CONNER STRONG & BUCKELEW

WORKFORCETXT®
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.

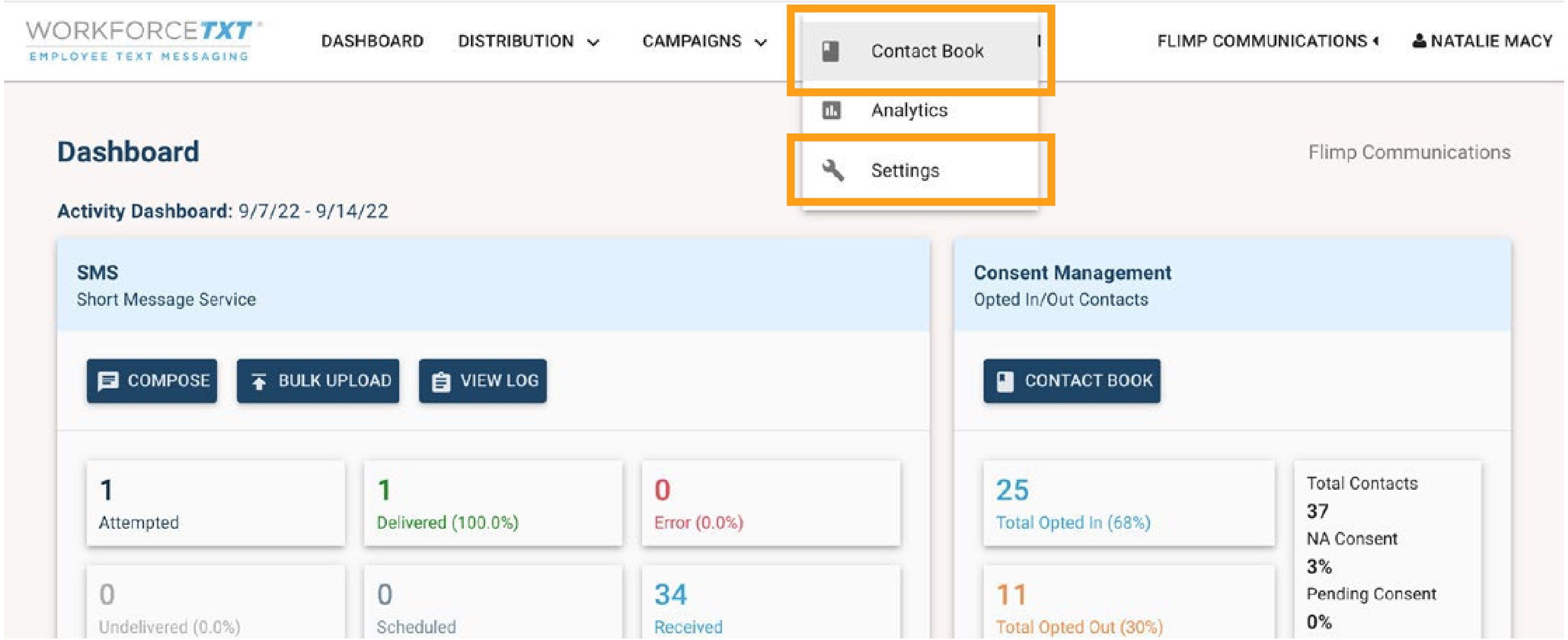
Create groups or populations & upload contacts

To create employee groups:

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

To upload contacts:

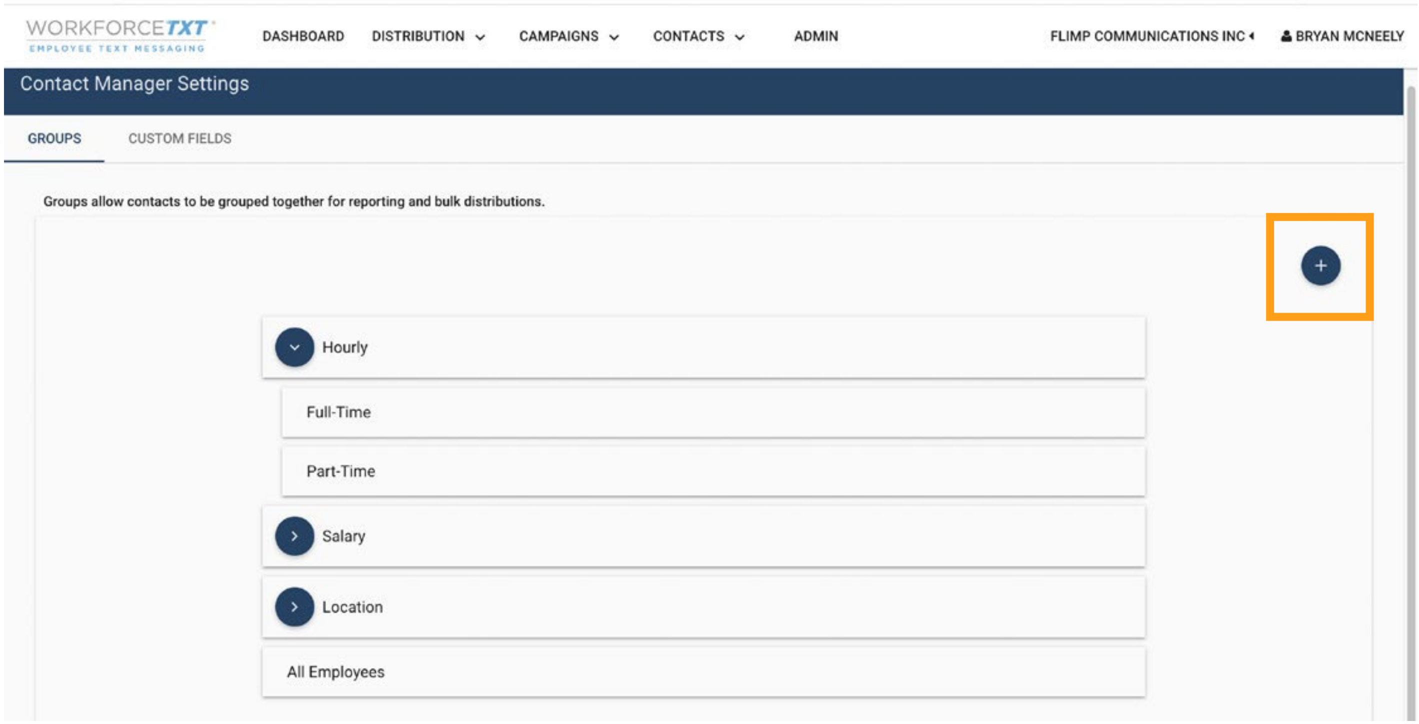
- Click on **Contacts**, then **Contact Book**.



Adding a new group

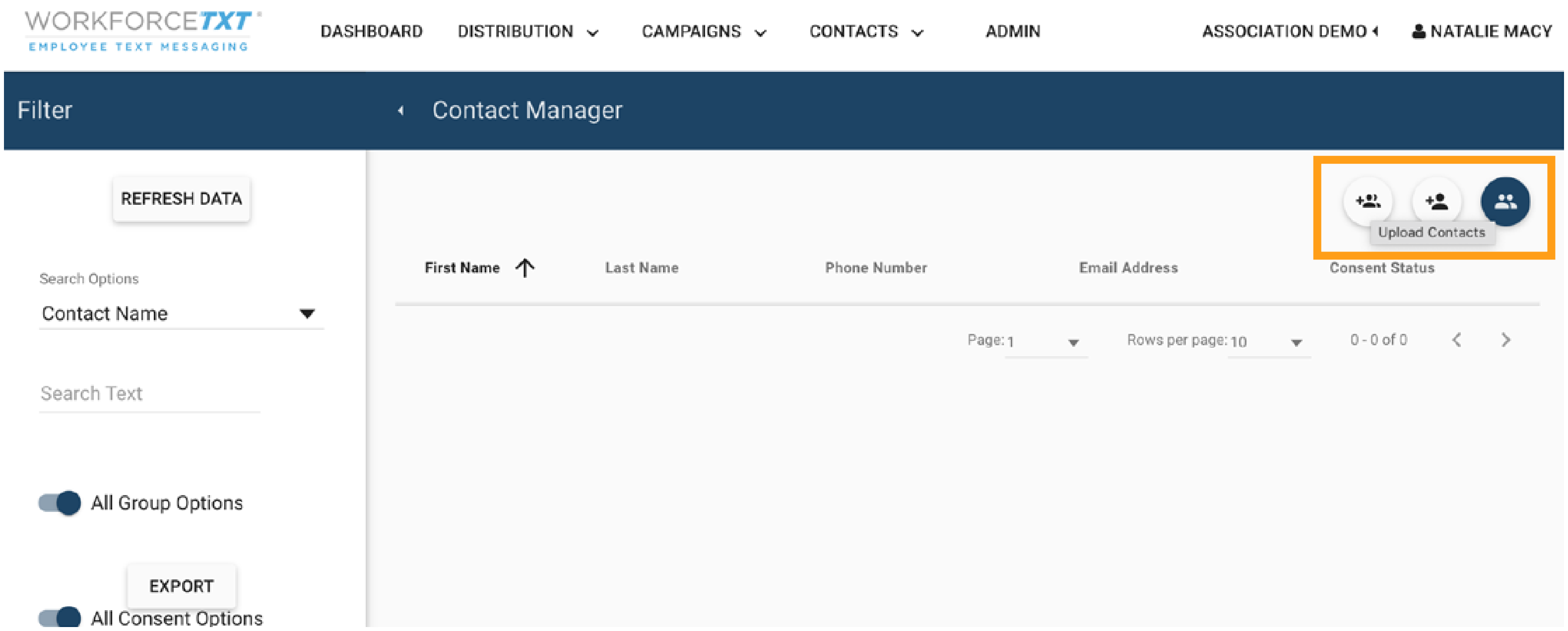
To add a new group:

- 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



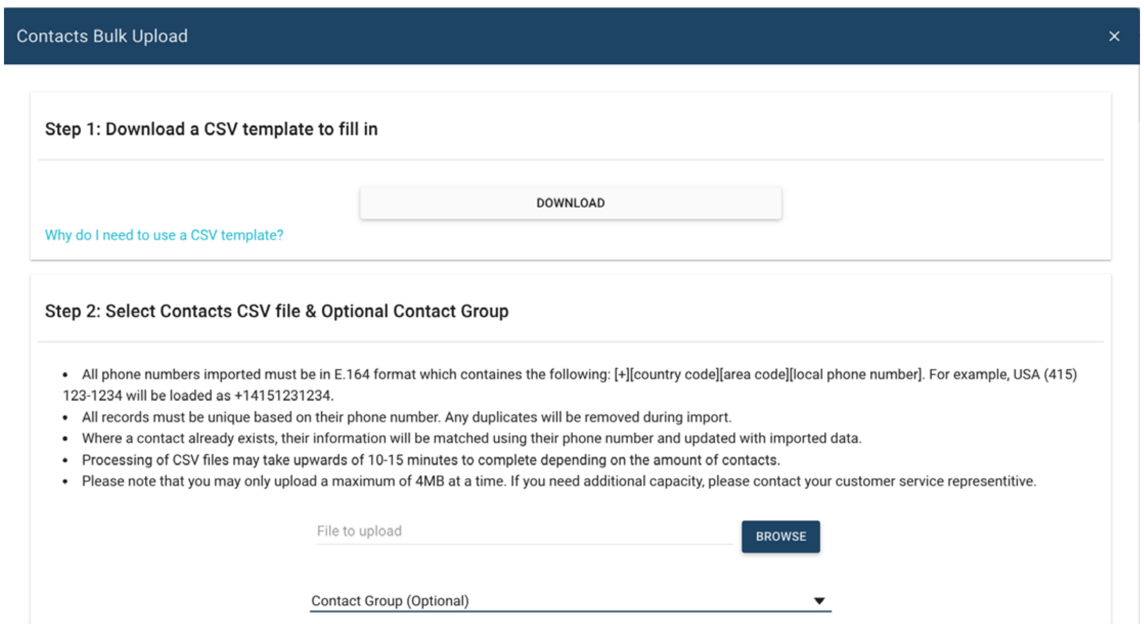
Uploading contacts

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



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.

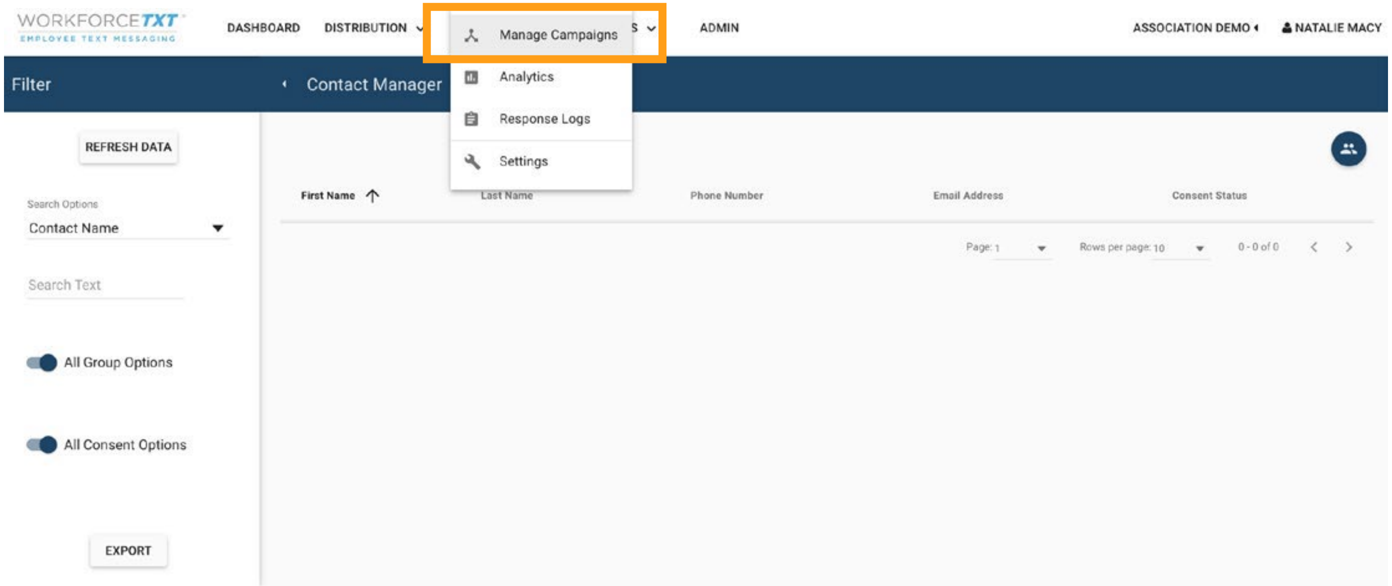


Best practice!

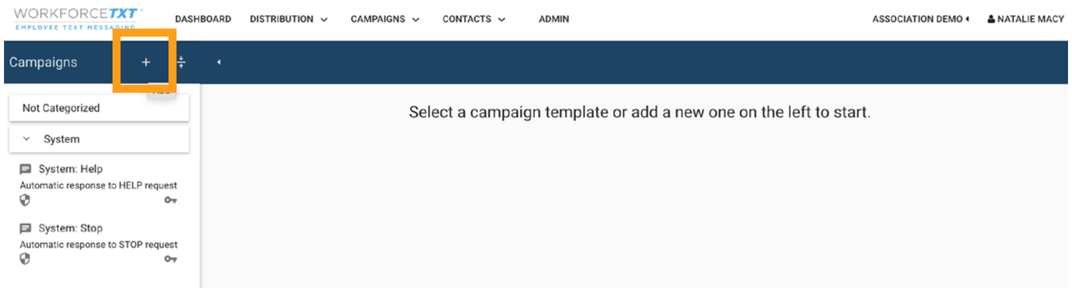
Update your contact lists periodically, or every time you send a text, to account for any new hires or terminated employees.

Create your campaign (text message)

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

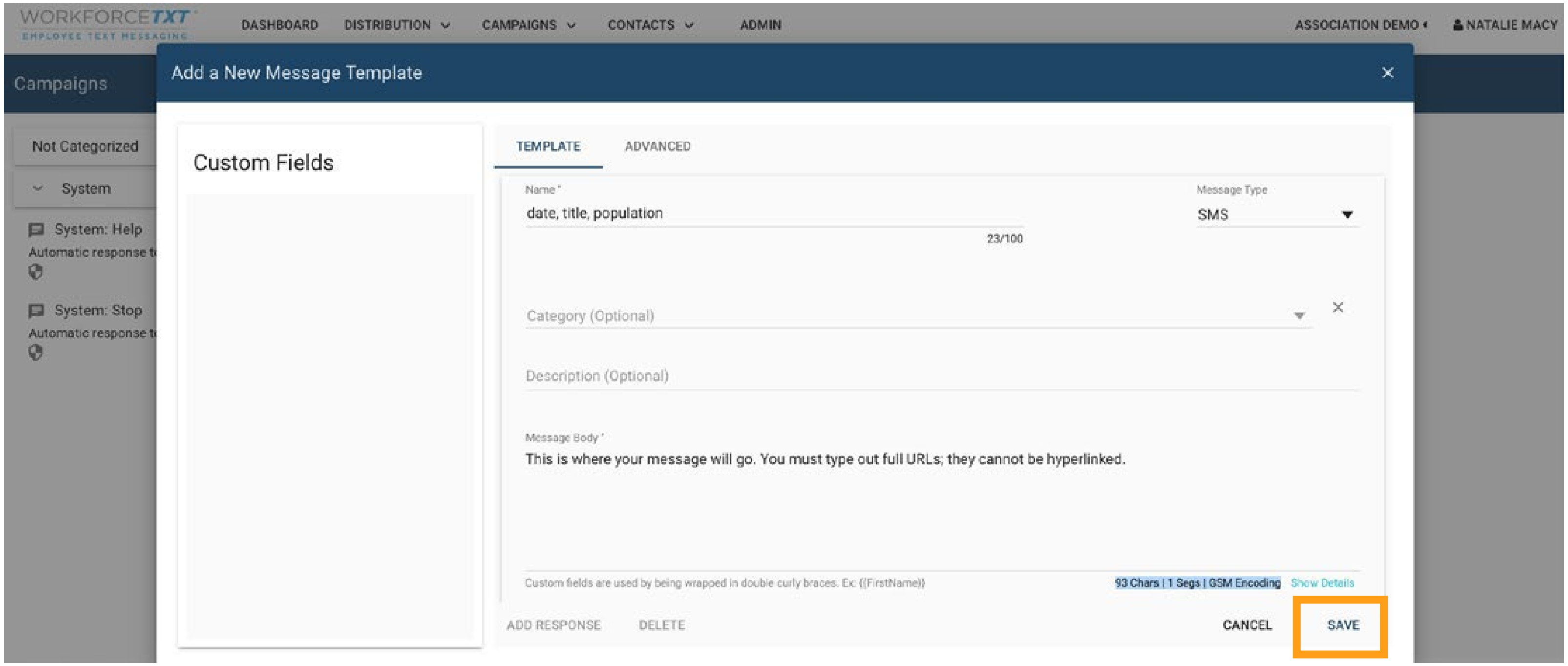


- Click on the "**+**" symbol to start a new message



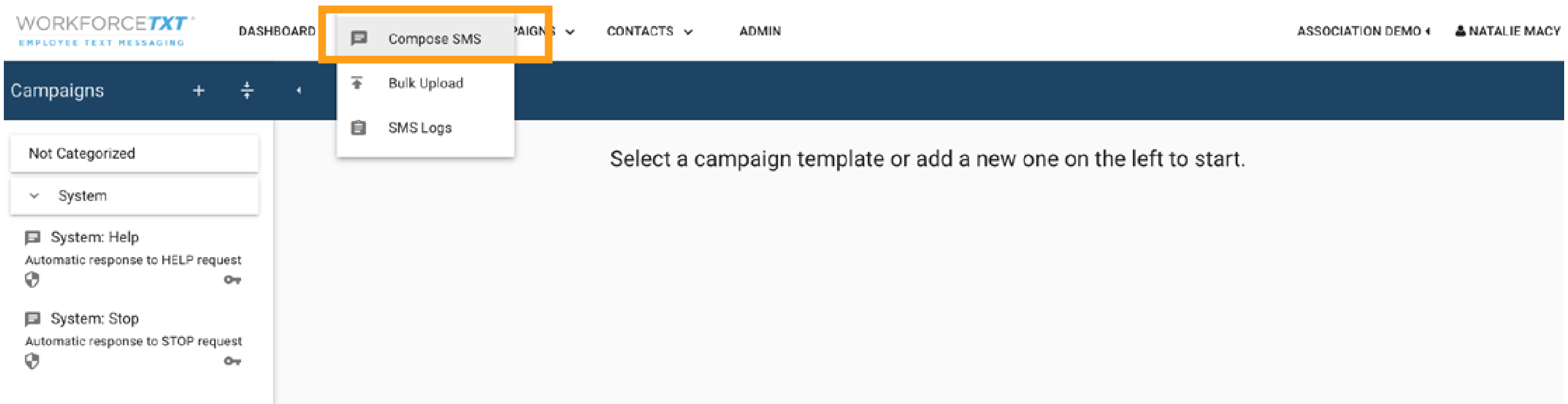
Messaging tips

- **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**.

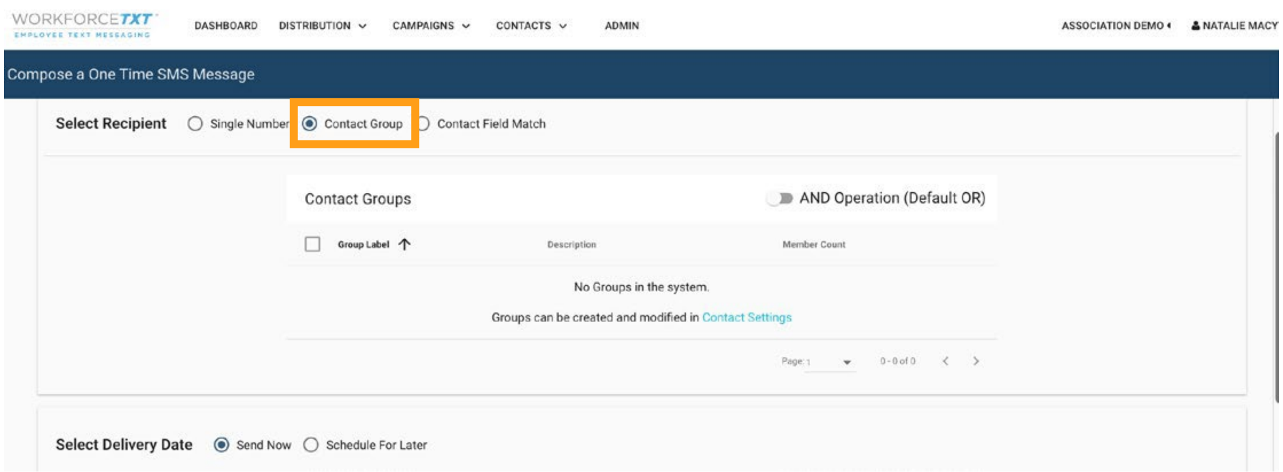


Distributing campaigns/selecting recipients

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

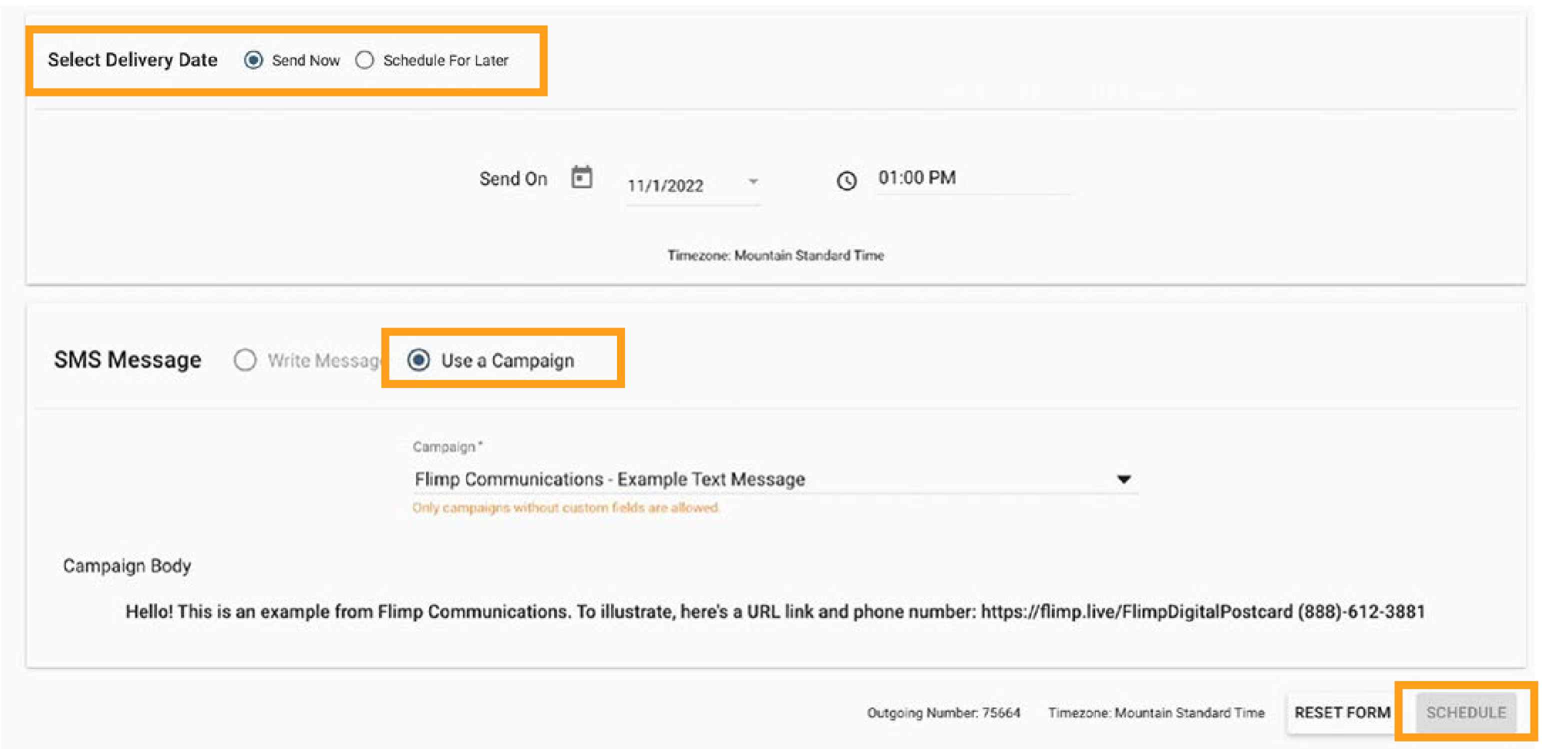


- **Select recipient:** Click **Contact Group** and choose the group of contacts you want to send to.



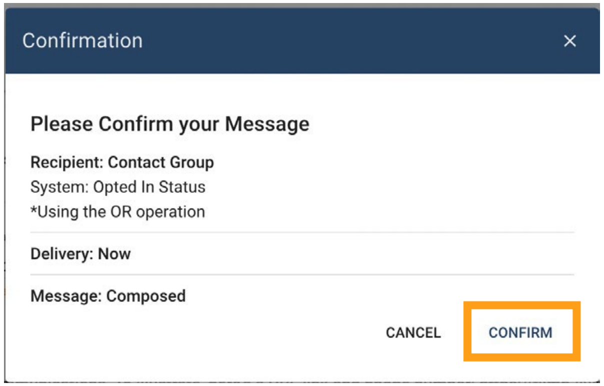
Select delivery date and send your campaign

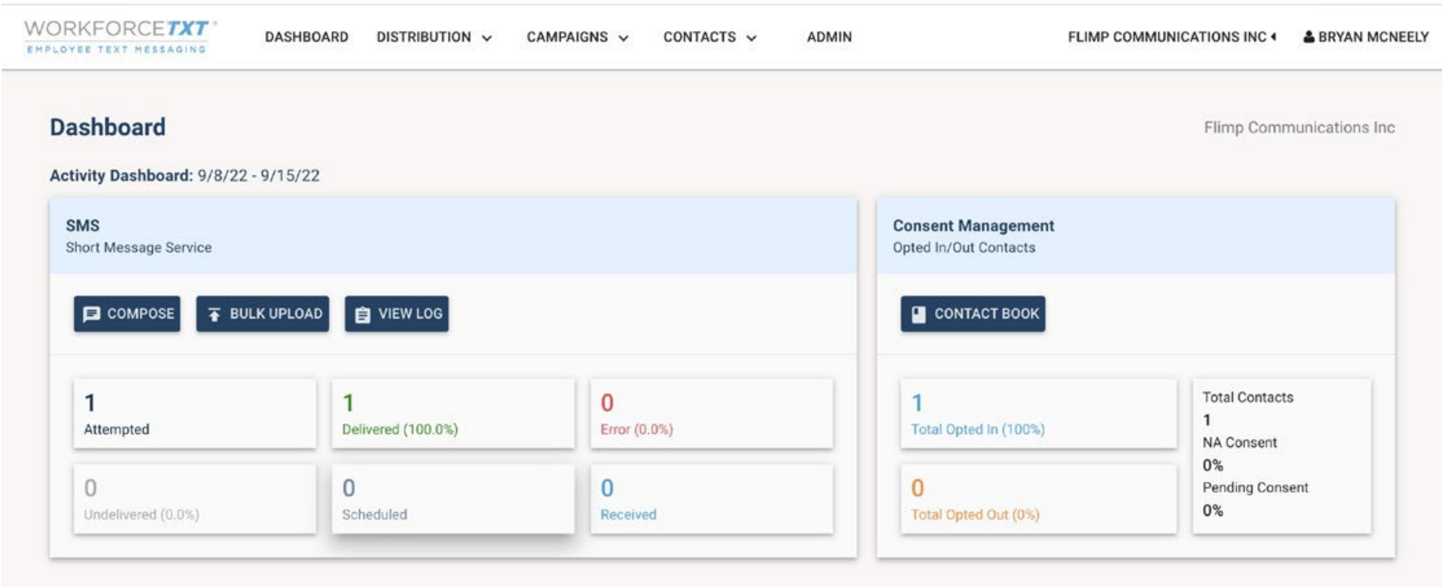
- **Select delivery date:** Click **Send Now** to send the message right away or click **Schedule For Later** to send on a specific date and time. Time must be entered the following format: 00:00 AM (or PM).
- Select **Use a Campaign** and choose which campaign (text message that you created in the prior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



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)





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You're all set!

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