbox"/>	Phone	(584) 993-9483	
<input checked="" type="checkbox"/>	Cell Phone	(483) 459-3943	
<input checked="" type="checkbox"/>			

Cell Provider: [Dropdown]

ProviderName	EmailSuffix
Cingular	@cingularme.com
Verizon	@vtext.com
AT&T	@mmode.com
Use universal text messaging address	@teleflip.com
SprintPCS	@messaging.SprintPCS.com
Tmobile	@tmail.net

In the Type column select *Cell Phone* from the drop down menu and enter the employee's cell phone number in the Numbers/ Addresses field. The last step for setting up the employee to receive Text Messages is to select their cellular phone provider from the Cell Provider drop down menu.

**Note – If the cellular phone provider is not known the user should select the Use universal text messaging address selection.*

To set up a customer to receive Text Messages navigate to their customer record within Tempworks. From the Customer Address/Basic Sub Tab, click on the "Change Phone and Email" button as circled below.

Customer: Crom Equipment 10623
 Status: Active
 Department: Primary
 Date Created: 12/06/01
 Active Date: 03/01/02

Main Address:
 Street1: 3300 Enterprise Drive
 City: Fort Pierce
 State: FL Zip: 34950

Billing Address (if Different):
 ATTN:
 Street1: 3300 Enterprise Drive
 City: Fort Pierce
 State: FL Zip: 34950
 Phone: (666) 466-7788x
 E-mail: dalyce@tempworks.com
 Website: www.cromeq.com

Change Phone and Email

When the "Change Phone and Email" button is clicked the user is navigated to the Contact Methods form where phone numbers and email addresses can be set up for the customer as shown above for the employee. Follow the same steps to enter the cellular phone number and choose the provider.

To set up a contact to receive Text Messages navigate to their contact record within Tempworks. From the Contact Visifile click on the "Chg #s" button as circled below.

Company: Crom Equipment
 Branch: Memphis SE
 Email: BrendaF@Crom.com
 Status: A
 Date: 06/04/02
 Title: Vp

Chg #s

Contact Methods:
 Office Ph: (561) 345-3463x4
 Email: BrendaF@Crom.com

Msg Date	Action	Message	Rep	DateDue	Completed?
07/21/06	Submitted	resume sent	alisha		A
04/12/06	Interview	9:00am interview with Jim Holcomb	dwood	09/13/06	A
04/12/06	Rejected	Not enough experience	dwood		A
04/12/06	Email	Candidate Resumes for Order # 4379	dwood		A
04/12/06	Submitted	Submit Resume	dwood		A
04/12/06	Submitted	Submitting Resume	dwood		A

When the "Chg #s" button is clicked the user is navigated to the Contact Methods form where phone numbers and email addresses can be set up for the contact as shown above for the employee. Follow the same steps to enter the cellular phone number and choose the provider.

Now that the records have been set up to receive Text Messages the user can navigate to the Tempworks emailer via the associate record, customer record, document management, or contact record by clicking on the "Emailer icon" (the envelope inserted into a mail slot).

Employee record for Swinton, Edyta (584) 993-9483 SSN:588-39-3298 Id:5800. The 'Visifile' tab is active. Under 'Contact Methods', the 'Email' field is 'eswinton@norealemail.com' with an email icon circled in red.

The employee email icon is on the Visifile and is also available from the Address/Other Sub Tab as pictured below.

Employee record for Swinton, Edyta (584) 993-9483 SSN:588-39-3298 Id:5800. The 'Address' tab is active. Under 'Other Application/Contact Information', the 'Email' field is 'eswinton@norealemail.com' with an email icon circled in red.

Customer record for Crom Equipment 10623 (666) 466-7788x Primary. The 'Address' tab is active. Under 'Billing Address (if Different)', the 'E-mail' field is 'daljce@tempworks.com' with an email icon circled in red.

The customer email icon is on the Address/Basic Sub Tab.

Documents management screen showing a search interface and a table of documents. The table has columns: Doc Name, Doc Type, Original File Name, Description, Type, Ver, Date. The first row is 'E-dyta resume' with an email icon circled in red in the action column.

The document management email icon is to the far right on the screen and attaches the corresponding document to the Email.

Contact record for Fisher, Brenda (561) 345-3463x4. The 'Visifile' tab is active. Under 'Contact Methods', the 'Email' field is 'BrendaF@Crom.com' with an email icon circled in red.

The contact email icon is on the Visifile.

When the "Email icon" button is clicked from any of the above areas the Tempworks Email functionality will be opened. Enter the subject and text in the appropriate fields. The Email Note that is added will not be sent with the Text Message, but it will be included in the message that is logged on the recipients' record(s).

To add additional recipients to the Text Message, click on the Recipients Tab. The user will see the view below and can select employees, contacts, and co-workers as recipients of the Text Message.

Aident	LastName	FirstName	Email	Company	Add All
5129	Hawkins	Katie			Add
5130	Healthy	Tom			Add
5518	Hattel	Leo			Add
5574	Hanks	Tom	new@newemploy		Add
5593	Haru	Smith			Add

Sel	Email	Recipient Name	LastName	FirstName	To	Sent	Source
<input checked="" type="checkbox"/>	eswinton@norealemail.com	Swinton, Edyta	Swinton	Edyta	To		Employee
<input checked="" type="checkbox"/>	new@newemployee.com	Hanks, Tom	Hanks	Tom	To		Employee

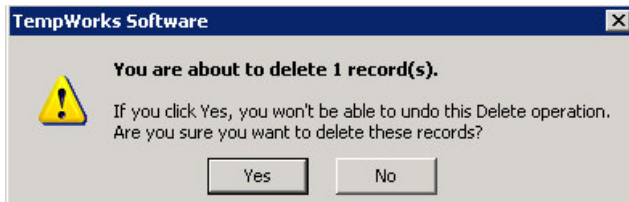
To look up and add recipients select the Email Source (ie. employee, contact, or servicrep). Enter the search criteria (ie. name, customer, etc.) and click on the "binoculars icon" button as circled above.

The search results will be displayed to the right of the "binoculars icon" button and can be sorted in ascending or descending order by clicking on the column headers. To add a recipient from this list, click on the "Add" button to the right of the intended recipient.

The recipient will then be added to the recipient list at the bottom of the screen.

Sel	Email	Recipient Name	LastName	FirstName	To	Sent	Source
<input checked="" type="checkbox"/>	new@newemployee.com	Hanks, Tom	Hanks	Tom	To		Employee
<input checked="" type="checkbox"/>	eswinton@norealemail.com	Swinton, Edyta	Swinton	Edyta	To		Employee

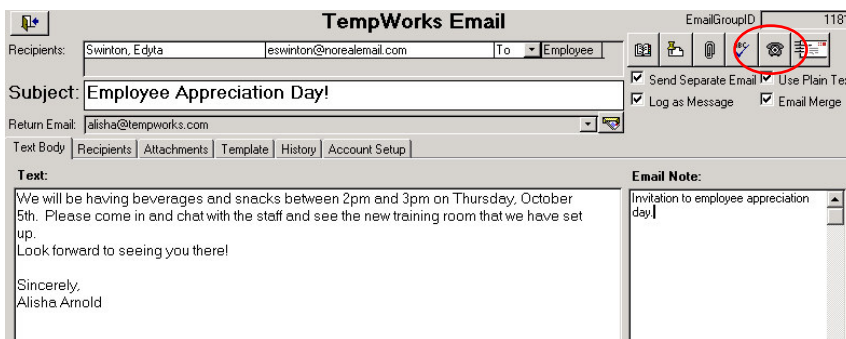
To remove the recipient from the list, click the cursor on the gray square to the far left of the recipient's line. Then click on the "delete" key on the keyboard. A warning window will be displayed to verify that the recipient should be removed from the list.



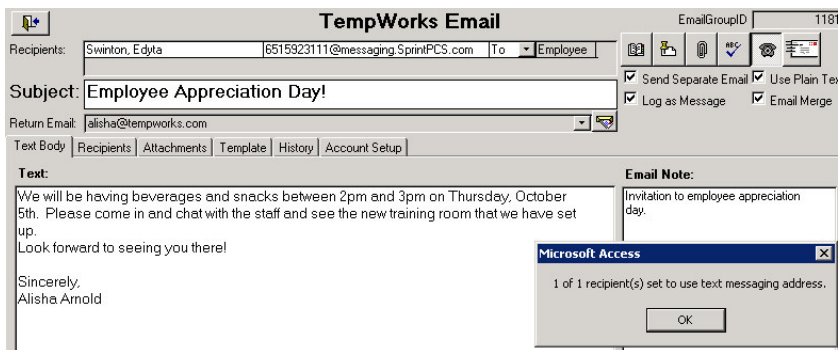
If the recipient should be removed click on the "Yes" button, if not, click on the "No" button.

Recipients can also be removed from the final list by removing the check mark from the Select (Sel) box to the right of their name.

Once the recipients have been selected the user needs to click the "Phone icon" in the upper right corner to send the Text Message.



If the Text Message was successful the following window will appear letting the user know how many messages were sent.



Once the Text Message has been sent an email can be sent as well by clicking on the "Letter icon" button. If not sending the email click on the "Close Door" to exit the Tempworks Email functionality.