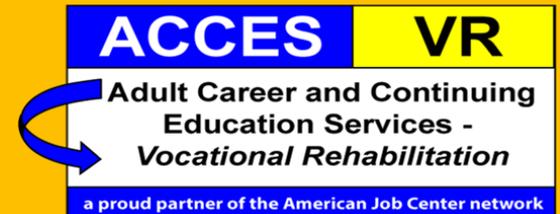


# YakChat User Guide

## Text/Messaging Tool for Teams



# YakChat



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## Introduction

This user guide is designed to provide documentation for ACCES-VR staff who will use the YakChat application on a daily basis and who have been provided a license to use this application. Installation and administration of the YakChat application is provided by NYSED ITS (Information Technology Services).

### *What is YakChat for Microsoft Teams?*

YakChat adds Short Message Service (SMS) text messaging to Microsoft Teams (Teams), making it quick and easy to send and receive text messages from within Microsoft's collaboration app. YakChat for Teams consists of two elements:

- 1) A text messaging app that lets you manage your contacts and text conversations quickly and easily.
- 2) A bot that will notify you of new text messages wherever you are in Teams. This is only a notification service and cannot be used to reply to messages.

### *How do I access YakChat?*

The NYSED YakChat application and bot will be added to your Teams profile by NYSED ITS. This process will automatically 'pin' both elements to the Teams sidebar and you will only need to sign in initially to start sending and receiving SMS text messages.

### *What number will YakChat use?*

YakChat/NYSED ITS will assign a number to your account based on your local area code. This number is **not** a voice enabled phone number and if a recipient of an SMS text does attempt to call this number, a pre-recorded audio message will play.

### *How do I use YakChat?*

The following step-by-step details with screenshots in this document will provide you with instructions on how to use the YakChat app and bot. For support on YakChat or Teams please use our Help Desk website for FAQs and articles on these tools located at <https://vrsupport.nysed.gov> where you can submit a help desk ticket or you can email [vrsupport@nysed.gov](mailto:vrsupport@nysed.gov) -- please enter YakChat in the subject.

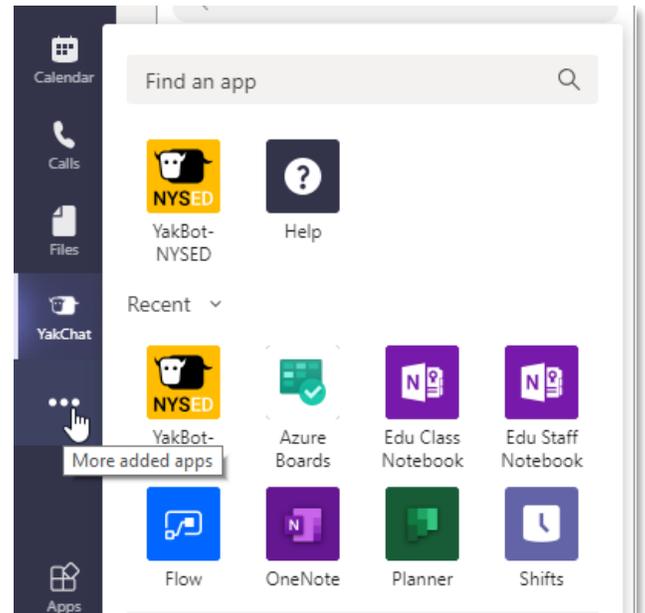
## How To Manage Text Messaging

### Start YakChat

Click on the horizontal ellipsis icon (...) in the Teams toolbar on the left-hand side of the screen.

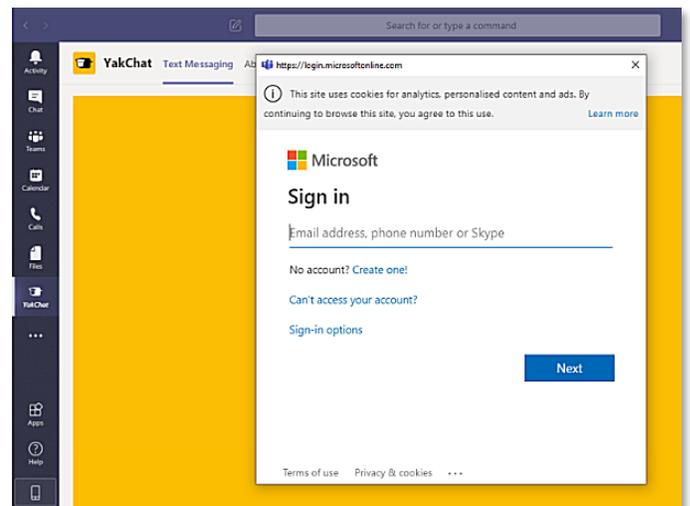
Then select **YakChat**

Note: this should already be 'pinned' to your toolbar but, depending on your screen size and the limitation of the number of icons that can be displayed, you may need to look for **More added apps**.



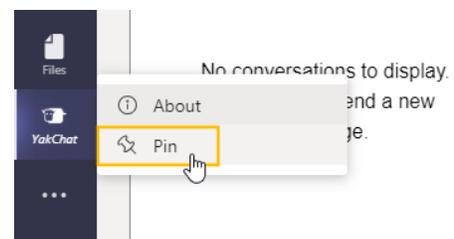
### Microsoft Sign In

The first time you run the YakChat app, you will need to sign-in with your Teams email and password. You will also use these credentials to login to the YakBot.



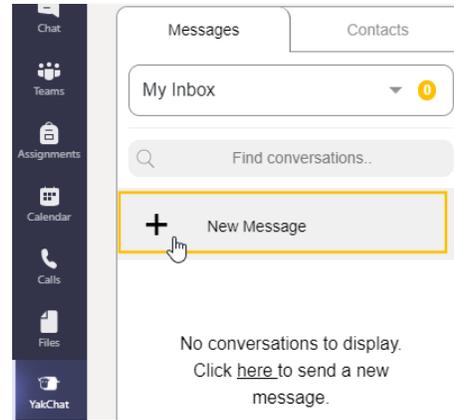
### Pin to Sidebar

Your YakChat app should already be pinned from the NYSED ITS installation. If needed, you can right-click the YakChat icon and select *Pin* to add YakChat to the sidebar.



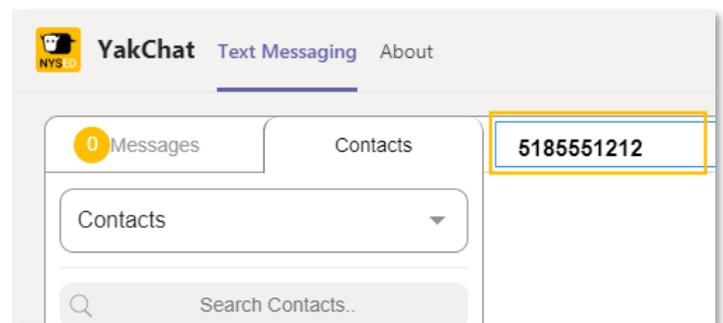
## New Message

Click on the New Message 'plus' icon + in the Messages tab.



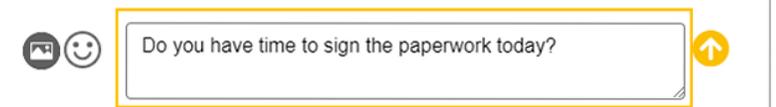
## Enter Number

The new message will now be displayed. In the top bar of the message window, type in the **cell phone number** that you want your message to go to.



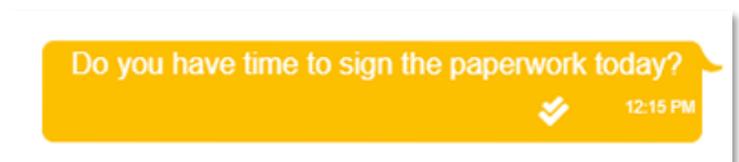
## Compose Your Message

Now you can type your message in the *Type a message box*. You will find this at the bottom of the message window.



## Send Your Text

Click on the send button  or press Enter on your keyboard to send the message. The status of your text will then be shown in the lower right-hand corner of the message bubble. A *single checkmark* indicates that your message was sent. A *double checkmark* indicates that your message was delivered.

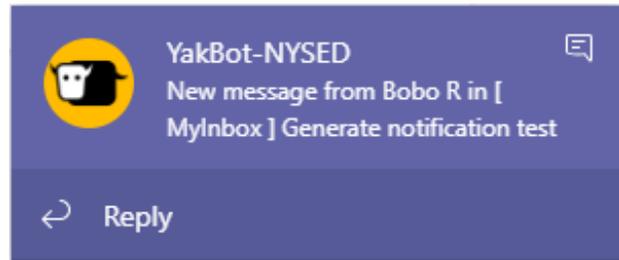


## YakBot Notifications

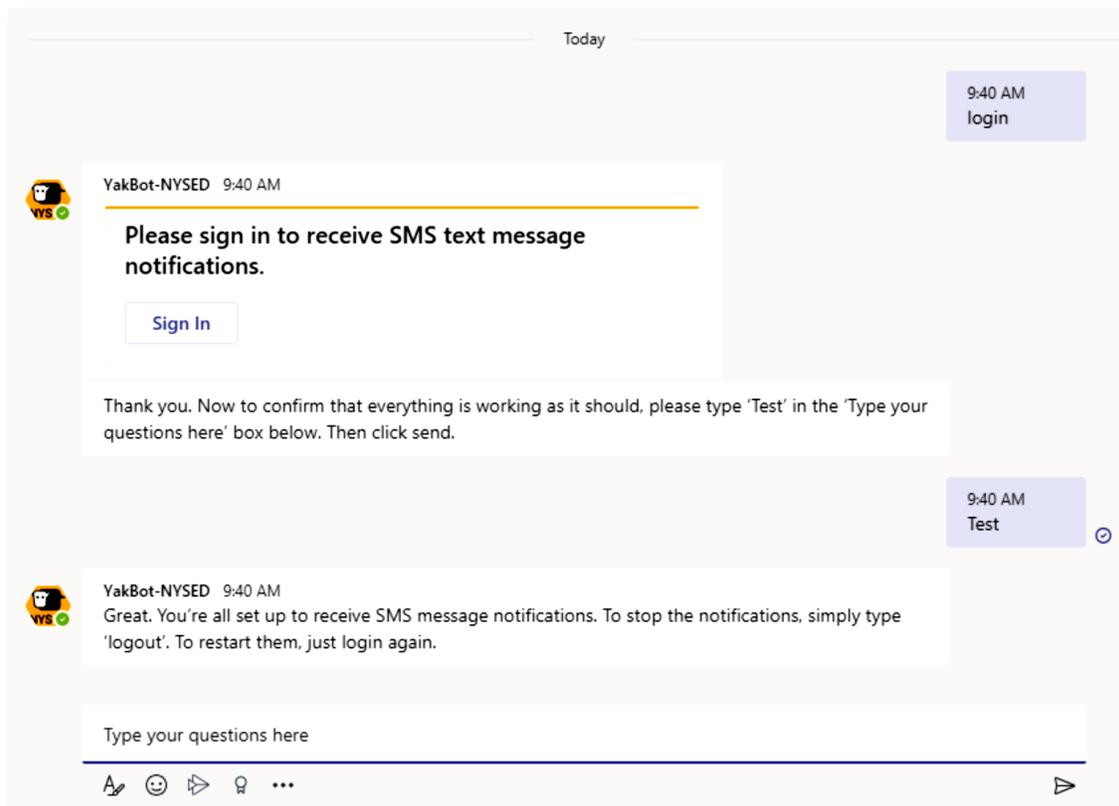
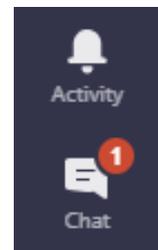
The companion YakBot application is for notifications only. When an incoming message is received you will see a Teams-based notification message appear.



This notification is styled like a Teams message but is only a notification so **do not click on the reply option**. You will also see a notification indicator appear on your tool bar. This will be in a counter style to let you know that you have 1 or more new messages.



To receive your notifications, launch YakBot and type **login** in the "Type your questions here" box and send (or press Enter). You will then be prompted to Sign In with your NYSED account details. Type **Test** and send to verify that your Bot is working properly. You will need to be signed into the YakBot to receive notifications of incoming messages.

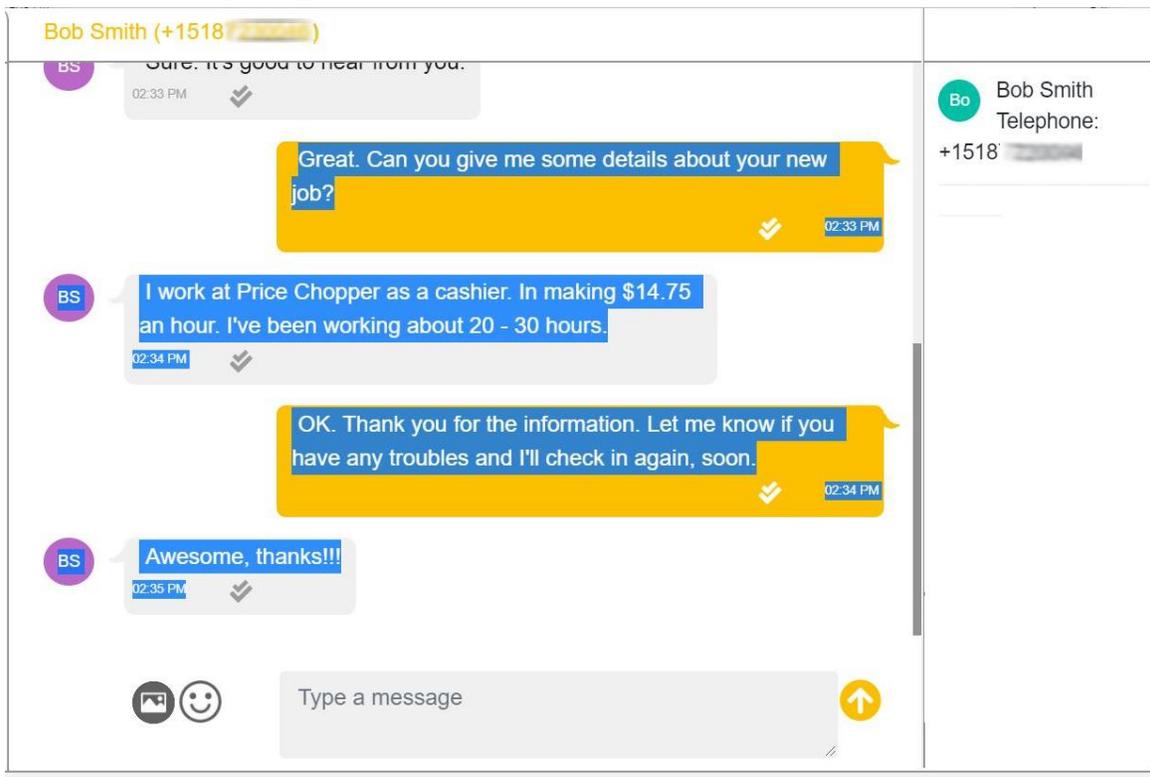


## Copying a Conversation and Pasting into CaMS

### Copying from a conversation

It is important to note that there is no built-in Copy button nor is the Right-Mouse-Click available during this operation in YakChat. You will need to use the keyboard shortcut of **Ctrl+C** to copy the conversation or parts of it.

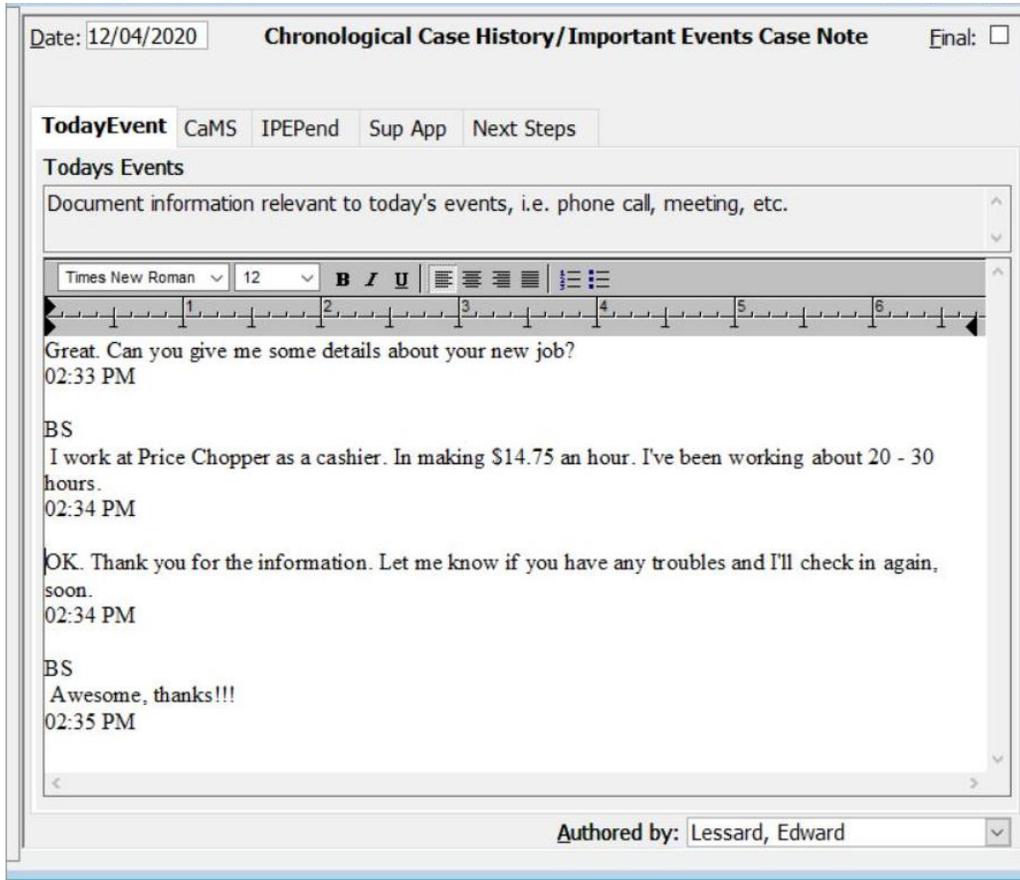
Go to a conversation you would like to copy and using your mouse click and drag to highlight all or parts of the conversation. Use the keyboard shortcut **Ctrl+C** to copy this information into a virtual clipboard.



### Pasting into CaMS

Inside of CaMS or if you wanted to paste into a Word document you will have the ability to use the Right-Mouse-Click and get access to the Paste function or you can use the Keyboard shortcut: **Ctrl+V**

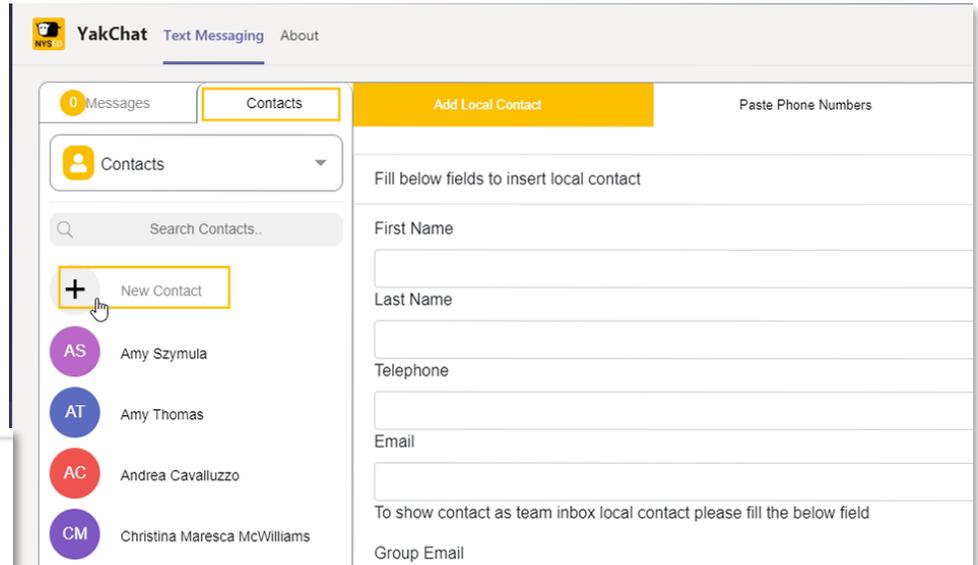
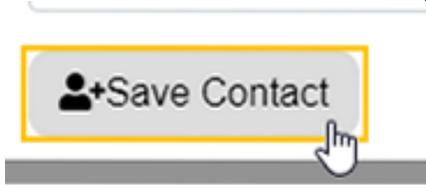
Navigate to the section or case note in CaMS where you would like to have a record of the conversation and Paste the information from YakChat using either **Ctrl+V** or Right-Mouse-Click and select Paste.



## Managing Contacts

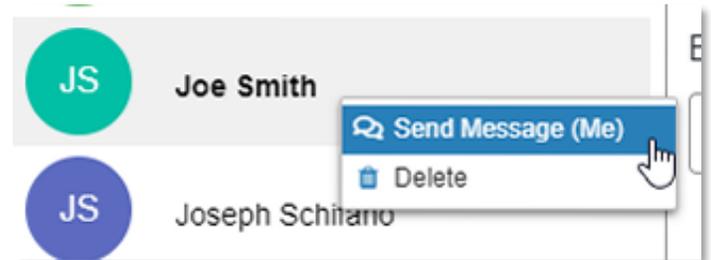
### Adding a New Contact

Select the *Contacts* tab and click the plus + to create a New Contact. Enter the contact information and click on the *Save Contact* button at the bottom of the screen.



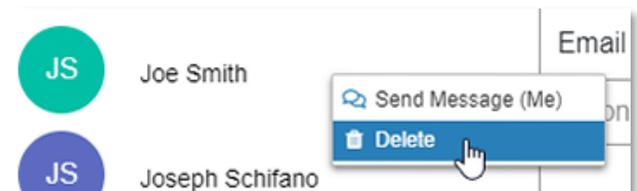
### Sending a Message to a Contact or Multiple Contacts

You can right-click on a contact and select Send Message. To select multiple contacts, use the **CTRL** key and click to select multiple names in your contact list. Then right-click to choose Send Message. Your recipients will not see the contact information for each other and will not know that it is a group message. When someone replies to this group message it will open into its own message window to help manage your conversations.



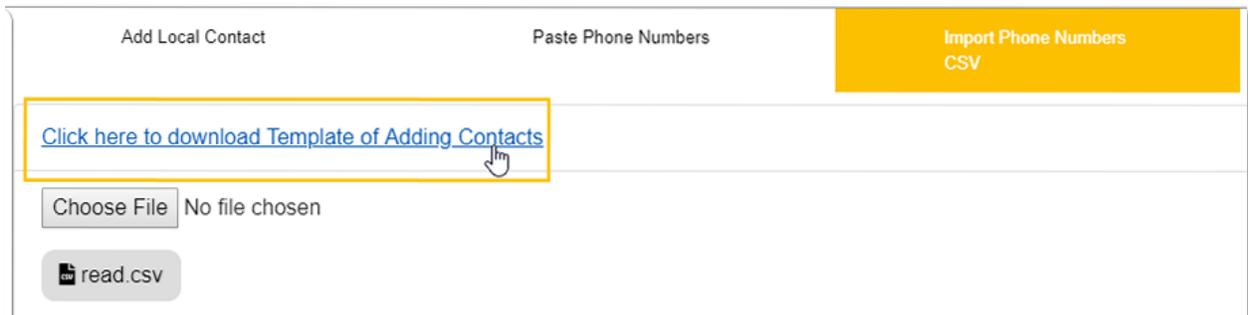
### Deleting a Contact

To remove a contact from your list, you must **first select the contact** then you can right-click on the contact and select Delete.

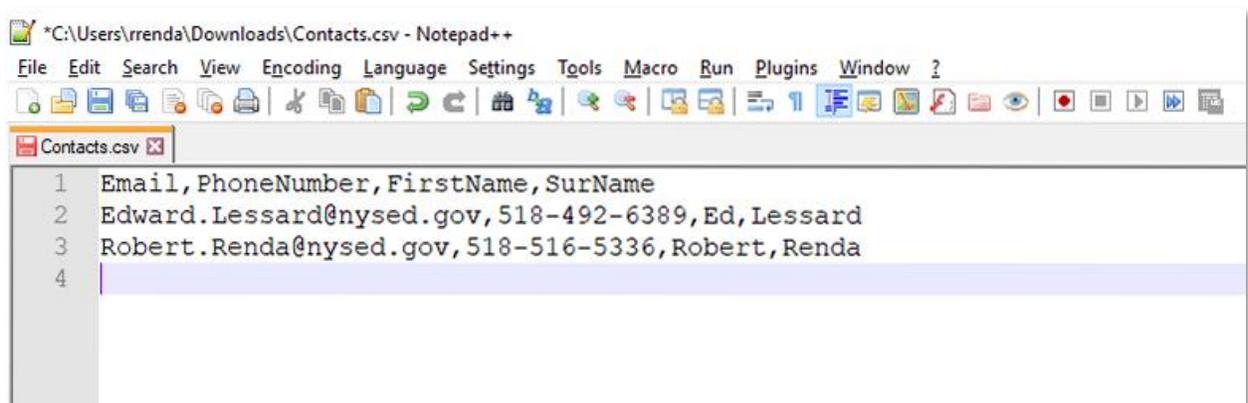


## Importing Contact Information

You can import a .CSV file to populate your contact list. YakChat provides a template called **Contacts.csv** that will provide you with the proper format and order the data needs to be arranged. Select the + New Contact as shown above to bring up the *Import Phone Numbers CSV* tab. Then click the *Click here to download Template of Adding Contacts* link.

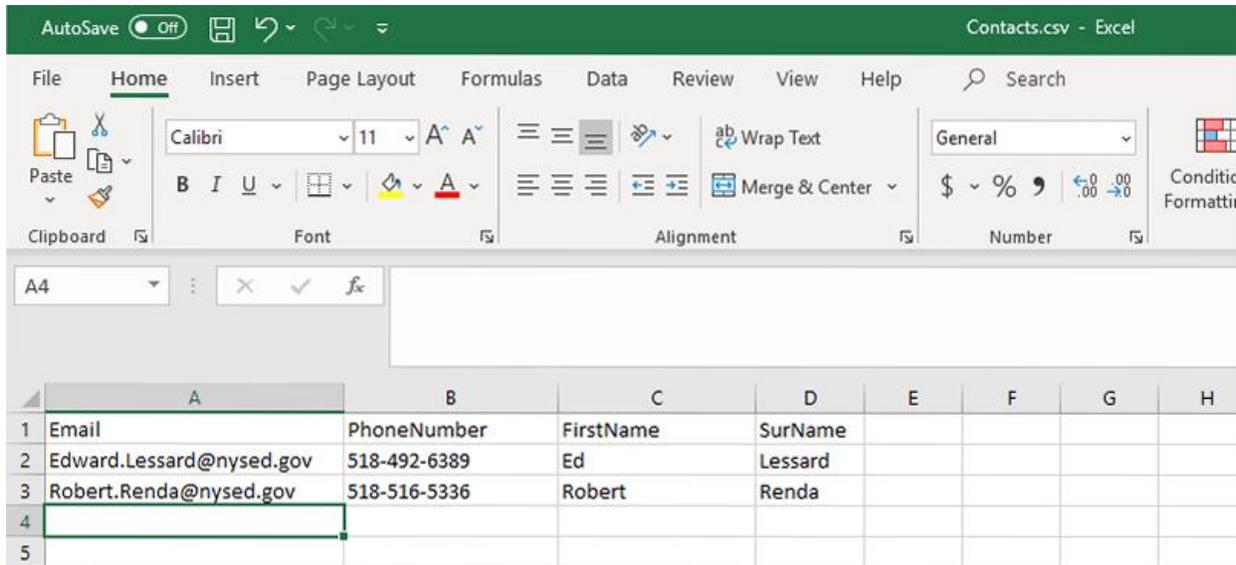


In the following screenshot, the **Contacts.csv** file has been downloaded and a simple text editor is being used to add the contact information needed before the file is imported. Row or Line 1 is the *header* information and also serves as a reminder of the order the contact elements need to be arranged if using this type of method.

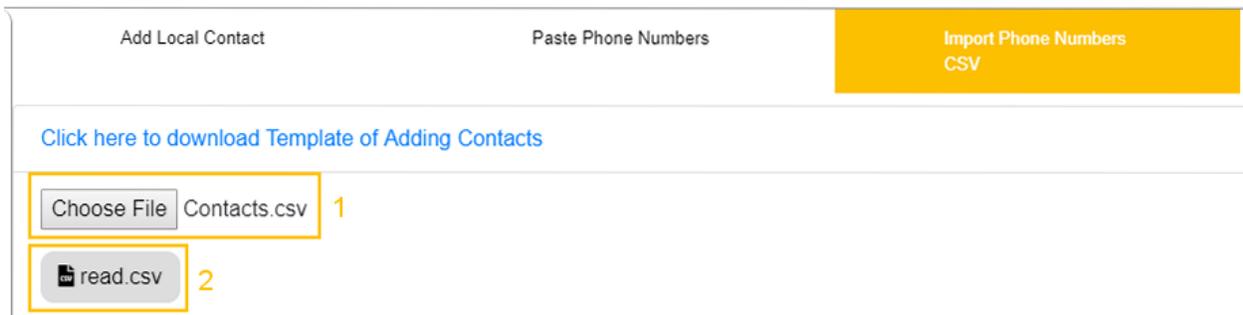


**Remember, the PhoneNumber field must be a valid cell phone number capable of text/sms messaging. Your assigned phone number that displays on the phone of the person receiving your YakChat message is a virtual number and will allow you to view responses and does not accept phone calls – only text/sms messages from other cell phones, not other virtual numbers that your colleagues who are using YakChat will have as well. Use Teams messaging for those types of communications.**

You can also use Microsoft Excel to create your .csv file as shown here in the next screenshot. Again, Row or Line 1 is the *header* information.



Again, the format or column order is *Email, PhoneNumber, FirstName, SurName*. If you do not have an email address or a last name for a particular contact, you can leave that field blank and the import process will populate the contact information with what it has available. First, use the **Choose File** button to browse for your **Contacts.csv** file. Once the file has been selected, click the **read.csv** button to import your contact list.

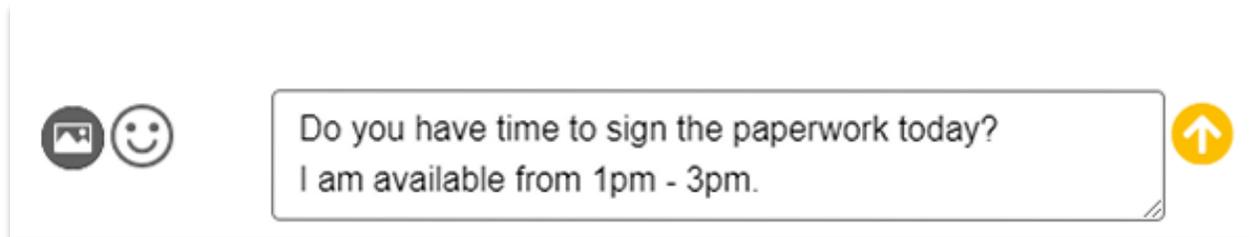


**Important Note:** There is a limit of **100 contact records** that can be imported at a time. If the need arises to import more than 100 contact records just split them up into **Contacts.csv, Contacts2.csv**, etc. and repeat the process above.

## More on Composing and Sending Messages

### Add a New Line

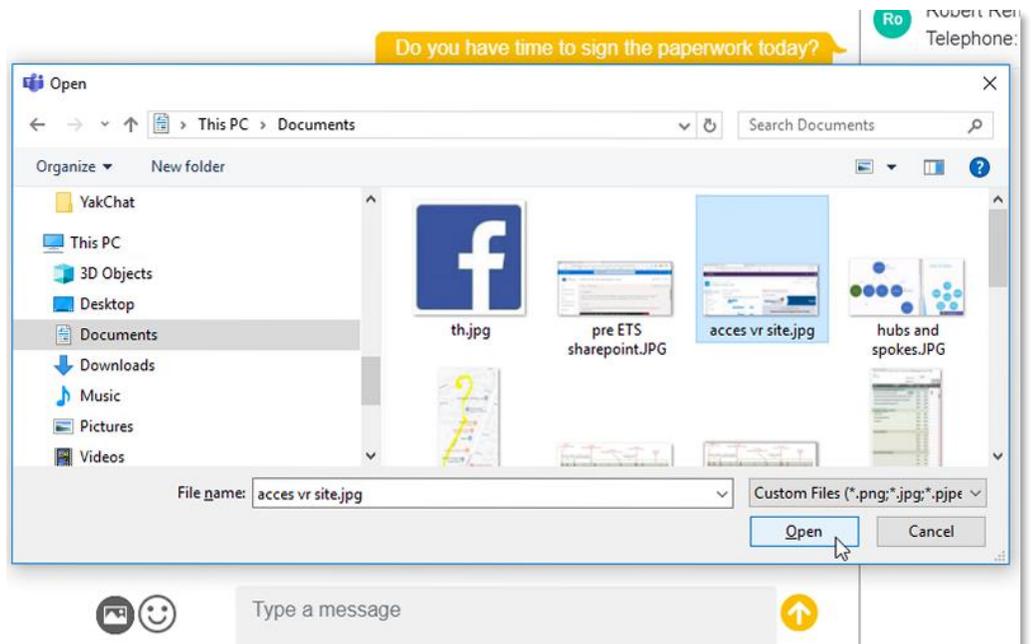
While composing your text message, you can use your keyboard to add a new line in the message if required by using *Shift + Enter*.



### Add a Picture

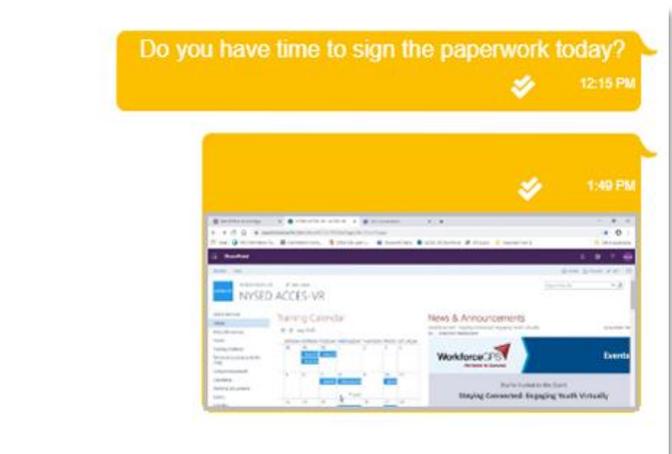
Click on the *picture icon* to add a picture to your text message. Select the picture file you wish to add to your text and click *Open*.

**Note: the file extension is case sensitive and needs to be lower case -- .jpg NOT .JPG for example.**



### Send a Picture

Send the picture, using Multimedia Messaging Service (MMS). By clicking the *send button*. Note: pressing Enter on your keyboard will not work when sending MMS, you must click the *send button*.



## Appendix

Official website: <https://www.yakchat.com/>

SMS for Microsoft Teams by YakChat demonstration:  
<https://www.youtube.com/watch?v=zxIIXKf9kaU&t=320s>

SMS for Microsoft Teams - YakBot Demonstration:  
<https://www.youtube.com/watch?v=y7iBKDUN2Wo>