

Quick Guide to Using Text Messaging

Now you can send text message reminders to prospects along with the email reminders you use to keep people connected and engaged through the recruitment cycle. Let's quickly review the new SMS text messaging functionality.

Locating your SMS text message library:

Just like your email template library, you also have a text message library where you can store and create templates for everyday use. To locate your library, click the "settings" button, then the "mail" tab and finally – "sms templates":



Setting up new templates for SMS:

To create or edit a template, you follow the same process you would when building an email template. Click "add" to create a new template, then complete the fields to name and describe the template. Select if you want to make this template available to other users (or have the ability to edit). Instead of a full html customization bar, you will only have the option to insert macros to auto populate fields with candidate name or event type.

<u>×</u>	Manage SMS Templates – 🗖 🗙
My Templates	Template Details
Event Reminder Interview Confirmation Interview Follow Up	Template Name Event Reminder Description Image: Share with All Cheryl Users Image: Allow others to change this template Insert Image: Share with Reminder: you have an interview at {!event.eventdatetime}. Email me at {!user.email} if you have any questions.
Add Delete	Length: 111/120 Save Cancel

As you create your message, use the text length field below to monitor your message, to make sure it's not more than 120 characters. Exceeding this character reference will lead to your message truncating – resulting in 2 messages being sent instead of 1 (to accommodate for the length of your communication).

	Insert Candidate My Reminder	 n interview at {!event.eventdatetime}. Email me at ve any questions.
Add Delete	Length: 111/120	Save Cancel

Remember to click "save" to add your new template to your list.

Note: each message will automatically include an opt-out option, to ensure recipients have a way to stop receiving your text. See the same message below:



Setting a SMS text message reminder:

To set a text message reminder from the candidate's lead progress events, follow the same prompts you would to arrange an email reminder. Note the "enable text message" check box circled below:

🔒 Pay Board 🧿 Other	Schedule 1st Interview						
Name Darren Romero Patricia Bolanos-Jimenez Bentley Taylor Joshua Schmude Eric Ogunbuse Jules McClan	Schedule: 1st Interview Date: 9/6/2013 Add to calendar for Cheryl Manager * When: 1:00pm Calendar * Duration: 1 hour * Candidate: Darren Romero						
● Page 1 of 1 ● ● ● <	Tracking:						
lead progress 1st Low Priorit. schedule 2nd Low Priorit. schedule High Priority F schedule Pre-Interview schedule 1st Interview schedule 2nd Interview schedule Offer Pending schedule Offer Follow-up schedule Licensing (Onli schedule	 X 1 days before notify Candidates via Example - Thank You Confirmation (Pre-Interview) days before notify Cheryl Manager via Interview Confirmation (Internal) add new Send Now X Send to Candidates via: Example - Thank You Confirmation (Pre-Interview) add new Send to Candidates Via: Example - Thank You Confirmation (Pre-Interview) Save Cancel 						

To send a text message to a candidate, you MUST confirm that the candidate has given you permission to send them text messages. This is critically important as mobile users may pay for text messages through their carrier. Sending an unwanted/unauthorized text message can potentially damage your relationship! To enable your ability to send this candidate a text, you must click the check box and then enter the mobile number the candidate authorized for use. Mobile numbers can be entered in the following formats: (XXX) XXX-XXXX, XXX-XXXX and XXXXXXXX. Please only use the 10 digit dialing format. You do not need to enter a (1) before the phone number.

V 💀 Enable Text Messages

By checking this box, I confirm that **Darren Romero** has authorized me to send text message reminders concerning this event to this mobile number: (512) 555-9784

Once enabled, you will have the ability to select the type of reminder you want to set for your candidate.

Schedule 1st Interview								
Schedule:	nedule: 1st Interview							
Date:	9/6/2013 🗹 Add to calendar for 🗌 Cheryl Manager 💌							
When:	1:00pm Calendar 💌							
Duration:	1 hour -							
Candidate:	: Darren Romero							
🔽 📑 🛛 Ena	able Text Messages							
	By checking this box, I confirm that Darren Romero has authorized me to send text message							
Reminders Notifications								
¥ 3								
x 3	3 days before notify Candidates Via Lample - Inank You Continuation (Pre-Interview) Via Lample - Inank You Continuation (Pre-Interview) Via Lample - Inank You Continuation (Pre-Interview)							
× 1	days before 🔻 notify 🗌 Candidates 🔹 via 🔀 Event Reminder (Internal) 🔹							
add r	new Email							
🔀 Send N	Now Text Message Event Reminder							
X Send to Candidates via: 🔀 Example - Thank You Confirmation (Pre-Intervie Interview Confirmation								
add new Interview Follow Up								
	Manage sms templates							

You can also send immediate text messages from the "send now" section:

V 🗟 🛛 🛛	inal	ole Text Message	25			
	By checking this box, I confirm that Darren Romero has authorized me to send text message					
		reminde	rs concer	ning this event to this m	obile i	number: (512) 555-9784
Reminder Notifications						
×	3	days before 🔹	notify	Candidates 🔹	via	🔀 Example - Thank You Confirmation (Pre-Interview) 🔷 🔻
×	3	days before 🔹	notify	📃 Cheryl Manager 🔹	via	🔀 Interview Confirmation (Internal) 🔹
×	1	days before 🔹	notify	Candidates	via	🔀 Event Reminder (Internal) 👻
add new						
Send Now						
🗙 Send to 🔲 Candidates 👻 via: 🔀 Example - Thank You Confirmation (Pre-Interview) 💌						
ac	add new Email					
Text Message						

When reminders are scheduled, click "save" and you are all set!

Using text message reminders in your Auto Scheduler:

If you are running Auto Schedulers for hiring campaigns where you give candidates access to self-schedule their interviews – you may want to include text reminders in your Auto Scheduler set up, to accompany any email reminders you have established.

X	Settings		x		
			_		
General	Share with	All Cheryl Users			
>	Event type	1st Interview 💌			
C InsuraSeek Search	Schedule for	Cheryl Manager View Imit to dates between 2 and 20 days in advance		🗌 Me 🛛 🗹 S	how Google events 🚺 Add Event 🔻
C Zip Codes	Confirmation Messages	Candidate, Lead Assignee, Calendar Owner 🔻			
Mail	Reminders Greeting message	Candidate, Lead Assignee, Calendar Owner		Interview Reminder (Cand	didate)
Signature	BIUAĂ	X 1 days before Via:		Interview Reminder (Mana	ager) 🔻
Auto Schedulers	Hello {!candidate.	X 1 days before v notify Calendar Owner v via: X 1 days before v notify Candidate v via:	sele	event Reminder (Internal) ect	
G Google Calendars	XYZ Insurance is h	add new		Email •	
	next few weeks, a	nd we've identified you as a professional		Text Message 🔹 🕨	Event Reminder
Add Delete					Interview Confirmation Interview Follow Up
Log Folder	Save	el		Manage sms templates	
Assigned Candidates					

Note: Always be sure to include an email reminder to the candidate – just in case the recipient does not opt-in for text message reminders on the scheduler page. (See the opt-in message candidate's receive when on the scheduler web page):

Select a date					
(All times are Pacific Standard Time)					
Send me text message reminders					
at this mobile number:					
Schedule!					
- OF -					

None of these dates works for me, please follow-up with me.