



ORYELE DOCUMENTATION

Communications

Configure multi-channel outreach across SMS, email, voice, and calendar for your entire organization.

This guide covers SMS compliance and consent management, email automation with templates and delivery tracking, voice integration for inbound and outbound calling, and calendar sync with Microsoft 365 and Google Workspace.

SMS Setup and Consent Management

Oryele's SMS layer is built for TCPA compliance from the ground up. Every outbound SMS campaign requires documented consent, and opt-out requests are processed automatically with no manual intervention needed.

Provisioning Your SMS Number

- Go to Communications > SMS and click Provision Number.
- Choose a local, toll-free, or short code number based on your volume and use case.
- Complete the carrier registration form (required by US carriers for A2P 10DLC compliance).
- Registration typically takes 1 to 3 business days. You will receive a confirmation email when approved.

Consent Collection and Tracking

- Oryele stores consent records with timestamp, IP address, and the consent language shown.
- Use the built-in Consent Form builder to create compliant opt-in forms for your website or client portal.
- Consent status is attached to each contact record and checked automatically before every SMS send.
- Contacts without valid consent are silently excluded from SMS sends. A compliance report shows excluded contacts.

Opt-Out Handling

- Any inbound STOP, UNSUBSCRIBE, CANCEL, END, or QUIT reply is processed instantly.
- Opted-out contacts are blocked from future SMS sends at the platform level.
- A confirmation message is automatically sent to the contact acknowledging their opt-out.
- Opt-out records are retained in the audit log indefinitely regardless of retention policy.

Legal Note

TCPA violations carry per-message penalties. Never import a contact list and send SMS without first verifying documented consent for each recipient. Oryele's consent gates are designed to prevent accidental non-compliant sends.

Email Automation

Oryele's email layer integrates with your existing Microsoft 365 or Google Workspace domain, so all automated emails come from your firm's domain rather than a third-party address.

Building Email Templates

- Go to Communications > Email Templates and click New Template.
- Use the drag-and-drop editor or paste raw HTML for full design control.
- Insert merge fields using the {{field_name}} syntax for personalization.
- Preview the template with sample data before saving to catch rendering issues.

Sending from Workflows

- Add a Send Email step to any workflow and select a template.
- Map workflow variables to the template's merge fields.
- Set a From address (must be a verified mailbox in your connected workspace).
- Enable delivery tracking to log opens and clicks back to the contact's activity record.

Delivery Tracking and Reporting

- The Email Reporting dashboard shows sent, delivered, opened, clicked, bounced, and unsubscribed counts.
- Click any metric to drill down into the individual contacts behind it.
- Bounced addresses are automatically suppressed from future sends after two consecutive hard bounces.
- Export delivery reports as CSV for integration with your firm's reporting tools.

Voice Integration

Oryele's voice layer connects to your existing business phone system to enable inbound call routing and outbound voice automation.

Connecting Your Phone System

- Oryele supports SIP trunk integration with major business phone platforms.
- Go to Integrations > Voice and enter your SIP provider credentials.
- Configure DID (Direct Inward Dial) numbers to map to Oryele inbound routing rules.
- Test inbound and outbound call paths using the built-in call simulator.

Inbound Call Routing

- Define routing rules based on caller ID, time of day, or IVR selection.
- Route calls to a digital worker for triage or directly to a human agent queue.
- Voicemail recordings are transcribed automatically and attached to the contact record.
- Missed calls trigger a callback workflow if configured in the routing rules.

Outbound Voice Automation

- Outbound calls are initiated by workflow steps with a Call step type.
- Choose between automated message delivery or live agent handoff after initial greeting.
- All outbound calls are recorded and stored per your retention policy.
- TCPA compliance: outbound calls to mobile numbers require the same consent as SMS.

Calendar Sync

Oryele's calendar sync keeps your Microsoft 365 and Google Calendar instances in lockstep with scheduling workflows, so digital workers can book, reschedule, and cancel meetings without manual coordination.

How Sync Works

- Oryele polls connected calendars every 5 minutes by default (configurable down to 1 minute).
- New events created by a workflow appear in the connected calendar within the next sync cycle.
- Changes made directly in Microsoft or Google Calendar are reflected in Oryele after the next poll.
- Conflicts detected during sync are flagged in the worker's exception queue for human review.

Scheduling Automation

- Use the Find Available Time action to query participant calendars before booking.
- The action respects each participant's working hours, buffer time between meetings, and blocked periods.
- Once a time is selected, a calendar invite is generated and sent to all participants automatically.
- Meeting rescheduling triggers a cancellation of the original event and creation of a replacement.