



SMS MODULE

MANUAL



OTYS Recruiting Technology



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1 | INTRODUCTION

1.1 ABOUT THE SMS MODULE

The OTYS SMS Module is a module that enables you to send SMS messages directly from your OTYS system. This can be done on an individual basis or to a group of recipients. The SMS Module is integrated in your OTYS system. For example, you can send an SMS directly from the file of a contact person to the relevant contact and you will also see SMS messages sent earlier in this file.

1.2 PURPOSE OF THIS MANUAL

There are a number of different ways to send SMS messages directly from your OTYS system. For example, you can send an SMS to a candidate to wish them good luck with an interview, or send an SMS to a group of candidates to ask whether they are interested in a particular request. In this manual we explain how this function is integrated in your OTYS system, so you can apply the function for purposes that add value to your process.

1.3 STRUCTURE OF MANUAL

This manual starts with an introduction chapter that explains the added value of the SMS Module in OTYS Go!. Then it discusses the features of the module.

A distinction is made between:

- Set-up of the SMS Module
- Use of the SMS Module
- Management of the SMS Module

2 | SET UP THE SMS MODULE

2.1 SPECIFY SMS ADMINISTRATORS

Every user who has access to the SMS Module is able to send SMS messages from the file of, for example, a candidate and has access to the SMS Module via the Go! navigation at the left top. Within the SMS Module, the user sees an overview of the SMS messages that the user has sent themselves.

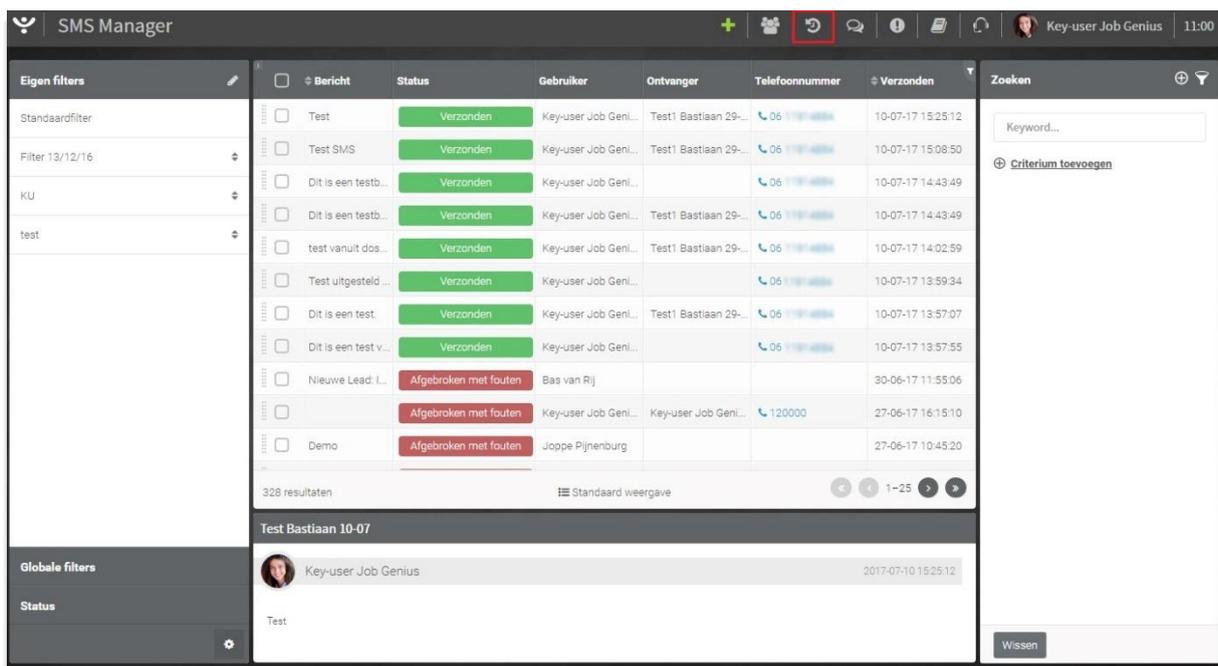


Fig. 1 – SMS Module overview screen in OTYS Go!

Specific users can get rights to become 'SMS administrator'. These users have the following additional rights:

1. Access to SMS messages sent by colleagues

In the SMS Module, these users will not only see the SMS messages they have sent, but also the SMS messages sent by other users.

2. Access to SMS queue

In the SMS Module, the user will have an extra 'SMS queue' icon at the top (red square in Fig. 1). SMS messages sent above the set limit (default is 100 recipients per message) appear in the 'SMS queue'. The SMS administrator is able to approve a message so that it will be sent. The SMS queue also lists deferred SMS messages (e.g. if a user prepares an SMS message to be sent the morning of the day after at 10 AM).

The key user is able to assign users SMS administrator rights. To do this, take the following steps:

1. In the top right corner of your OTYS Go! system, click on your name and then select 'User settings'.
2. At the top right at 'Keyword', enter the keyword 'SMS', followed by 'Enter'.
3. Under 'Assigned user', select the user for whom you want to disable the SMS Module and the associated functionalities.
4. Open the 'SMS Manager - SMS administrator' setting on the left.
5. Select 'Active' under 'Value'.
6. Click 'Save' in the bottom right corner.

The user in question now has rights as an SMS administrator. If you want to switch this option off at a later time; follow the same steps and select 'Disabled' in step (5).

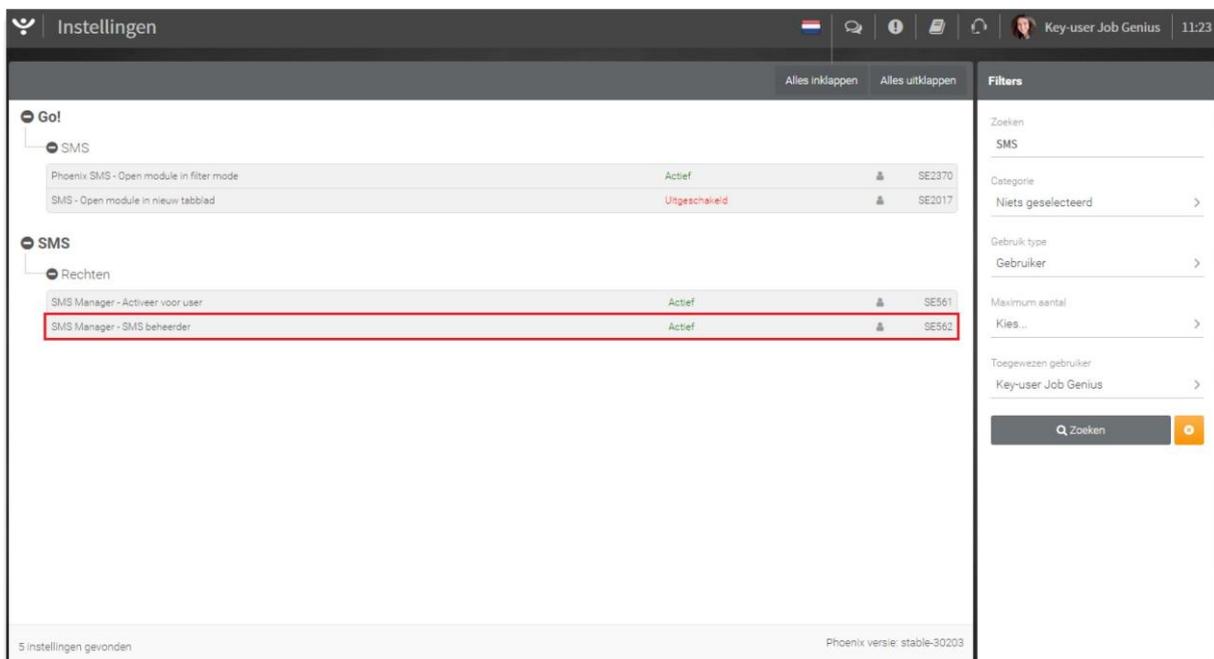


Fig. 2 – Make user SMS administrator

2.2 SET SMS SENDERS

When sending an SMS from your SMS Module you can choose who the sender of the relevant SMS should be. You can choose between:

1. Send the SMS from your company
 In this case, the SMS is sent from a fixed name on behalf of your company. It is then not possible for the recipient to respond to the SMS. If you want a response to this SMS, it is wise to refer to, for example, your telephone number (e.g. 'We have extra shifts tomorrow. Can you work tomorrow? Call us at 012-3456789').

2. Send the SMS from your number

In this case, the SMS is sent from your mobile phone number. Now it is possible for the receiver to respond to the SMS. The response will arrive on your own mobile phone.

For both options, there are a few things that need to be set up properly in your OTYS system.

2.2.1 SET GENERAL SENDER

As a key user you can specify who the general sender is of your SMS messages. This is a setting that applies to all users in your company. You can use up to 14 numeric (0-9) or 11 alphanumeric (A-Z) characters. In most cases you will want to set your company name as a general sender, so assume a maximum of 11 characters. In addition, spaces and special characters (such as the '&' sign) are not supported. If your 'official company name' consists of more than 11 characters (e.g. 'OTYS Recruiting Technology'), you should choose a suitable name that falls within these 11 characters (e.g. 'OTYS').

To set up the general sender, take the following steps:

1. At the top right of your OTYS Go! system, click on your name and then select 'Client settings'.
2. At the top right at 'Keyword', enter the keyword 'SMS', followed by 'Enter'.
3. Open the 'Spryng - General SMS sender' setting on the left.
4. Enter the name you want under 'Value'. Please remember to take into account the above requirements for this name.
5. Click 'Save' in the bottom right corner.

The general sender has now been set.

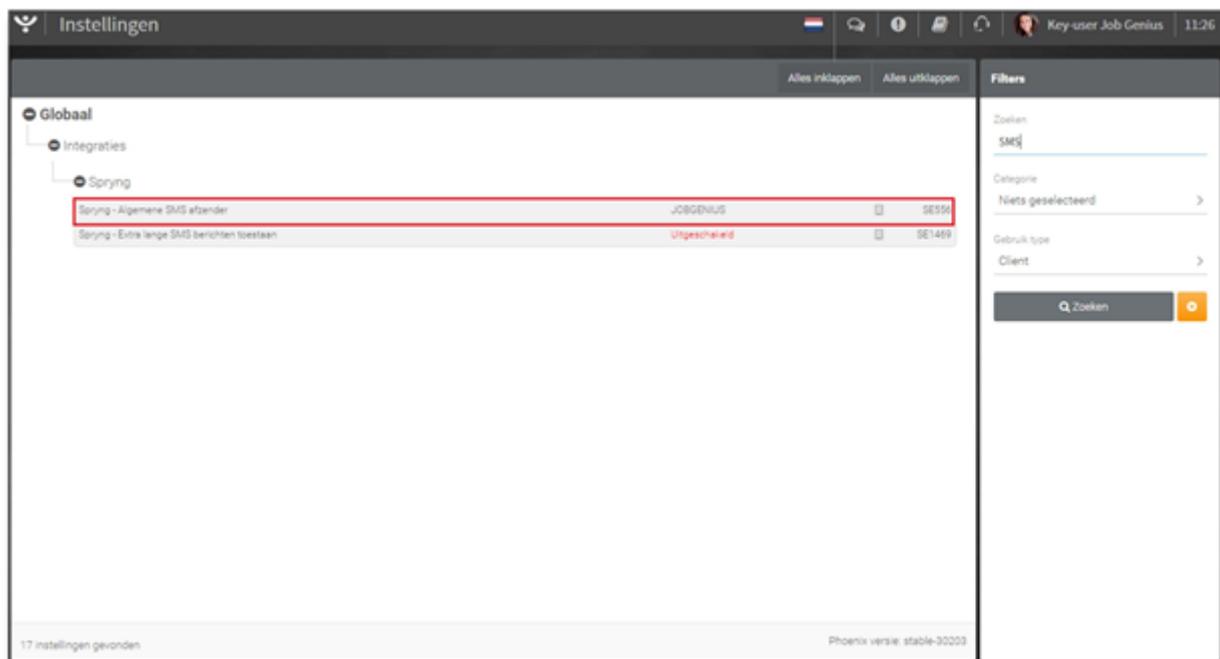


Fig. 3 – Set general sender

2.2.2 SET USER TELEPHONE NUMBERS

If an SMS message is to be sent with the user's mobile phone number as the sender, this mobile phone number first needs to have been set up of course. Each user can set their sender number themselves. Key users are able to set this number for other users.

To set your own (or a colleague's) mobile phone number, take the following steps:

1. In the top right corner of your OTYS Go! system, click on your name and then select 'User settings'.
2. At the top right at 'Keyword', enter the word 'mobile', followed by 'Enter'.
3. Under 'Assigned user' choose the user for whom you want to change the mobile number (only applicable for key users).
4. Open the 'Personal details - Mobile phone' setting on the left.
5. Enter the mobile phone number under 'Value' (use the format +447xxxxxxxxx).
6. Click 'Save' in the bottom right corner.

The mobile phone number is now set for the relevant user.

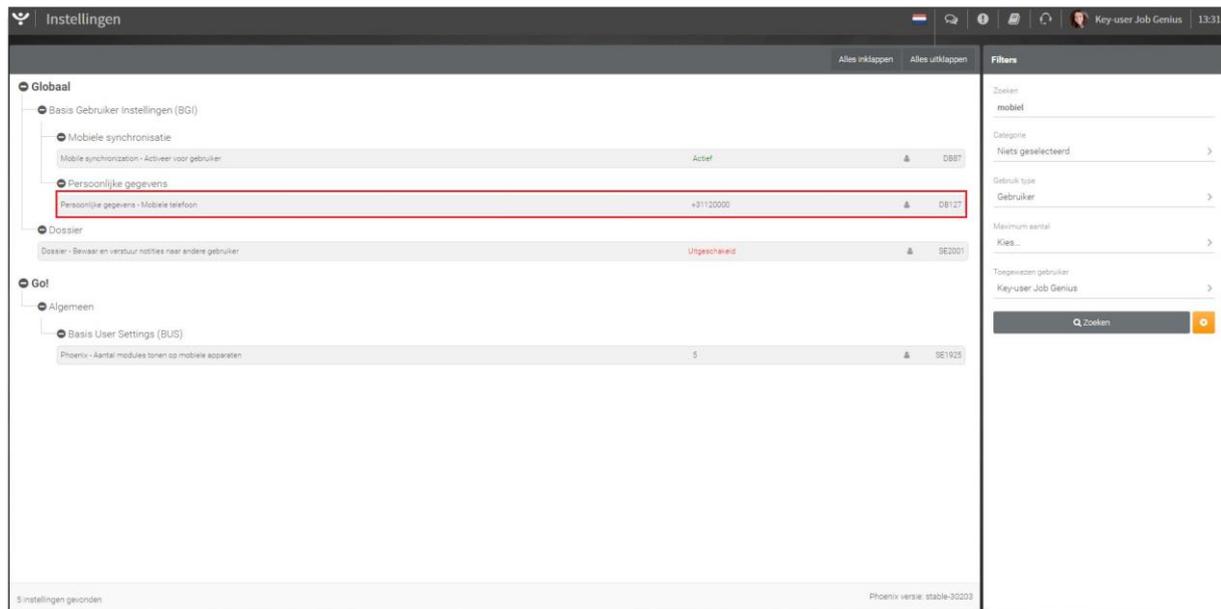


Fig. 4 – Add a user's number

2.3 SEND EXTRA LONG MESSAGES

An SMS message that is sent via Spryng's SMS gateway can consist of a maximum of 140 characters. You may be able to send SMS messages of 160 characters via your mobile phone, but because of the way they are sent via Spryng (with '8 bits characters') the Spryng maximum (and therefore OTYS maximum) is 140 characters by default.

However, it is possible to send SMS messages that are longer than 140 characters. In this case, the SMS messages are 'combined'. This is a process that happens in the background; the recipient will only receive one (longer) SMS. This is not a standard option because several SMS messages are actually sent when sending a longer SMS, which means you use up your SMS message credit faster.

To set up extra-long messages, take the following steps:

1. At the top right of your OTYS Go! system, click on your name and then select 'Client settings'.
2. At the top right at 'Keyword', enter the keyword 'SMS', followed by 'Enter'.
3. Open the setting 'Spryng - Allow extra long SMS messages' on the left.
4. Select 'Active' under 'Value'.
5. Click 'Save' in the bottom right corner.

The extra long SMS messages are now enabled. If you want to switch this option off at a later time; follow the same steps and select 'Disabled' in step (4).

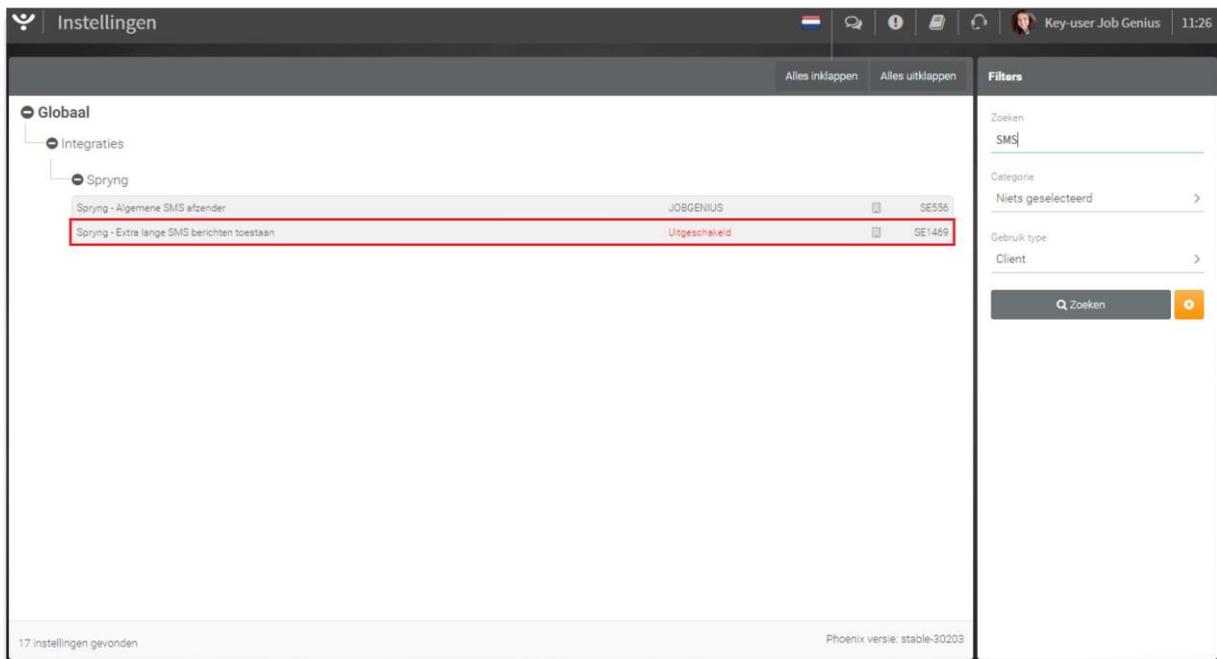


Fig. 5 – Allow extra long messages

2.4 DEACTIVATE SMS MODULE FOR USERS

The SMS Module is activated for all your users by default. There may be situations where you do not want specific users to access the SMS Module and send SMS messages from your OTYS system. The key user can therefore disable the SMS Module for specific users.

To disable the SMS Module and associated functionalities for a user, take the following steps:

1. In the top right corner of your OTYS Go! system, click on your name and then select 'User settings'.
2. At the top right at 'Keyword', enter the keyword 'SMS', followed by 'Enter'.
3. Under 'Assigned user', select the user for whom you want to disable the SMS Module and the associated functionalities.
4. Open the 'SMS Manager - Activate for user' setting on the left.
5. Select 'Disabled' under 'Value'.
6. Click 'Save' in the bottom right corner.

The SMS Module and the associated functionalities are now switched off for the relevant user. If you want to switch this option on again at a later time; follow the same steps and select 'Active' in step (5).

The screenshot shows the 'Instellingen' (Settings) page in the OTYS system. The main content area is divided into sections: 'Go!', 'SMS', and 'Rechten'. Under 'Rechten', there is a table of permissions:

Naam	Status	Icon	ID
Phoenix SMS - Open module in filter mode	Actief	🔒	SE2370
SMS - Open module in nieuw tabblad	Uitgeschakeld	🔒	SE2017
SMS			
Rechten			
SMS Manager - Activeer voor user	Actief	🔒	SE561
SMS Manager - SMS beheerder	Actief	🔒	SE562

The 'Filters' sidebar on the right contains the following information:

- Zoeken: sms
- Categorie: Niets geselecteerd
- Gebruik type: Gebruiker
- Maximum aantal: Actieve gebruikers
- Toegewezen gebruiker: Key-user Job Genius

At the bottom of the main content area, it says '5 instellingen gevonden' and 'Phoenix versie: stable-30203'.

Fig. 6 – Deactivate the SMS Module for a user

3 | USE OF THE SMS MODULE

3.1 SEARCH AND FILTER

When you open the SMS Module, you will see a list of SMS messages. In order to find the right message in the long list of messages you have in your system, you can use the advanced filter and search function for OTYS Go!. You can find the search function in the right-hand panel of your screen. Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at any time. Instructions on the best way to use these functions are given in the manual 'Lists, Searches and Matching in Go!'. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

3.2 EDIT YOUR LIST VIEW

Do you often work with the SMS Module and do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You simply save your new view so you can use it any time. Instructions on the best way to use this function are given in the manual 'Lists, Searches and Matching in Go!'.

3.3 SEND NEW SMS FROM SMS MODULE

You can send a new SMS from within the SMS Module via the following steps:

1. Click on the 'New SMS message' button at the top of the SMS Module.



Fig. 7 – Create new SMS from SMS Module

2. A window will appear where you can enter the following information:
 - a. There are two ways to add one or more recipients of your SMS message:
 - i. Under 'Recipients' you can enter a mobile phone number in a local ('07 xxxxxxxx') or international ('+447xxxxxxxx') format. If you enter the number in a local format, it will automatically be converted for you into an international format.

- ii. By clicking on 'Select recipients', a new window opens with a search field on the left to search for recipients. You can search for people who are members of a certain SMS group, colleagues or candidates. To add a person you have found to the SMS, click on the 'Add' icon to the right of the person's phone number. The person then appears in the list on the right side of your screen. This way you can add multiple recipients. If you have accidentally added someone, you can remove them from the list of recipients on the right-hand side of your screen with the 'Delete' icon. Once you have finished selecting the recipients, click on the 'Select' button at the bottom right.
- b. By default, SMS messages are sent as quickly as possible. By setting 'Yes' to 'Sending time', you can specify a date and time when you want to send the message. In this way, for example, you can schedule today for this message to be sent tomorrow morning at 10 AM.
- c. By default, SMS messages are sent from a general name. You can find more information about this in Section 2.2.1. By checking 'Send from my phone number', the SMS message is sent from your own mobile phone number. To make sure this works, you must have set your telephone number correctly. Section 2.2.2 explains how to do this.
- d. Under 'Subject' you can enter a reference for this SMS message. This only applies for example to displaying the SMS message in a file. An SMS message itself has no subject, so the recipient will not see this subject. So do not put anything here that is important for the recipient and is not repeated in the message itself.
- e. Under 'Message' you can enter the SMS message itself. Below this text area you can see how many characters you can still use for compiling the message. By default this is a maximum of 140 characters per message. Section 2.3 explains how you can increase this number of characters.
- f. Finally click on 'Send' to send the SMS message.

If you have chosen to send the SMS message immediately, the SMS message will appear in your list of SMS messages at once. With this list you can also track the status of the sent SMS message.

If you have chosen to send the SMS message at a later time, the SMS message will be placed in the 'SMS queue'. Once the message is sent, it will appear in your list of SMS messages.

To prevent your company's SMS credit from running out too quickly, a limit has been set on the number of recipients per SMS. If you exceed this limit, you will receive a notification after sending the SMS. In this case, the SMS message is also placed in the 'SMS queue'. The SMS administrator (see Section 2.1) is then able to approve the SMS message so that it is sent.

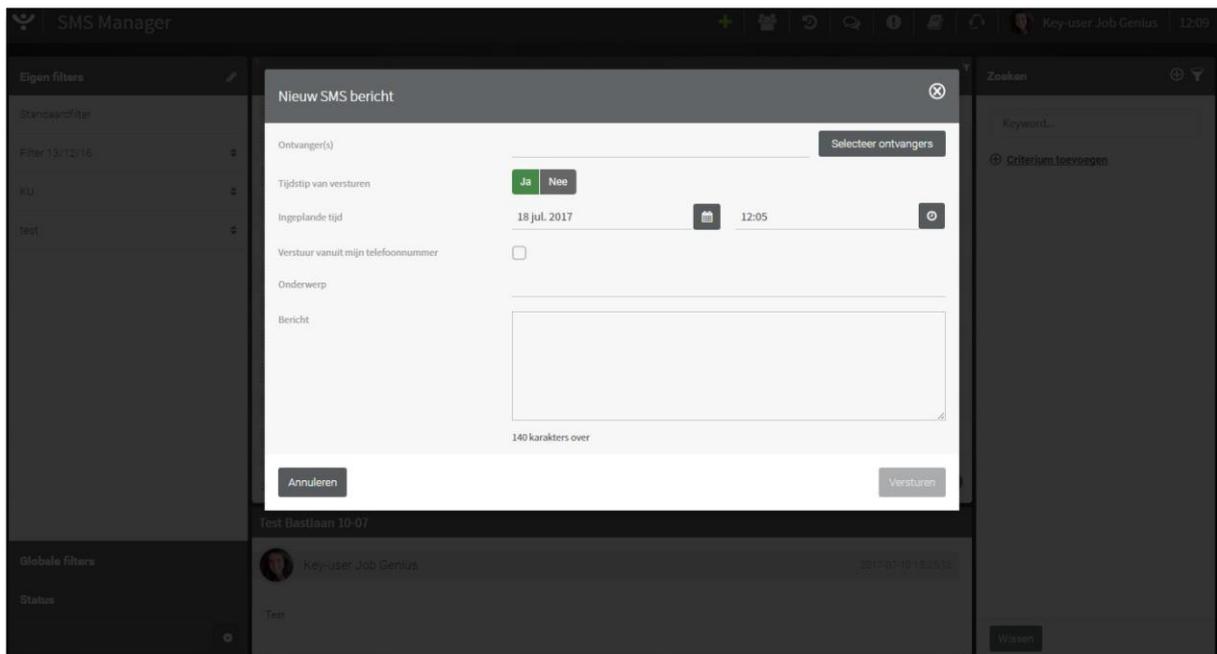


Fig. 8 – Enter details of a new SMS

3.4 SEND NEW SMS FROM FILE

It is also possible to send an SMS from within the file of a candidate or contact. To do this, click on the 'New SMS' icon at the top of the relevant file. A similar window will then open as mentioned in the previous section, however the candidate or contact person concerned will already be pre-selected as recipient.

The other steps for sending the SMS are described in Section 3.3.

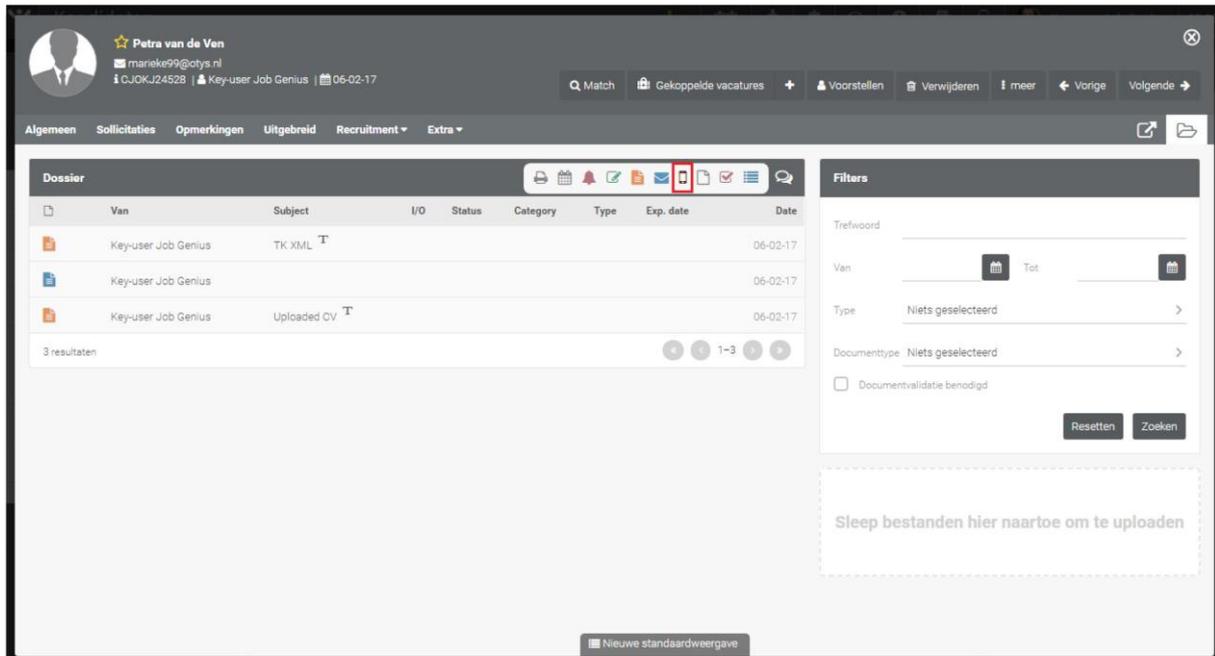


Fig. 8 – Send new SMS from file

3.5 OPEN SMS DETAIL

If you open a previously sent SMS in the SMS Module or in a file, the SMS detail opens. In this window you can see which message has been sent to which person (or persons). You also see who sent the message and what the current status is.

You also have the option to relate the SMS message to other records (e.g. to a specific candidate). Via the 'Related to' button you can search and select other records. On the left side you search & select these records, after which they appear on the right. When you are done with this click on 'Close' at the bottom left. If you, for example, send an SMS to a candidate to wish them good luck at an interview, you can use this process to ensure that the SMS message also appears in the file with the relevant vacancy.

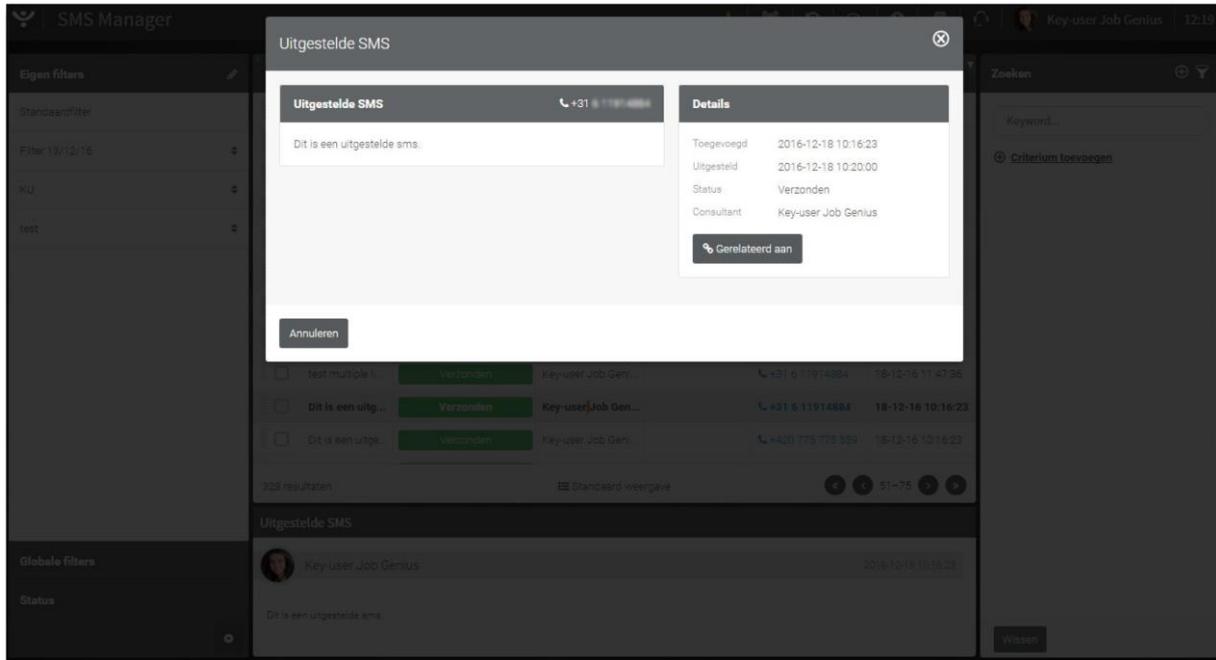


Fig. 9 – Detail screen of an SMS message

4 | MANAGEMENT OF THE SMS MODULE

4.1 MANAGE SMS GROUPS

Through the SMS Module it is possible to compose SMS groups. This allows you to place multiple recipients in one group, so that you can then easily send them all an SMS. By clicking on the 'SMS groups' icon in the top of your SMS Module, you will enter the screen where you can manage these groups.

4.1.1 CREATE NEW SMS GROUP

You can create a new SMS group with the following steps:

1. Click on the 'New group' icon at the top.



Fig. 10 – Create SMS group

2. In the window that opens at 'Name', enter the name you want for the SMS group.
3. Click on 'Add' to create the SMS group.

The (empty) group has been created and will be opened immediately.

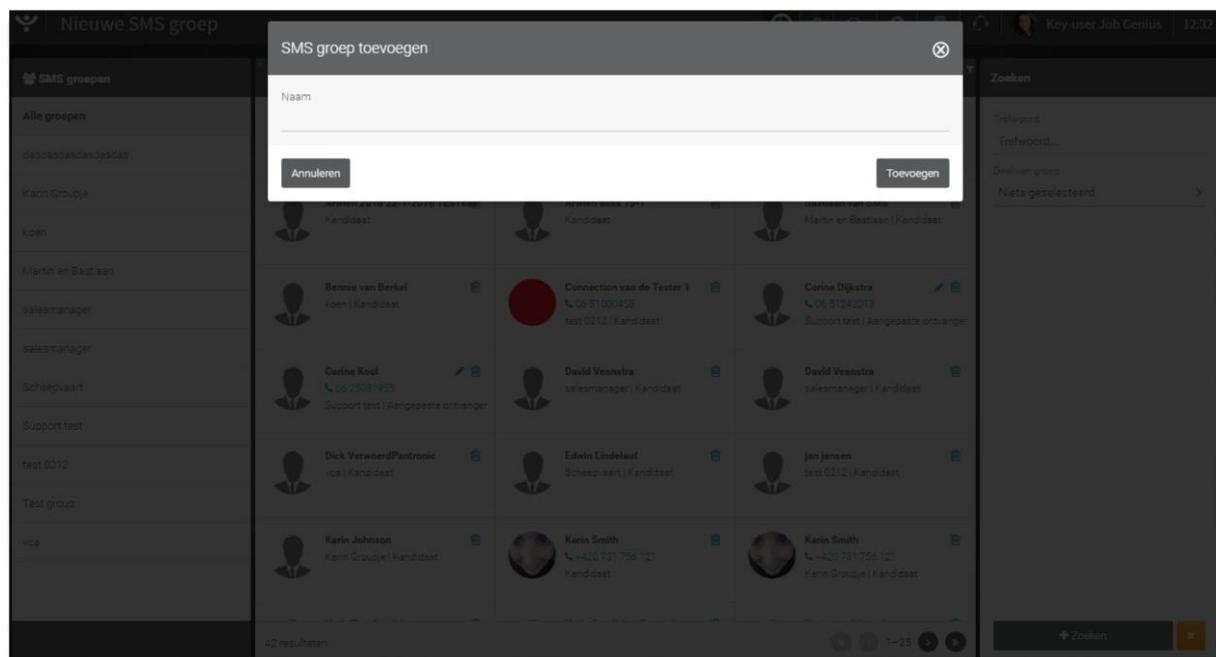


Fig. 11 – Give SMS group a name

4.1.2 ADD MEMBERS TO SMS GROUP

You can add new members to an existing SMS group by using the following steps:

1. Click to the left of the SMS group to which you want to add members.
2. Click on the 'Add members' button at the top right.
3. A new window opens with the option to add members on the left. If you choose 'Custom recipient' at the top, you can enter a name and telephone number manually. If you choose 'Users' or 'Candidates' at the top, you can select colleagues or candidates to add. To add a person you have found to the SMS, click on the 'Add' icon to the right of the person's phone number. The person then appears in the list on the right side of your screen. This way you can add multiple members. If you have accidentally added someone, you can remove them from the list of members on the right-hand side of your screen with the 'Delete' icon. Once you have finished selecting the recipients, click on the 'Save' button at the bottom right.

The members have now been added to your SMS group.

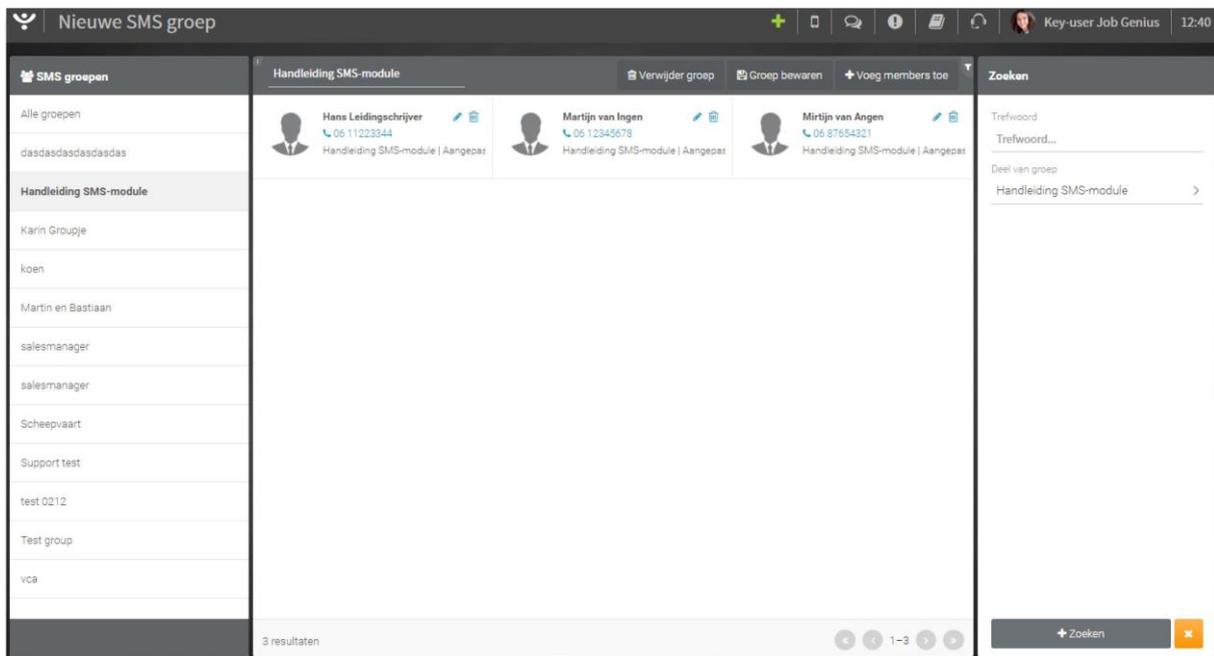


Fig. 12 – Add members to an SMS group

4.1.3 EDIT SMS GROUP NAME

You can create a new name for an SMS group using the following steps:

1. Click to the left of the SMS group of which you want to edit the name.
2. In the field at the top of the window, edit the name of the SMS group.
3. Click on the 'Save group' button at the top right.

The name of the SMS group has now been changed.

4.1.4 DELETE SMS GROUP

You can delete an existing SMS group using the following steps:

1. Click to the left of the SMS group you want to delete.
2. Click on the 'Delete group' button at the top right.
3. Confirmation will be requested. Click 'Yes' to confirm this action. The SMS group has

now been deleted and is no longer visible in your list.

4.2 SMS QUEUE

If you are an SMS administrator (see Section 2.1), you have access to the SMS queue. SMS messages sent above the set limit (default is 100 recipients per message) appear in the 'SMS queue'. The SMS administrator is able to approve a message so it is sent. The SMS queue also includes deferred SMS messages (e.g. if a user prepares an SMS message to be sent the morning of the day after at 10 AM). By clicking on the 'SMS groups' icon in the top of your SMS Module, you will enter the screen where you can manage this queue.

SMS messages with a red cross in the 'Approved' column have not yet been approved. By clicking on the SMS message and clicking on the 'Approve' button, you can approve the message, after which it will be sent.



Fig. 13 – Go to the SMS queue

SMS wachtrij

Eigen filters	<input type="checkbox"/> Naam	Send date	Status	Gebruiker	Goe...	S...
Standaardfilter	<input type="checkbox"/> Test Bastiaan 10-07 15-52	10-07-17 15:52:36	Waiting	Key-user Job Geni...	✗	✓
For approval	<input type="checkbox"/> Test Bastiaan 10-07	10-07-17 22:00:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> test	10-07-17 15:15:40	Waiting	Key-user Job Geni...	✗	✗
	<input type="checkbox"/> Test SMS	10-07-17 22:00:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> Tweede test in groep	10-07-17 14:52:33	Waiting	Key-user Job Geni...	✗	✓
	<input type="checkbox"/> Testje uitgesteld	09-07-17 22:00:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> scheduled sms again	21-12-16 16:43:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> test queue	21-12-16 15:17:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> TR	19-12-16 10:57:00	Waiting	Key-user Job Geni...	✓	✗
	<input type="checkbox"/> test 1222	18-12-16 12:22:29	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> test multiple limiet bo	18-12-16 11:47:12	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> test vanuit go!	18-12-16 10:30:00	Waiting	Key-user Job Geni...	✓	✗
	<input type="checkbox"/> Uitgestelde SMS	18-12-16 10:19:36	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> Test	16-12-16 11:10:00	Finished	Key-user Job Geni...	✓	✓
	<input type="checkbox"/> scheduled sms	NaN-NaN-aN NaN...	Waiting	Key-user Job Geni...	✓	✗
	<input type="checkbox"/> scheduled sms	NaN-NaN-aN NaN...	Waiting	Key-user Job Geni...	✓	✗

24 resultaten

Fig. 14 – Overview of the SMS queue with approved and unapproved messages

SMS wachtrij

test vanuit go!

Ingepland voor	Details
18 jul. 2017 13:00	Toegevoegd: 2016-12-18 10:18:52 Uitgesteld: 2016-12-18 10:30:00 Prioriteit: 25 SMS aantal: 2 Status: Waiting Consultant: Key-user Job Genius Goedgekeurd: ja Goedgekeurd: nee

test vanuit go!
dit is een uitgestelde sms vanuit go!

Annuleren Verwijderen Goedgeuren Bewaren

Fig. 15 – Approve pending SMS messages