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WORKFORCE **TXT**®  
EMPLOYEE TEXT MESSAGING

# WorkforceTXT User Guide

*Uploading contacts, creating and  
distributing campaigns*





# Log in to the WorkforceTXT platform

- Visit <https://workforcetxt.com/#/login>
- Log in with your email address and password
- If this is your first visit, the platform will automatically request a password change upon logging in

**NOTE: Make sure to save this new password for your records. If you forget your password, contact your account team representative.**



# Create groups or populations & upload contacts

## To create employee groups:

- Click on **Contacts** in the top navigation bar, then **Settings**.

## To upload contacts:

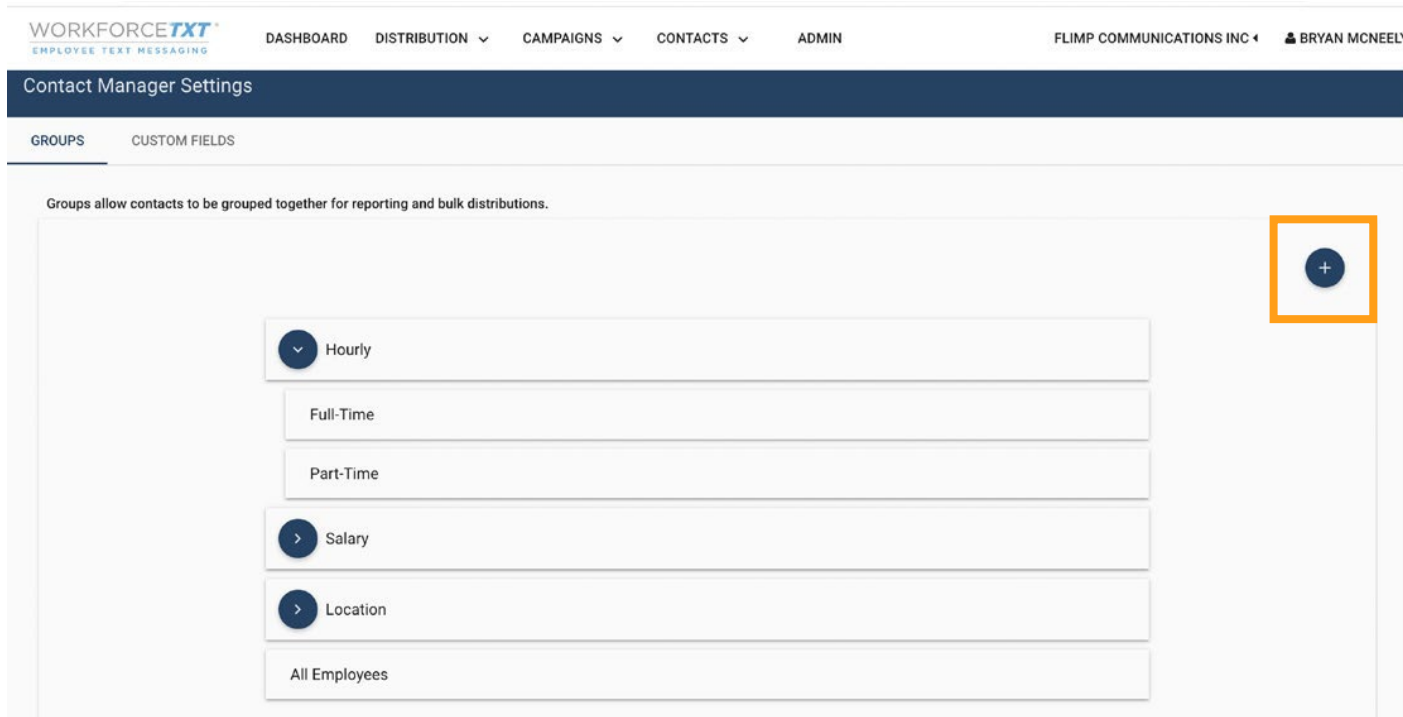
- Click on **Contacts**, then **Contact Book**.

The screenshot displays the WorkforceTXT dashboard interface. At the top, the navigation bar includes 'DASHBOARD', 'DISTRIBUTION', 'CAMPAIGNS', 'Contact Book', 'Analytics', and 'Settings'. The 'Contact Book' and 'Settings' items are highlighted with orange boxes. The user is logged in as 'NATALIE MACY' under 'FLIMP COMMUNICATIONS'. The main dashboard area is titled 'Dashboard' and shows an 'Activity Dashboard' for the period '9/7/22 - 9/14/22'. There are two main sections: 'SMS' and 'Consent Management'. The 'SMS' section includes buttons for 'COMPOSE', 'BULK UPLOAD', and 'VIEW LOG', and displays metrics for 'Attempted' (1), 'Delivered (100.0%)' (1), 'Error (0.0%)' (0), 'Undelivered (0.0%)' (0), 'Scheduled' (0), and 'Received' (34). The 'Consent Management' section includes a 'CONTACT BOOK' button and displays metrics for 'Total Opted In (68%)' (25), 'Total Opted Out (30%)' (11), and a summary of 'Total Contacts' (37), 'NA Consent' (3%), 'Pending Consent' (0%), and '0%'.

# Adding a new group

## To add a new group:

- On the Groups tab, click the "+" symbol to add a new group.
- You can also create sub-groups to further segment your employees
  - Example: create sub-groups for Hourly and Salaried employees to send texts to a specific population



The screenshot displays the 'Contact Manager Settings' page in the WorkforceTXT interface. The top navigation bar includes 'DASHBOARD', 'DISTRIBUTION', 'CAMPAIGNS', 'CONTACTS', and 'ADMIN'. The user is identified as 'BRYAN MCNEELY' from 'FLIMP COMMUNICATIONS INC'. The 'GROUPS' tab is selected, and a '+ ' button is highlighted with an orange box. Below the '+ ' button, a list of groups is shown:

- Hourly
  - Full-Time
  - Part-Time
- Salary
- Location
- All Employees

# Uploading contacts

- You can upload a single contact or upload contacts in bulk by clicking on the corresponding icon

The screenshot displays the WorkforceTXT Employee Text Messaging interface. The top navigation bar includes 'DASHBOARD', 'DISTRIBUTION', 'CAMPAIGNS', 'CONTACTS', and 'ADMIN'. The user is logged in as 'ASSOCIATION DEMO' and 'NATALIE MACY'. The main header shows 'Filter' and 'Contact Manager'. On the left sidebar, there is a 'REFRESH DATA' button, search options for 'Contact Name' and 'Search Text', and toggle switches for 'All Group Options' and 'All Consent Options'. An 'EXPORT' button is also present. The main content area features a table with columns: 'First Name', 'Last Name', 'Phone Number', 'Email Address', and 'Consent Status'. The table is currently empty. In the top right corner of the table area, three icons are highlighted with an orange box: a plus sign with two people, a plus sign with one person, and a plus sign with three people. A tooltip labeled 'Upload Contacts' is visible below these icons. At the bottom of the table area, there are pagination controls showing 'Page: 1', 'Rows per page: 10', and '0 - 0 of 0'.

# Using a CSV file to upload contacts in bulk

- Download the WorkforceTXT CSV template to quickly upload contacts in bulk
- **Note:** The CSV file includes the required headers, which must remain even if you aren't uploading names and/or email addresses.
  - You must delete rows without phone numbers prior to uploading — there cannot be any blank spaces in the phone-number column.

Contacts Bulk Upload ×

Step 1: Download a CSV template to fill in

[Why do I need to use a CSV template?](#)

DOWNLOAD

Step 2: Select Contacts CSV file & Optional Contact Group

- All phone numbers imported must be in E.164 format which contains the following: [+][country code][area code][local phone number]. For example, USA (415) 123-1234 will be loaded as +14151231234.
- All records must be unique based on their phone number. Any duplicates will be removed during import.
- Where a contact already exists, their information will be matched using their phone number and updated with imported data.
- Processing of CSV files may take upwards of 10-15 minutes to complete depending on the amount of contacts.
- Please note that you may only upload a maximum of 4MB at a time. If you need additional capacity, please contact your customer service representative.

File to upload

Contact Group (Optional)

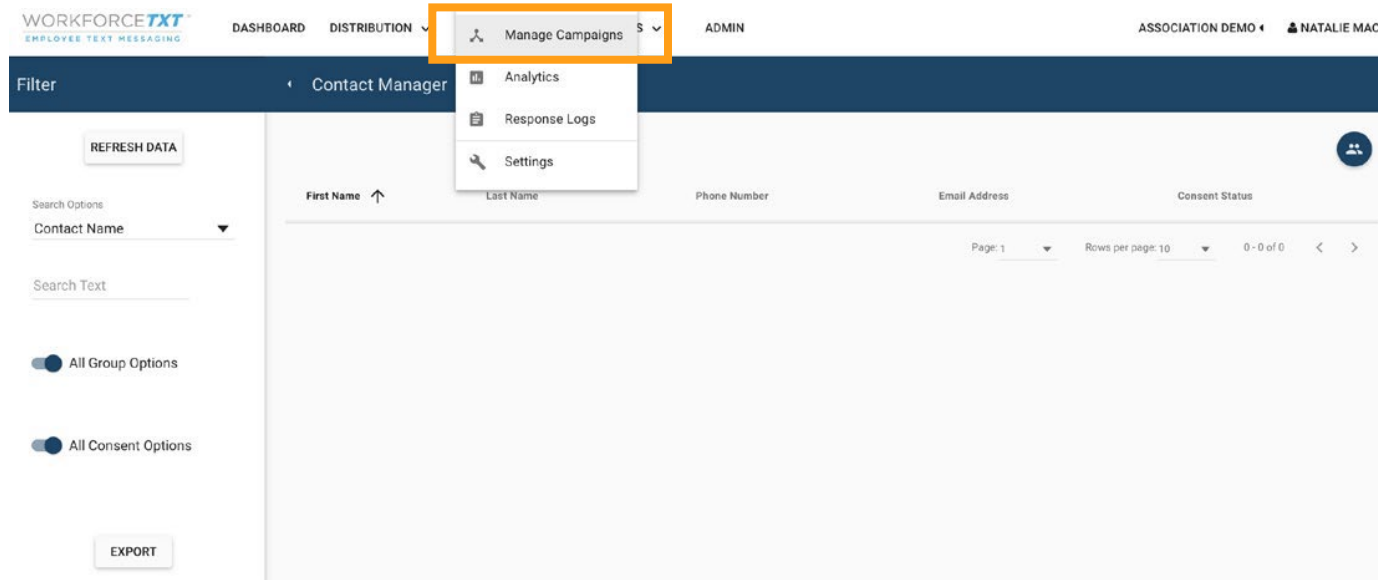
**Best practice!**



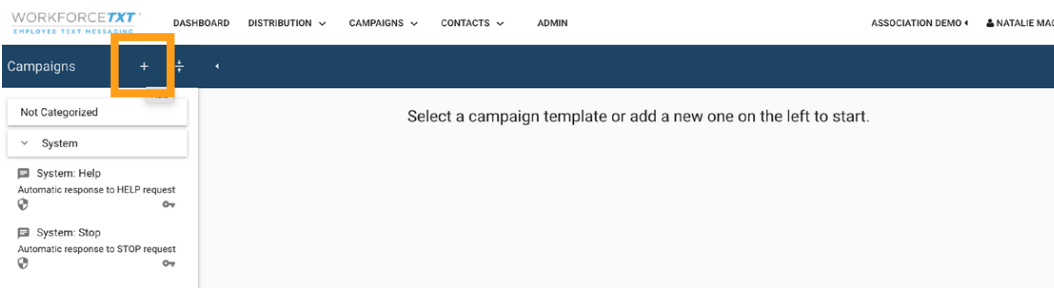
**Update your contact lists periodically, or every time you send a text, to account for any new hires or terminated employees.**

# Create your campaign (text message)

- To create your message, click **Campaigns** in the top navigation bar, then click **Manage Campaigns**



- Click on the “+” symbol to start a new message



# Messaging tips

- **Naming your message:** It helps to name your campaign with the distribution date, subject of the message and the employee group (if applicable)
- **Message body:** Each text can include up to 160 characters if it's GSM encoding (seen under the message body). Using symbols and accents may change the message to Unicode, which has a maximum of 70 characters per message.
- When finished with your message, click **Save**.

The screenshot shows the 'Add a New Message Template' form in the WorkforceTXT interface. The form is divided into two tabs: 'TEMPLATE' and 'ADVANCED'. The 'TEMPLATE' tab is active, showing the following fields:

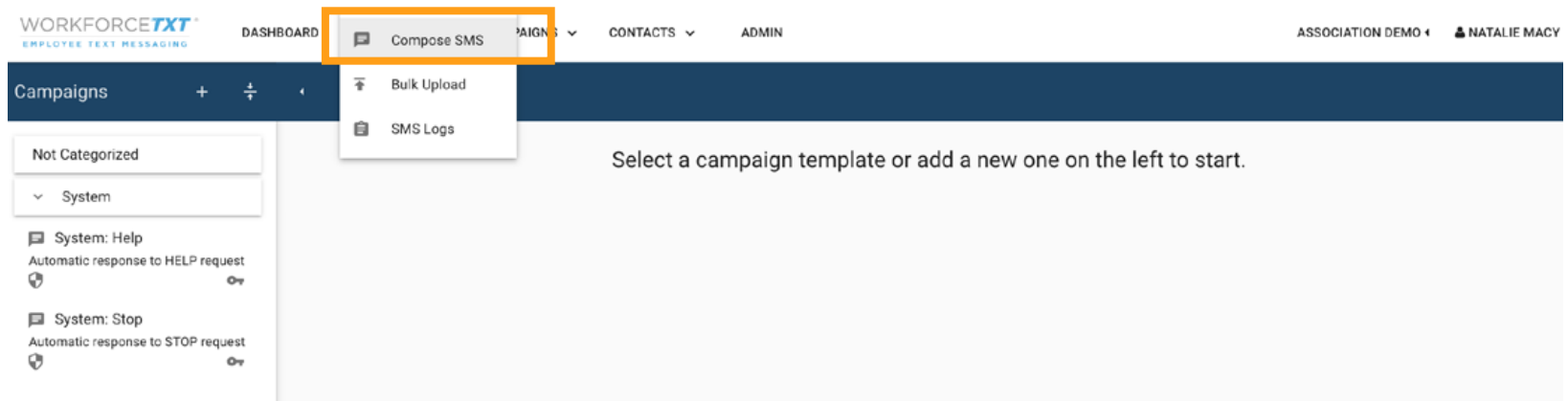
- Name\***: A text input field containing 'date, title, population' with a character count of 23/100.
- Message Type**: A dropdown menu set to 'SMS'.
- Category (Optional)**: A dropdown menu with a clear button (X).
- Description (Optional)**: A text input field.
- Message Body\***: A text area containing the instruction: 'This is where your message will go. You must type out full URLs; they cannot be hyperlinked.'

At the bottom of the form, there is a status bar indicating '93 Chars | 1 Segs | GSM Encoding' and a 'Show Details' link. Below the status bar are four buttons: 'ADD RESPONSE', 'DELETE', 'CANCEL', and 'SAVE'. The 'SAVE' button is highlighted with an orange border.



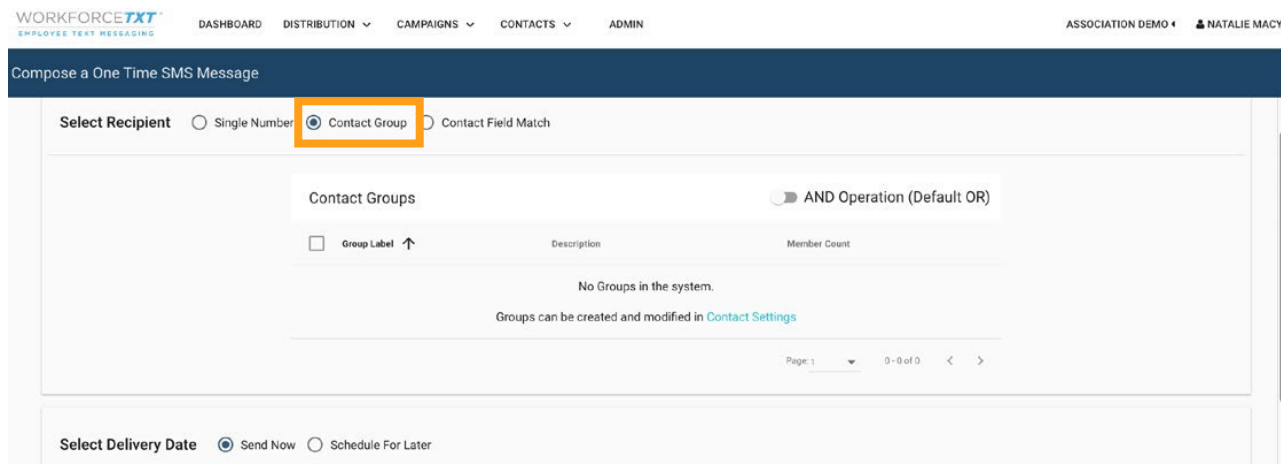
# Distributing campaigns/selecting recipients

- To schedule or send a campaign (message), click **Distribution** in the top navigation, then **Compose SMS**.



The screenshot shows the WorkforceTXT dashboard. The top navigation bar includes 'DASHBOARD', 'CAMPAIGNS', 'CONTACTS', and 'ADMIN'. The 'CAMPAIGNS' menu is open, and the 'Compose SMS' option is highlighted with an orange box. Below the navigation bar, there is a 'Campaigns' section with a list of templates, including 'System: Help' and 'System: Stop'. A central message reads: 'Select a campaign template or add a new one on the left to start.'

- Select recipient:** Click **Contact Group** and choose the group of contacts you want to send to.



The screenshot shows the 'Compose a One Time SMS Message' form. The 'Select Recipient' section has three radio buttons: 'Single Number', 'Contact Group' (which is selected and highlighted with an orange box), and 'Contact Field Match'. Below this, there is a section for 'Contact Groups' with a table header: 'Group Label', 'Description', and 'Member Count'. The table is currently empty, with the message 'No Groups in the system.' and a link to 'Contact Settings'. At the bottom, there is a 'Select Delivery Date' section with two radio buttons: 'Send Now' (selected) and 'Schedule For Later'.

# Select delivery date and send your campaign

- **Select delivery date:** Click **Send Now** to send the message right away or click **Schedule For Later** to send on a specific date and time. Time must be entered the following format: 00:00 AM (or PM).
- Select **Use a Campaign** and choose which campaign (text message that you created in the prior step) you'd like to send.
- Click **Send or Schedule**.

The screenshot shows a web interface for scheduling a campaign. At the top, there is a section titled "Select Delivery Date" with two radio buttons: "Send Now" (selected) and "Schedule For Later". Below this, there is a "Send On" field with a calendar icon, showing the date "11/1/2022" and a time field showing "01:00 PM". The timezone is set to "Mountain Standard Time".

Below the scheduling section, there is a section titled "SMS Message" with two radio buttons: "Write Message" and "Use a Campaign" (selected). Below this, there is a "Campaign \*" dropdown menu showing "Flimp Communications - Example Text Message". A note below the dropdown states "Only campaigns without custom fields are allowed".

Below the campaign selection, there is a "Campaign Body" field containing the text: "Hello! This is an example from Flimp Communications. To illustrate, here's a URL link and phone number: <https://flimp.live/FlimpDigitalPostcard> (888)-612-3881".

At the bottom right, there are two buttons: "RESET FORM" and "SCHEDULE". The "SCHEDULE" button is highlighted with an orange border.

# Confirm your information

- A pop-up window will appear to confirm the details: who the text is going to, when you're sending it and which campaign you've chosen.
- Click **Confirm** if all the information is accurate
- **Note:** You can refresh your dashboard after 15 minutes to make certain your campaign has been scheduled. (The dashboard includes only one week of metrics; go to **Scheduled** and change the dates for any metrics needed)

Confirmation ×

Please Confirm your Message

Recipient: Contact Group  
System: Opted In Status  
\*Using the OR operation

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Delivery: Now

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Message: Composed

CANCEL **CONFIRM**

The screenshot shows the WorkforceTXT dashboard for Flimp Communications Inc. The top navigation bar includes 'DASHBOARD', 'DISTRIBUTION', 'CAMPAIGNS', 'CONTACTS', and 'ADMIN'. The user is logged in as 'BRYAN MCNEELY'. The dashboard is titled 'Dashboard' and shows 'Activity Dashboard: 9/8/22 - 9/15/22'. There are two main sections: 'SMS' and 'Consent Management'. The 'SMS' section has buttons for 'COMPOSE', 'BULK UPLOAD', and 'VIEW LOG'. It displays metrics: 1 Attempted, 1 Delivered (100.0%), 0 Error (0.0%), 0 Undelivered (0.0%), 0 Scheduled, and 0 Received. The 'Consent Management' section has a 'CONTACT BOOK' button and displays metrics: 1 Total Opted In (100%), 0 Total Opted Out (0%), 1 Total Contacts, 0% NA Consent, and 0% Pending Consent.



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# You're all set!

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For more information about the WorkforceTXT platform, contact your account team representative.