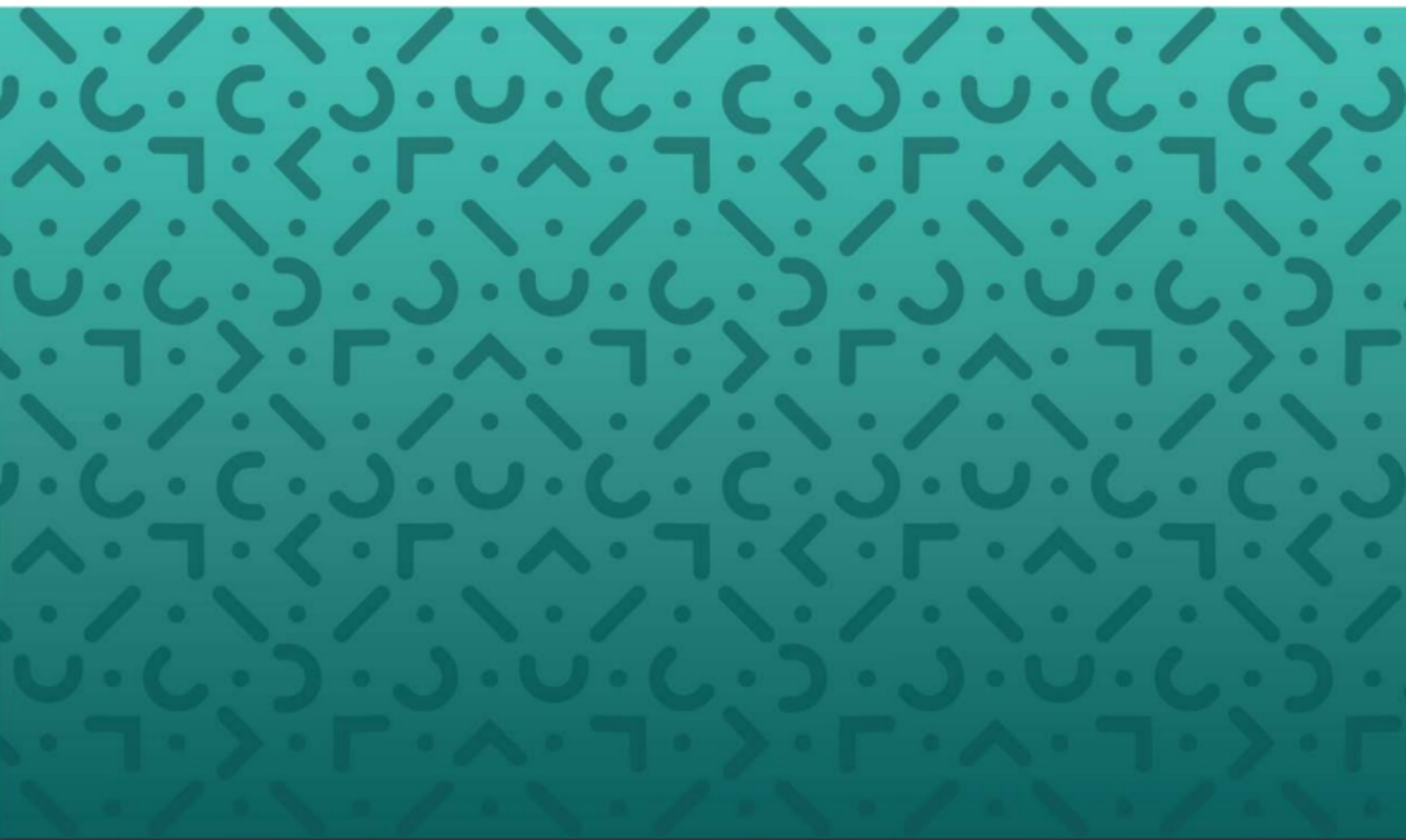




SMS Integration with Twilio Marketplace

User Guide



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SMS Integration with Twilio Marketplace User Guide

The SMS Integration with Twilio provides the ability to configure Short Messaging Service (SMS) notifications within the UKG Ready application. When this integration is added and set up, SMS message configuration will be available in the following areas:

- Global Notifications
- Workflow Notifications
- Communication Templates (HR only)

Twilio offers a global platform that makes sending SMS notifications easy.

- Send SMS messages with local and toll-free numbers, short codes, custom alphanumeric sender IDs, or by using your own existing phone numbers.
- Send Multimedia Messaging Service (MMS) messages. Outside the U.S. and Canada, attachments are sent as links.
- Send text messages over the carrier network to any phone, anywhere in the world.
- Automatic route monitoring ensures that long-code phone numbers are used to send messages when a carrier is unable to receive messages from short codes, and that global messages always take the best path.
- Send long messages and Twilio will automatically segment and reassemble them.
- Messages sent to the same person automatically uses a previously recognizable phone number to create a consistent experience and maintain conversation history.

You must set up an account with Twilio prior to using this functionality with Workforce Ready. We have provided links under the **Pricing** tab of the Marketplace product to help you contact them, view Twilio pricing structures, and other Twilio support information.

Requirements and Prerequisites

To take advantage of SMS functionality, you must complete a few steps prior to using it. First, you must add the **SMS Integration with Twilio** marketplace product. Once added, there are a few housekeeping steps to complete in your company. Once that is done you will then be able to select SMS options within company notifications.

Download the Marketplace Product

To add the marketplace product, navigate to **Marketplace > Marketplace Setup** and add the **SMS Integration with Twilio** marketplace product to the company.

Note: The marketplace product contains links and information to Twilio. You must create a Twilio account and gather information from them before you can complete the final installation of the product.

- From the **Home** or **Search/Browse** tab, locate and click the **SMS Integration with Twilio** product hyperlink.
- Click **Add To Company**. You will be prompted to sign the **Terms And Conditions** page.
- After signing the **Terms And Conditions**, select a security profile for the users who will manage this product. This is typically the Company Administrator.
- After clicking **OK**, the system will process for a bit and when finished, a **Success** message will display.
- You can verify the installation on the **Installed** tab.

After you've created your Twilio account, the next step is to edit the marketplace product settings and add your Twilio information.

- Under the **Installed** tab, click the edit icon for the product.
- Input the Twilio **Account SID**, **Authentication Token**, and **Messaging Service SID** into the appropriate fields.

Global Setup

Once your marketplace product is installed and completed, you will then need to edit a few settings in your company.

Enable SMS notifications globally. Multiple options are available. After selecting an option here, SMS fields will then become available in the application. Skipping this step will result in no SMS settings being available. Optionally, you can configure a custom SMS Header that will be appended to the front of each SMS notification.

Navigate to the **Company Configuration** widget under the **Company Info** tab, located under **Company Settings > Global Setup > Company Setup**, and select an SMS option in the **Notifications Through** field.

Company Setup

Company Configuration

Total T
 Curre
 Default Employee Curre
 Standard Work Day (HH:
 Standard Work Week (HH:
 View Counter Record
 MAIL SETTINGS
 Mail Account
 Notifications Through
 SMS Header

Email
 Mailbox
 SMS
 SMS & Email
 SMS & Mailbox
 Email & Mailbox
 Email & Mailbox & SMS

Use Currency Code ☐

Override

SMS: Will use only SMS messaging.

SMS & Email: Will use SMS messaging and allow the email option as well.

SMS & Mailbox: Will use SMS messaging and allow the user's mailbox to receive messages.

Email & Mailbox & SMS: Will use SMS messaging, user mailboxes, and email.

SMS Header: In this field, you can optionally type a customized header that will be appended to the front of each SMS message sent from the system. For example, you may want to alert recipients who the alert is coming from by entering your company name in this field, i.e., OURCOMPANY: rest of header.

Employees can enable/disable SMS in notification preferences. End users will be able to toggle their own SMS notification preferences under **My Info > My Information > Notification Preferences**.

Notification Preferences

Select Delivery Method

☒ Primary Email
☒ Mailbox
☒ SMS

Broadcast Messaging can be turned off by unchecking the related boxes for Broadcast Email, Broadcast Mailbox, and Broadcast Message SMS. Unchecking these has no effect on the options under them for Primary Email, Mailbox, and SMS. If Primary Email, Mailbox or SMS are disabled, the corresponding Broadcast Messaging option is disabled as well.

← Notification Preferences

☒ Broadcast Email

☒ Mailbox

☒ Broadcast Mailbox

Note: To comply with Twilio and industry standards, end users will be able to reply with STOP, CANCEL, etc. to any SMS notification. If they do, notification preferences will be updated in the application to disable SMS. Notification preference changes can be audited in the Account Audit Trail report as well.

← Notification Preferences

Select Delivery Method

☒ Primary Email

☒ Mailbox

☒ SMS

SMS is currently disabled because user has opted out. To opt in again, please text START to +13173427186

Configuring Communications with SMS

You can configure the system to use SMS in notifications, workflows, and recruitment.

SMS in Notifications

Once your company has been edited to enable SMS messaging fields, you can then begin using SMS messages in notifications. Notifications are configured under **Company Settings > Global Setup > Notifications**.

Depending what was selected in **Company Setup** will determine the fields available in notifications. The **SMS Message** will be disabled by default. Check the **Enabled** checkbox to activate the message options. Once enabled, you can then type a customized message and use the system tags to create a message. The messages have a 1400-character limit.

Email/Mailbox Message

Email/Mailbox Enabled ☒

From* TIME@entertimeonline.com

Subject* Time Off Requested

Message

Hi {RECIPIENT_FIRST_NAME},

{REQUESTER_FULL_NAME} has requested {REQUESTED_TIME_OFF} on {DAY_REQUESTED} for {HOURS_REQUESTED} hour(s) with the following comment: {COMMENT}.

Please {LOGIN:TIME_OFF_REQ_TO_APPROVE} to process this request.

Thanks!

Attachments [ADD](#)

TAGS

[Download Tags](#)

- {AMOUNT_WITH_UNIT_REQUESTED}
- {COMMENT}
- {CURRENT_DATE}
- {DAY_OF_WEEK_REQUESTED}
- {DAY_REQUESTED}
- {FIRST_REQUESTED_DATE}
- {FIRST_REQUESTED_DAY_OF_WEEK}
- {HOURS_REQUESTED}

SMS Message

Enabled ☐

SMS Message

Enabled ☒

Message

TAGS

[Download Tags](#)

- {AMOUNT_WITH_UNIT_REQUESTED}
- {COMMENT}
- {CURRENT_DATE}
- {DAY_OF_WEEK_REQUESTED}
- {DAY_REQUESTED}
- {FIRST_REQUESTED_DATE}
- {FIRST_REQUESTED_DAY_OF_WEEK}
- {HOURS_REQUESTED}

limit: 1400 characters. remaining: 1400

SMS in Workflows

SMS notifications can also be added to the **Generate Notification** step in workflows. This will generate a SMS message to the designated recipient when the workflow proceeds to the **Generate Notification** step. Workflows are located under **Company Settings > Global Setup > Workflows**. The **SMS Enabled** checkbox will be unchecked by default. Check to activate the SMS messaging options.

Step Properties: Generate Notification

Email/MailBox Enabled ☒

From

Subject Time Off Rejected

Message

Hi {RECIPIENT_FIRST_NAME},
Your request of {REQUESTED_TIME_OFF} time in the amount of {HOURS_REQUESTED} hour(s) on {DAY_REQUESTED} has been rejected with the following comment:
{COMMENT}

Attachments

SMS Enabled ☒

SMS Message

TAGS

Download Tags

{AMOUNT_WITH_UNIT_REQUESTED}

{CHANGES_MADE}

{CHANGES_MADE_BY_FIRST_NAME}

{CHANGES_MADE_BY_FULL_NAME}

{CHANGES_MADE_BY_LAST_NAME}

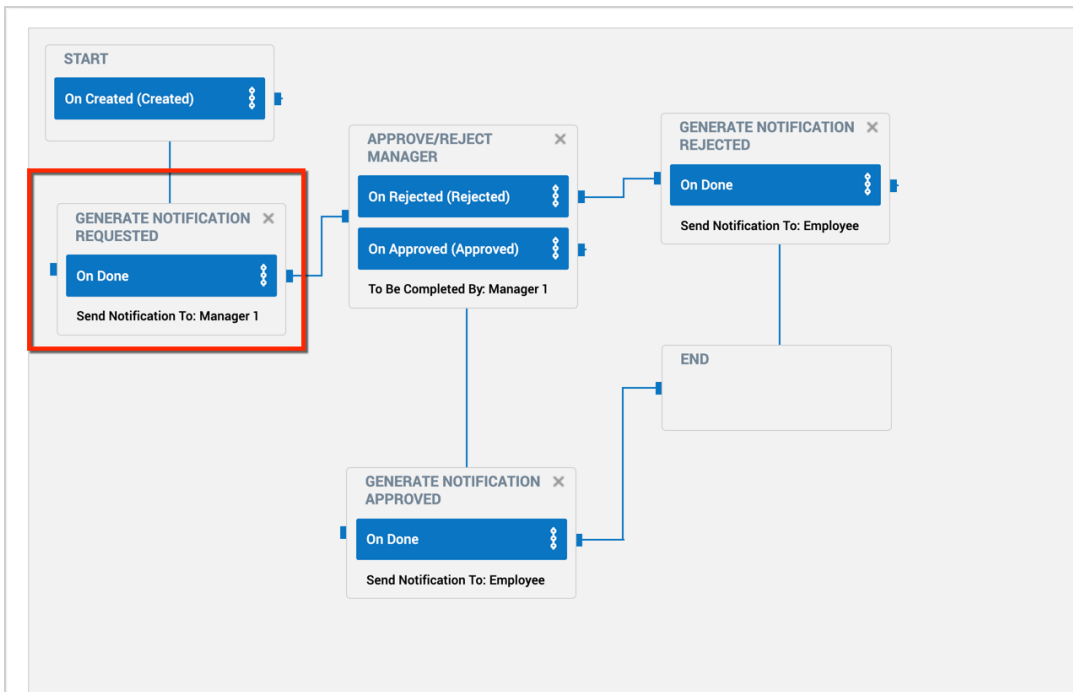
{COMMENT}

{COMPANY_NAME}

{COMPANY_SHORT_NAME}

Two-Way SMS in Workflows

When using workflows, users can leverage Two-Way SMS functionality when it comes to approvals or rejections of actions within the particular workflow. This is configured in the same place as mentioned above (in the Generate Notifications step). You will want to apply this to the notifications step that comes before the Approval/Reject Manager step.



As you click the SMS Enabled checkbox, you will see another option for Two Way SMS Enabled that will need to be checked.

Step Properties: Generate Notification

(COMPANY_SHORT_NAME)

Attachments

ADD

Delay Send For

0 Days

SMS Enabled

Two Way SMS Enabled

As the SMS Message text space appears, configure your message using free text and tags as normal.

Step Properties: Generate Notification

(COMPANY_SHORT_NAME)

Attachments

ADD

Delay Send For

0 Days

SMS Enabled

Two Way SMS Enabled

SMS Message

Hi (RECIPIENT_FIRST_NAME),

(REQUESTER_FULL_NAME) has requested (REQUESTED_TIME_OFF) on (DAY_REQUESTED) for (HOURS_REQUESTED) hour(s) with the following comment:

(REQUESTER_COMMENT)

Thanks!

If response is N, please add comment after code.

limit: 1400 characters. remaining: 1063

TAGS

Download Tags

(AMOUNT_WITH_UNIT_REQUESTED)

(CHANGES_MADE)

(CHANGES_MADE_BY_FIRST_NAME)

(CHANGES_MADE_BY_FULL_NAME)

(CHANGES_MADE_BY_LAST_NAME)

(COMMENT)

(COMPANY_NAME)

(COMPANY_SHORT_NAME)

Calendar Attachment Enabled

Send Notification To

Manager 1

When the workflow is triggered and the notification is sent, the manager will see the message as formatted by the user in configuration. This will immediately be followed by a canned set of instructions to explain how to advance the workflow: Please reply Y/N followed by this code <code> to Approve/Reject this request. The code is very important as this is a unique value tied to each request. As a manager, you could receive multiple requests for one workflow and the system needs to know which specific request is being approved or denied.

Hi Tim,

Anna Renee Watson has
requested Vacation on
10/06/2020 for
8:00 hour(s) with the following
comment:

Thanks!

If response is N, please add
comment after code.
Please reply Y/N <space>
followed by this code 82434 to
Approve/Reject this request
Reply STOP on +13173427186
to unsubscribe.

There is error proofing built into this process as well. If an incorrect code is entered, the system will let you know (similarly if you enter the same code twice).

Two-Way SMS Workflows: Required Comment

You can configure a Workflow to allow for a SMS response to Approve or Reject, plus any required Comment, so that users can Approve/Reject a Workflow that includes a Comment and submit it via SMS. When the Workflows listed below are sent through SMS Two-Way, the user is notified that a Comment is required in addition to their Approve/Reject and unique code.

- Time Off Request
- Timesheet
- Timesheet Change Request
- Schedule
- Schedule Open Shift
- Schedule Request for Coverage
- Schedule Shift Swap
- Compensation Proposal Request

SMS in Recruitment

If you are using the Recruitment marketplace product, SMS communication can be configured in communication templates. This will allow managers, hiring managers, and HR professionals to communicate with applicants via SMS messaging.

Communication Templates

Communication Templates can be selected by the manager or HR professional when communicating with an applicant. The communication templates are located at **Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Communication Templates**. The **SMS Enabled** checkbox will be unchecked by default. Check to activate the SMS messaging options.

Tip: Make sure to check the Active checkbox in the notification to make it available.

Applicant Communication Template

Template Description

Name:

Description:

Active: ☐

Global: ☐

Recipients

	Applicant	User	Email	Append CC	Append BCC
<input checked="" type="checkbox"/>	Applicant			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	User	<input type="text" value=""/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Email	<input type="text" value=""/>		<input type="checkbox"/>	<input type="checkbox"/>

Recipients (Cc)

☐ Email:

Recipients (Bcc)

☐ Email:

Email/Mailbox Message

Email/Mailbox Enabled: ☒

From:

Subject:

Message:

Dear (ACCOUNT_FIRST_NAME),
(CURRENT_DATE)
Thank you for application and interest in Kronos, Inc. You have been selected to move on to the interview phase of our selection process. Someone from our office will contact you to set up a date and time for an interview. If you are no longer interested in this position, please respond to this email so that we may remove you from the candidate list.
Thank you and best regards,
Human Resources Department

Attachments:

Calendar Attachment Configuration

Calendar Attachment Enabled: ☐

SMS Message

Enabled: ☒

Message:

Tags

Download Tags

- (ACCOUNT_ADDRESS_NUMBER)
- (ACCOUNT_ADDRESS_NUMBER_ADDITION)
- (ACCOUNT_CELL_PHONE)
- (ACCOUNT_CITIZEN_SERVICE_NUMBER)
- (ACCOUNT_CITY)
- (ACCOUNT_COUNTRY)
- (ACCOUNT_FIRST_NAME)

Communications with Applicants

When managers or HR professionals choose to communicate with an applicant, they can choose one of the preconfigured communication templates or create a customized message. Managers can communicate with applicants in the following areas:

- **Team > Recruitment > Candidates > Applicants**
- **Team > Recruitment > Candidates > Job Applications**

In both areas, users will select one or more applicants or job applications and select the **Communicate To Selected** button. In the pop-up, you can select a communication template from the **Template To Use** icon. When selecting a template, it will populate the Email area (if enabled at the company level), and the SMS area with content from the template. Users can edit as needed.

If not using a template, users can create their own customized messages and use system tags to complete the message.

Applicants and Job Applications

After selecting one or more entries and clicking the **Communicate To Selected** button, the pop-ups will allow you select a template, create customized messages, or turn off/on certain communication methods.

Communicate: 2 Applicant(s)

X

JUMP TO
Email
SMS

Email

☒ Send Email Communication
[Template To Use](#)

Select Template

From *

Please Enter E-Mail

Subject *

Subject

Message

B I U S T L R A Times New Roman 12pt

A

ADD TAGS

Communicate: 2 Applicant(s)

JUMP TO
Email
SMS

B I U S | Ix | ||| Times New R... 12pt
✂️ 📎 | :|: | ||| " | ↶ ↷ | 🔗 🔄 🖨️ 📷 ▶️ <> 🏠
A ▼ 🖋️ ▼

ADD TAGS 📎

SMS
☒ Send SMS Communication

Message limit: 1400 characters. remaining: 1400

ADD TAGS

Job Requisitions and Applicant Information

When opening a Job Requisition for viewing or editing, an option is available to **Notify Applicant** which is a manual method of encouraging an applicant to apply for the job. After selecting the option and adding an applicant, a communication pop-up will display where you can craft a communication to the applicant. You can select a communication template or create a customized message. The options available here will depend on what was selected on the **Company Setup** page (Email, SMS, etc.).

Job Requisitions are located under **Team > Recruitment > Job Requisitions**.

The screenshot shows a 'Communicate: 1 Applicant(s)' modal window. It has two tabs: 'Email' and 'SMS'. The 'SMS' tab is selected, showing a 'Send SMS Communication' toggle (checked), a 'Message' field with a character limit of 1400, and a 'Send' button. The background shows the 'Job Requisition' page with a sidebar menu and a 'Requisition Details' section.

When viewing or editing an applicant, the **Applicant Information** page will open and contains multiple tabs and **Jump To** links. On the **Communications** tab, you can select various communication options. In the **Interviews** widget, in the Actions ellipses, you can add an interview (if none are listed). Once added, the Actions ellipses in the entry will have the **Communicate** option. When selected, a pop-up will display. This pop-up contains the SMS option, as well as the iCalendar Attachment option. The options available here will depend on what was selected on the **Company Setup** page (Email, SMS, etc.)

If there are multiple options in the lists, and you want to send the same communication to all selected, you can select the entries and then click the **Communicate** button on the page.

Applicant Information is located under **Team > Recruitment > Candidates > Applicants**. Then open/view an applicant from the list.

The screenshot shows the 'Applicant Information' page for John Anson. The 'Communications' tab is active, showing a table of 'Interviews' and a section for 'Applicant Communications'. The 'Interviews' table has columns for Interview Date, Status, Type, From, To, Location, Comments, Participants, Notes, and Actions. The 'Applicant Communications' section has a table with columns for Type, Description, Attachments, Added By, and Added On. A 'Communicate' button is visible in the Actions column of the Interviews table.

Send Applicant Communication: John Anson

×

JUMP TO

Email

SMS

ICalendar Attachment Configuration

SMS

☒ Send SMS Communication

Message limit: 1400 characters. remaining: 1400

ADD TAGS

ICalendar Attachment Configuration

☒ ICalendar Attachment Enabled

☐ Send As Appointment

Summary

In the pop-ups, you will have the option to turn off or on each area of communication via the slider bubble.

On

SMS

☒ Send SMS Communication

Message limit: 1400 characters. remaining: 933

{CURRENT_DATE}

 Dear {ACCOUNT_FIRST_NAME},

 Thank you for application and interest in Kronos, Inc. You have be

Off: The content will remain, but will be grayed out.

SMS

☐ Send SMS Communication

Message limit: 1400 characters. remaining: 933

{CURRENT_DATE}

 Dear {ACCOUNT_FIRST_NAME},

 Thank you for application and interest in Kronos, Inc. You have been selected

Tip: If iCalendar Attachment is enabled within any of these areas, an iCalendar attachment will be delivered with the notification in the form of an MMS message.

Broadcast Messaging

Broadcast messaging is a form of communication that allows administrators and managers to send messages to employees en masse. While this form of communication is intended for multiple recipients, it can also be used to send messages to single recipients. Templates can be defined and applied to make creating and managing communications easier.

If you have enabled and are using Broadcast Messaging, there are options to send these communications via SMS.

Tip: Broadcast Messaging is enabled within the **Mail Settings** widget on the **Company Info** tab under **Company Settings > Global Setup > Company Setup**.

Broadcast Messaging Templates

Within the templates, messages can be defined in the SMS Message text box. SMS messages are limited to 1400 characters and if copying messages from the Email/Mailbox area, the formatting will not be retained in the SMS Message area.

An iCalendar attachment and appointment can be defined and is supported for SMS messages.

The screenshot displays the 'Broadcast Message Templates' configuration interface. It includes a 'Name' field, a 'Description' field, and an 'Active' checkbox. The 'Recipients' section allows selecting 'Employee', 'User', or 'Email'. The 'SMS Message' section, highlighted with a red box, contains a text area for the message, a 'TAGS' list, and a character count. The 'iCalendar Attachment Configuration' section is at the bottom.

Broadcast Messaging: Security Permissions

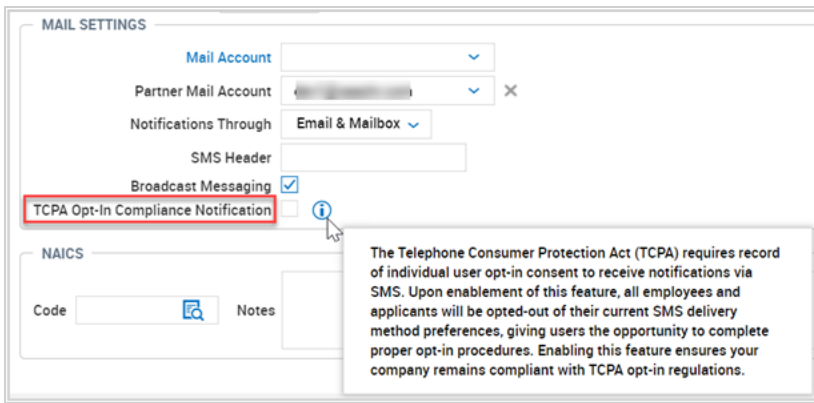
You can restrict certain users or security profiles from being able to create or send Broadcast Messages. A security item titled **Send Broadcast Communication** is located on the HR Tab, in the Employee Related Functions widget of the security profiles.

If this security item is enabled, the user has the **Communicate** button displayed as an option on the Employee Information screen and any other applicable screens. If this item is disabled, the user does not have the **Communicate** button as an option.

Company Setup SMS Opt In Procedure

Companies with SMS Integration with Twilio already enabled must have record of employees opting in to receive notifications via SMS to be compliant with the Telephone Consumer Protection Act (TCPA) opt-in regulations. An option in the **Mail**

Settings section allows existing companies with Twilio Integration enabled to become compliant.



MAIL SETTINGS

Mail Account [dropdown]

Partner Mail Account [dropdown] X

Notifications Through Email & Mailbox [dropdown]

SMS Header [text input]

Broadcast Messaging ☒

TCPA Opt-In Compliance Notification ☐ ⓘ

NAICS [text input] [icon] Notes [text area]

The Telephone Consumer Protection Act (TCPA) requires record of individual user opt-in consent to receive notifications via SMS. Upon enablement of this feature, all employees and applicants will be opted-out of their current SMS delivery method preferences, giving users the opportunity to complete proper opt-in procedures. Enabling this feature ensures your company remains compliant with TCPA opt-in regulations.

The checkbox, **TCPA Opt-In Compliance Notification**, can be enabled under **Global Setup > Company Setup > Company Info** tab, in the **Mail Settings** section. For companies that already have the Twilio Marketplace Product added, the checkbox is unchecked. When checked, a pop-up notification provides the following text:

Are you sure you want enable this feature? Upon enablement of this feature, all employees and applicants will be opted-out of their current SMS delivery method preferences, giving users the opportunity to complete proper opt-in procedures.

When the feature is enabled, the company does not have an option to disable it. After the feature is enabled, all users are opted out. An **Announcement: Opt-In to SMS Notifications** pop-up is shown upon the next login for each employee, including new accounts. The pop-up explains:

You are currently opted-out of SMS notifications. Please navigate to your [notification preferences] screen to opt-in.

SMS Opt In Procedure for New Companies

Companies using SMS to communicate to their employees need to gather consent from each employee to send them text messages. When SMS is enabled on a Company Account via Twilio integration, all employee accounts including applicants and future hires default to SMS disabled until the employees OPT IN to receive text messages in their Notification Preferences.

Notification Burst When TCPA is Enabled

When the **TCPA Opt-In Compliance Notification** checkbox is enabled in the Company Setup, all existing applicants are opted out of the SMS notification preference. To ensure applicants are aware that they are opted out and to provide them with steps to opt-in, a notification is sent automatically when the TCPA option is enabled. Applicants receive a notification via email when:

- The company has enabled the TCPA checkbox in the Company Setup.
- The applicant had SMS checked in his/her/their notification preference and is now opted-out.

The automatic notification that is triggered when the **TCPA Opt-In Compliance Notification** option is selected, **Applicant SMS Opt-out**, is enabled by default (**Company Settings > Global > Notifications**), and can be cloned or deleted.

Note: TCPA Opt-In Compliance is not supported for demo company snapshots. If a snapshot of a demo company is created before the Opt In procedure is in place, and the company decides to reload the snapshot after the procedure is set up, the **TCPA Opt-In Compliance** checkbox and user SMS preferences remain unchanged.

Important: When Administrators create a new company using Company Copy or Remote Company Copy, the users' SMS notification preferences are not copied to the new company. This prevents a scenario where a user is Opted In by default when a new company is created using a Company Copy.

Individual User Opt-In for SMS Delivery Method

Companies using SMS to communicate with their employees need employees to consent to receiving SMS to be compliant with TCPA regulations. Each employee can OPT IN to receive notifications through the SMS delivery method. If a user wishes to receive notifications via the SMS delivery method, the user can navigate to the **Notification Preferences** screen and opt-in by enabling the **SMS Delivery Method** checkbox (**My Info > My Information > Notification Preferences**).

If a user has not already opted-in and the user does not have a cell phone or country code added to their profile, the **SMS** checkbox appears unchecked. The user has the option to add their cell phone, and a message displays stating **To make SMS available, edit your personal information to add your cell phone and country code**. The message includes a link to the employee's personal information.

If the employee has Edit permissions for the **ESS Cell Phone** security item in their assigned security profile, they can opt in by enabling the **SMS Delivery Method** checkbox. If the employee does not have Edit permissions, the system checks if the company has at least one HR Action configured that includes a **Cell Phone** action item. If the company does, the system confirms that the employee has initiate permissions for at least one HR Action with the **Cell Phone** action item. If so, the employee is directed to **My HR > HR Actions** to submit a request to add the cell phone.

Warning: Phone numbers must be entered as the full numeric phone number without any special characters (no dashes or parentheses) or spaces. For example, +1 5552345678.

When the user has a cell phone added to their profile, the **SMS** checkbox becomes editable.

Reminder: When a company enables SMS, all employees within the company default to SMS disabled. Users must navigate to their **Notification Preferences** page to OPT IN to receiving notifications via the SMS delivery method.

As part of the Opt In procedure, each user is sent a six digit confirmation code that must be entered back into the application. Users can then enter the code into the input boxes in the **Verify Your Phone Number** dialog box.

SMS Opt In for Applicants

Applicants can consent to receiving SMS notifications to ensure compliance with TCPA regulations. Each applicant can Opt In to receive notifications via the SMS Delivery Method. When the **TCPA Opt-In Compliance Notification** option is enabled, users see an enabled **SMS** checkbox when the proper permissions are configured for the applicant and the cell phone/country code are available.

The message under the SMS checkbox in Notification Preferences reads: **To make SMS available, edit your applicant profile to add your cell phone and country code**. The words "applicant profile" in the message are a link, and clicking on it takes the applicant to the My Applicant Profile page where, if necessary, they can edit the profile to add the cell phone details.

Warning: Phone numbers must be entered as the full numeric phone number without any special characters (no dashes or parentheses) or spaces. For example, +1 5552345678.

Users can select the **SMS** checkbox if needed. When they do, a pop-up for **Verify Your Phone Number** opens. Choosing **Send Code** generates a message that says **Sending Code**. If the user closes the pop-up before the code is successfully verified, then the **SMS** checkbox remains unchecked. If the phone is successfully verified, the **SMS** checkbox is enabled.

SMS Opt-In Via Quick Apply or Apply with Seek

Where the **TCPA Opt-In Compliance Notification** is enabled, applicants can Opt In to SMS notifications when using the Quick Apply or Apply with Seek features. Applicants applying for a job using Quick Apply or Apply with Seek can click on **Apply** after entering all valid details and questionnaires (no errors exist). When the job application is submitted successfully, the Completed message displays. When the applicant clicks **OK** on the Completed message, a pop-up displays and asks:

Notify you of update via text messages (SMS)?

Another pop-up then allows the applicant to verify their phone number. Once the number is verified, the applicant can choose the **Send Code** option. An error message displays if the code was not sent, and a success message displays when the code is sent successfully. Once it is received, the applicant can enter the code and click the **Verify** option to complete the Opt In process.

SMS Delivery Preferences Report

A **SMS Delivery Preferences** report captures Opt-In/Opt-Out activity for all account types and is available in both Admin companies and Client companies. This allows companies to see the status of SMS opt-ins and opt-outs, perhaps for the purpose of tracking that SMS messages were sent during opt-in periods.

This report allows companies to verify that they gathered the proper consent to send out SMS notifications to their applicants and employees. This report was previously available for Partner Resellers and is available for customers via the paths below.

- Partner Resellers: **Reports > Marketplace Reports > Twilio > SMS Delivery Preferences**
- Customers: **My Reports > Marketplace Reports > Twilio > SMS Delivery Preferences**

Security: A **SMS Delivery Preferences** security item, located in the security profiles under **Reports > Marketplace Reports**, is available to enable for the appropriate users. When this item is enabled for the security profile assigned to a user, the report becomes available in the menus.

Important: This report only captures Opt In/Opt Out behavior moving forward from when the report is made available. Past Opt In/Opt Out data is not captured in the report.

Assigning Broadcast Messages to Employees

Assigning employees to a Broadcast Message is done from the Employee Information report page. Select one or multiple employees and then select the **Communicate** button.

Employee Information

HIRE TERMINATE REHIRE **COMMUNICATE** VIEW ...

Page 1 of 15 1 - 10 of 144 Rows Saved: Test closed filters Columns (1) (1)

	Employee Id	Badge	Username	First Name	Last Name	Employee EIN	In Payroll	Locked	Units	Dis
	starts with	=	=	starts with	starts with	starts with	All	All	=	=
<input checked="" type="checkbox"/>	0006		tbrady	Tom	Brady	Kronos - Lowell	Yes	No	Amount	Pr
<input checked="" type="checkbox"/>	0014		monique	Monique	z	Kronos - Lowell	Yes	No		
<input checked="" type="checkbox"/>	0016		jlewis	John	Lewis	Kronos - Lowell	Yes	No		
<input type="checkbox"/>	0017		paul	Paul	Quis	Kronos - Lowell	Yes	No		

On the pop-up, you can manually create an SMS message and system tags are available. If you have created templates, this is where you apply them. Once a template is selected and applied, you will still have the option to edit the text or enable/disable communication methods and also enable the iCalendar attachment.

When enabling a calendar appointment, you must set the When/From/To parameters for the appointment.

When sending out a Broadcast Message to employees, the option to specify when to send (Date and Time) the message is available in the Schedule section.

Schedule

☐ Send Immediately

☒ **Send as of**

Date * Time *

mm/dd/yyyy hh:mm am

When ready, select the **Send** button and the SMS message will go out to the recipient(s).

Communicate: 7 Employee(s)

JUMP TO
[Email](#)
[SMS](#)
[iCalendar Attachment Configuration](#)

SMS

☒ Send SMS Communication

[Template To Use](#)

Select Template

Message limit: 1400 characters. remaining: 1115

{ACCOUNT_FULL_NAME},

OPEN ENROLLMENT

This is a reminder that your benefit enrollment form must be completed and submitted to HR no later than Dec. 5, 2020. Please ensure you make selections on each page and each category, even if you are selecting the same plans as last year.

ADD TAGS

iCalendar Attachment Configuration

☒ iCalendar Attachment Enabled

☒ Send As Appointment

When * From * To *

11/30/2020 10:00 am 11:00 am

Summary

Complete Benefits Enrollment

Description

Reminder that Benefits Enrollment is due by Dec. 5, 2020.

CANCEL SEND

System Generated SMS Report

Users with the appropriate security settings can view the history of outgoing SMS communications within their company to allow for proper accounting. The System Generated SMS report is available under **My Info > My Reports > Marketplace Reports > Twilio > System Generated SMS**.

This report is only visible if the **SMS Integration with Twilio Marketplace** app is added to the company. In addition, users must have the **System Generated SMS Report** security item enabled in the **Marketplace Reports** section on the **Reports** tab in their assigned Security Profile.

← System Generated SMS

Rows On Page: 20 2 Rows Refresh Data

Date Created: Calendar Range All Filter Settings Select Columns Export

Page	Account Id	Type	Event Type	From Number	To Number	Body	Created	Time Sent	Status	Delivery Error Code	Delivery Error Description	Time Delivered
<input type="checkbox"/>	2397359	MMS	BROADCAST	NA	+116789372872	<p>10-26-2020 05:35p</p> <p>Hello John,</p> <p>An All Hands Company Meeting has been scheduled for November 15, 2020. This is a webinar and microphones will be muted. Questions can be typed in the Comments. Please click the link below to register.</p> <p>[Insert URL] Placeholder</p>	10-26-2020 05:35p	10-26-2020 05:50p	FAILED	20404		
<input type="checkbox"/>	2397372	MMS	BROADCAST	NA	+1682692152	<p>10-26-2020 05:35p</p> <p>Hello Monique,</p> <p>An All Hands Company Meeting has been scheduled for November 15, 2020. This is a webinar and microphones will be muted. Questions can be typed in the Comments. Please click the link below to register.</p> <p>[Insert URL] Placeholder</p>	10-26-2020 05:35p	10-26-2020 05:50p	FAILED	20404		

User Generated SMS Report

Users can view the history of responses to SMS Communications within their company for proper accounting using the User Generated SMS report under **My Info > My Reports > Marketplace Reports > Twilio > User Generated SMS Report**.

This report is only visible if the SMS Integration with Twilio Marketplace item is added to the company. In addition, users must have the **User Generated SMS Report** security item enabled in the **Marketplace Reports** section on the **Reports** tab of their assigned Security Profile to access this report.

Partner Resellers Only: System Generated SMS Report

In the System Generated Emails report, a new default column titled **Event Type** has been added that will display the specific type of method used for the message (for example: Broadcast, HR Action Request, etc.).

More Information on SMS Integration

The following sections cover some extra information for users of SMS integration.

Samsung Users

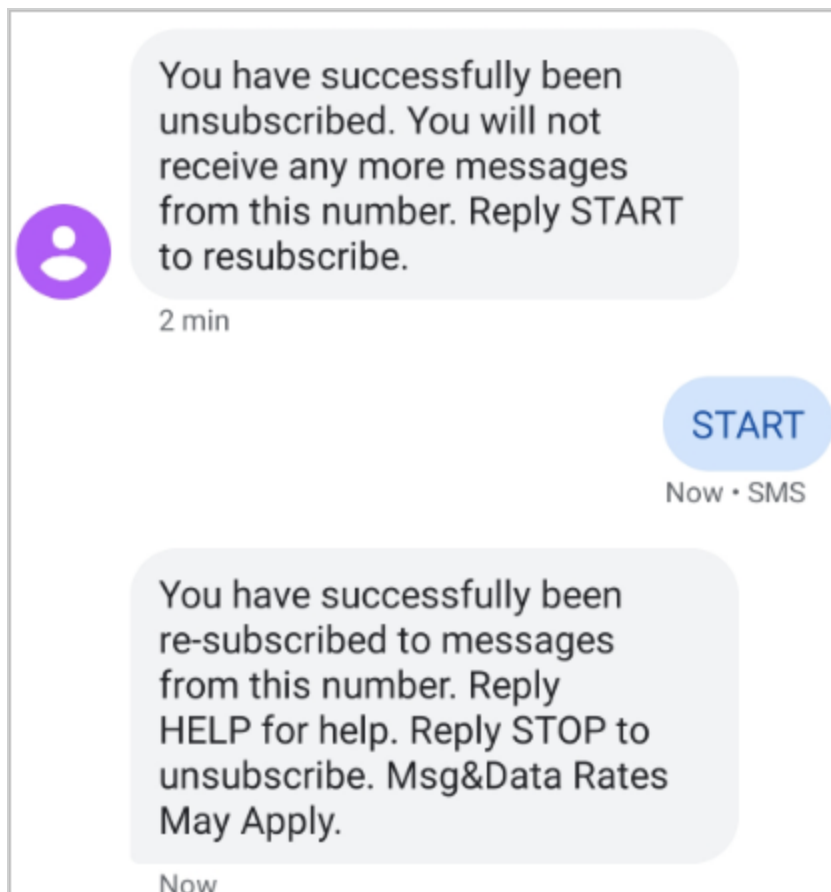
iCalendar attachments in messages can only be sent by Workforce Ready as .ics files, and Twilio only supports the delivery of .ics files. The default **Messages** app on Samsung devices only supports .vcs file attachments. iCalendar attachments sent from Workforce Ready will not be visible in the default **Messages** app on Samsung devices. To receive iCalendar attachments from Workforce Ready, it is recommended that you download **Android Messages** from the app store and use as your default Messages app.

Data Retention Users

If you use Data Retention to purge sensitive information from your databases, a **System Generated SMS** data type will be available. If data is hard-deleted, it can be tracked in the execution history.

Subscribe Responses From SMS Text

When recipients receive an SMS text, they will have the option to unsubscribe by responding with STOP. They will have the option to resubscribe by replying with START. If they resubscribe, they will receive a confirmation message from Twilio indicating they are subscribed again.



When users receive an SMS text message to approve or reject a request, and the request is rejected and requires a comment as to why, the instructions in the text message will clearly instruct the user how to respond and allow them to enter the comment in the text message.

Example: The Outgoing Message looks like this:

Please reply Y/N followed by this code 73756 to Approve/Reject this request. If N, please also provide a brief comment.
Reply STOP on +13173427186 to unsubscribe.

Example: The Response/Reply looks like this:

N 76542 Employee no longer eligible at this time.

Two-Way SMS Messages for Scheduler

For companies with the Scheduler module enabled, some of the items that can be sent via SMS text messaging require additional details in addition to the approve/reject.

These items contain additional details related to the request.

Example: Here is an example:

Please reply Y/N <space> followed by this code 11234 to Approve/Reject this request. Please note that the reply will automatically be applicable to the first Peer to Approve Peer request. Please login to WFR to change peers/modify this request.

This applies to **Schedule Open Shift**, **Schedule Request for Coverage**, and **Schedule Shift Swap** items.