

## How to send text messages via SMS in IQ

**Market:** House

**Module:** Messages

**Purpose:** This guide provides instruction on how to use IQ to send text messages via Short Messaging Service (SMS).

### Key Benefits

By using SMS in IQ, you have the capability to send text messages to constituents.

1. **Individual-** You can send text messages to individual constituents in IQ (e.g. status of their casework, academy nominations) or send text messages to a Representative.
2. **Blasts-** You can send a text “blast” to a large list of constituents (e.g. event promotions, constituent services, legislation on the floor, etc.)

## How to Text Messages to Individual Contacts / Setting up Twilio Account

To message constituents from IQ, your Office must first have a shared account with our partners at [Twilio](#). Afterwards, contact your IQ Consultant to facilitate the one-time account setup and integration. Once completed, your office has the option to:

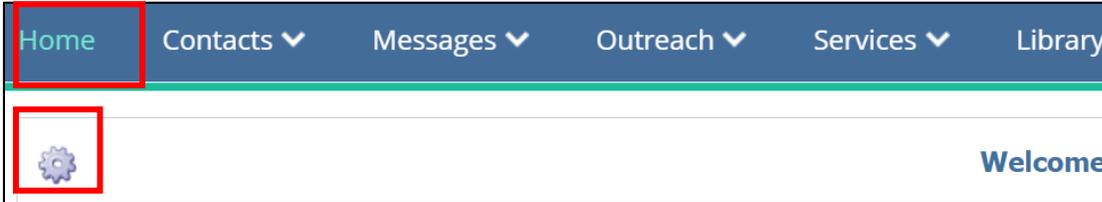
1. Set-up a 10 digit phone number and allow constituents to text their member of Congress.
2. Capability for district staff to follow-up with a constituent via their open constituent service – we primarily see this for casework and academy nominations.
3. Initiate an SMS to the primary constituent in the service record from within the service itself.
4. Retroactively associate SMS message(s) with a constituent to a service record using the ID#.

Texting within IQ gives offices the latitude to communicate with their constituents aside from emails and calls. Like social media messaging, our approach to text messaging is to treat it the same as any other form of communication from constituents, with a familiar interface and process.

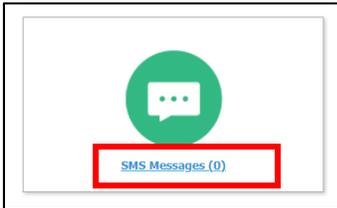
## How to Access or Add SMS Tile

We have an SMS tile for your homepage to easily be able to view any pending text messages.

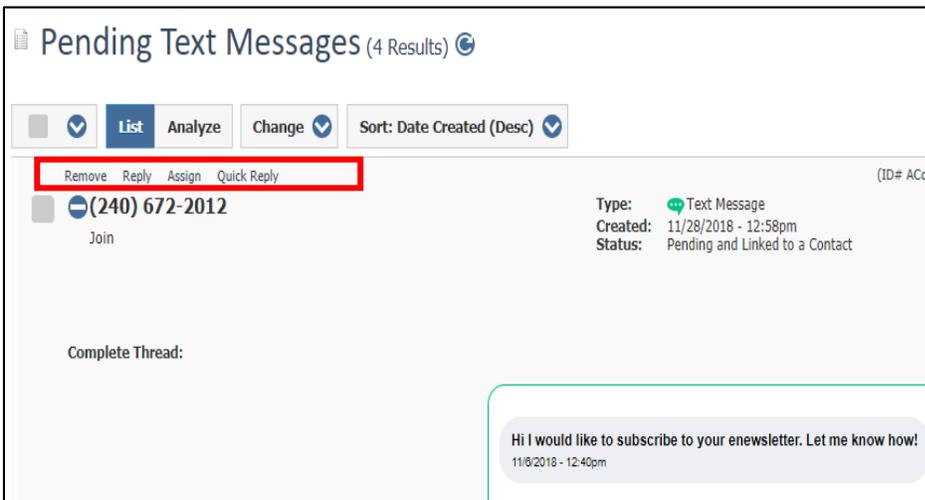
1. If not yet visible on the Home module, add this tile by clicking the gear icon.



2. A list of IQ tile names is displayed in a new window. Select **SMS Messages**. Contact your IQ Consultant if you do not see this tile option.
3. Once selected, the tile will display at the bottom of the Home page.
4. Click the link. You will be redirected to a page that will display a list of pending SMS messages



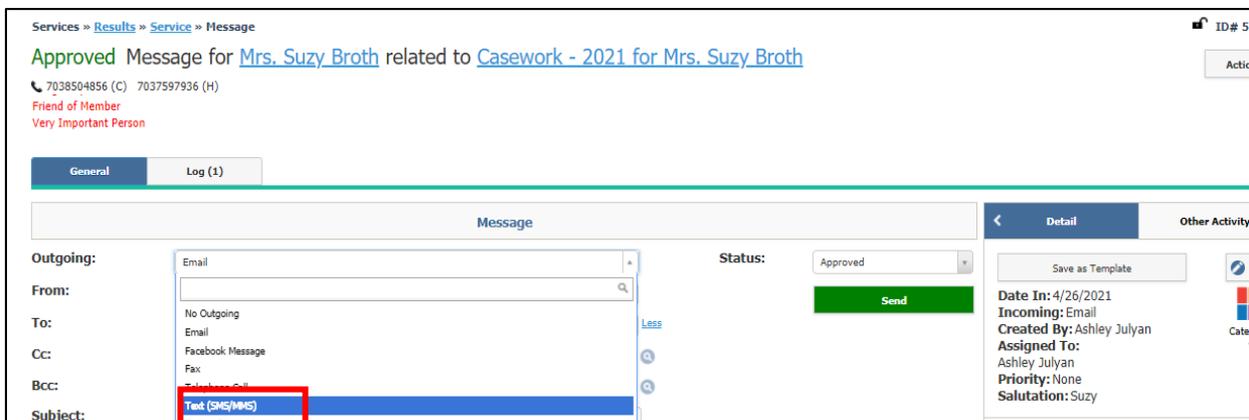
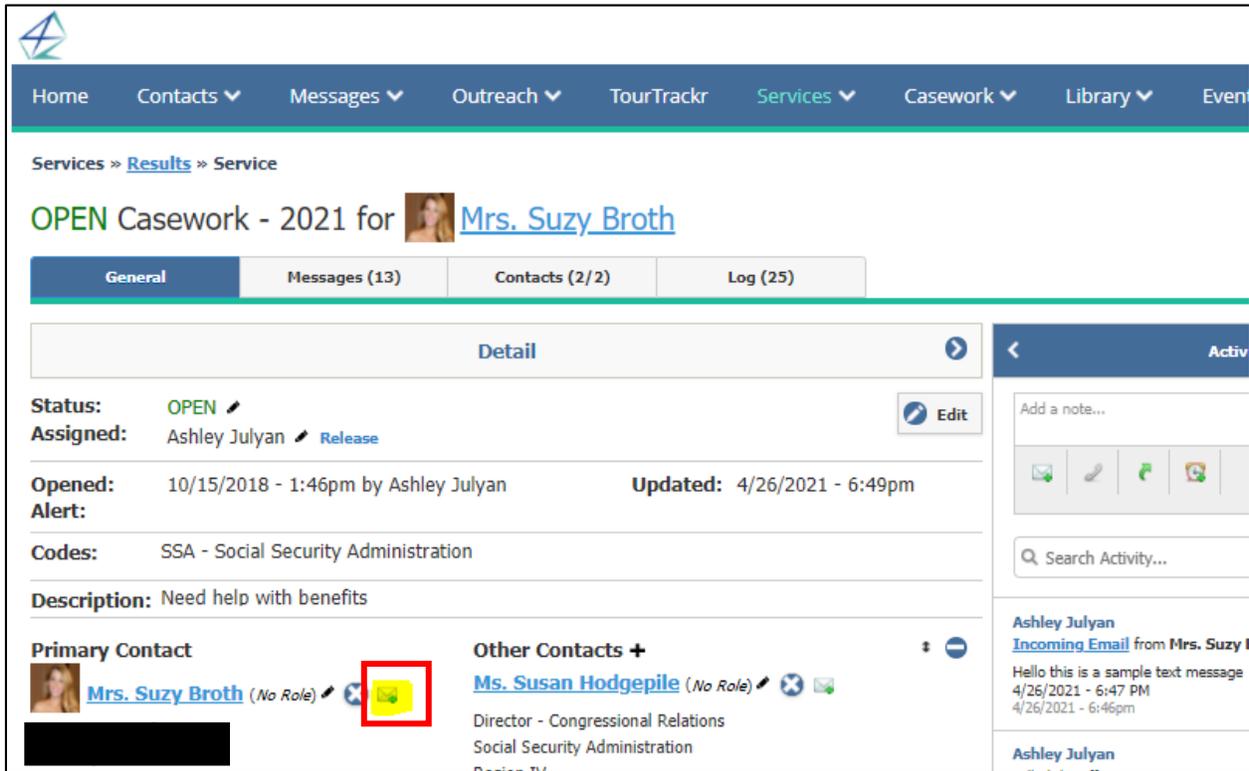
5. You will see the following in-row actions.



- **Remove:** removes text messages from the queue
- **Reply:** reply to a text message
- **Assign:** routes the message to another staffer only
- **Quick Reply:** sends as an immediate response. This creates an IQ Message record and closes the text message record

## How to send a text message within a Service Record

1. If you wish to send a text message to the constituent from a casework record, select the mail icon next to the primary contact's name and then change the outgoing method to SMS.

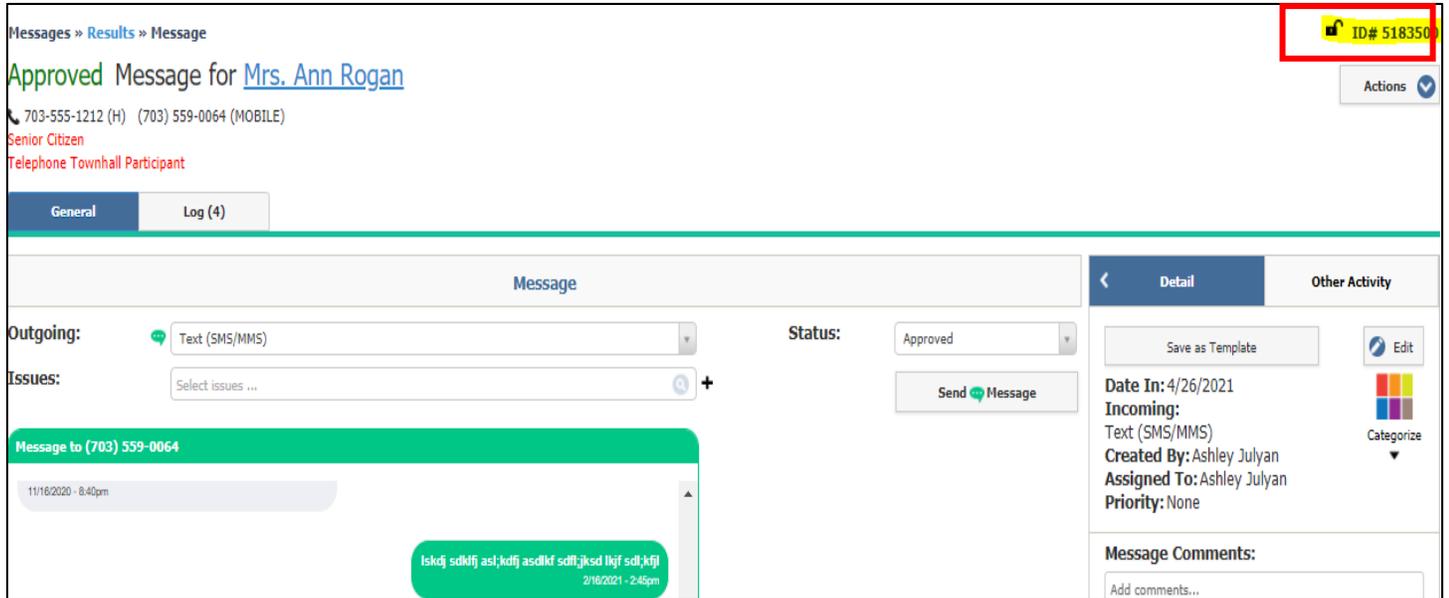


2. Once your message is drafted and ready-to-go, hit the  button. If you don't see this button, confirm with your IQ Consultant on your account rights to send outgoing texts. Once sent, the text will be attached to the casework.

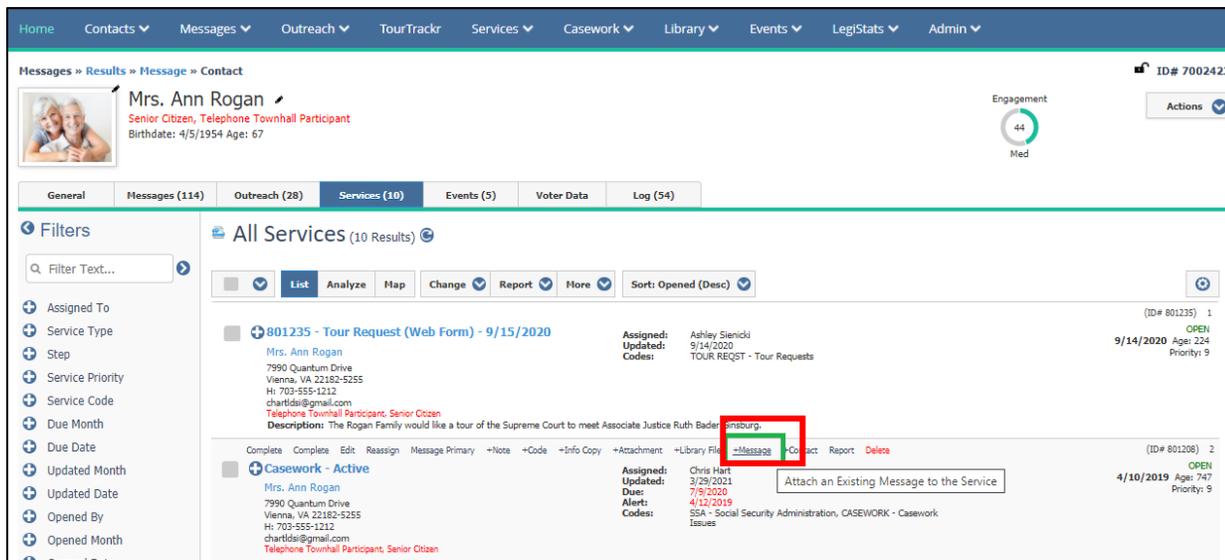
## How to attach text messages to a service record

Staff may also retroactively attach text messages to a service record or attach message records from the pending SMS queue. If you are replying to a message from the pending SMS queue and want to tie it to a piece of casework, follow the steps below.

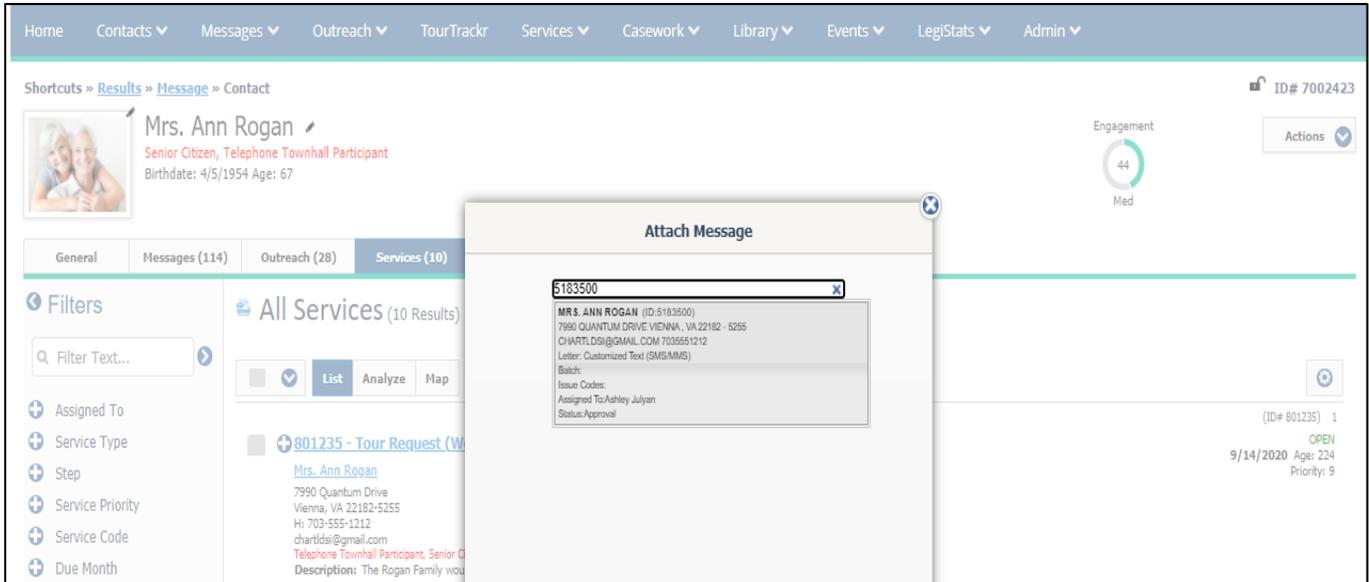
1. Text Messages can be attached to an open service by capturing the ID# of the message in the top right corner of the window and copying the ID#.



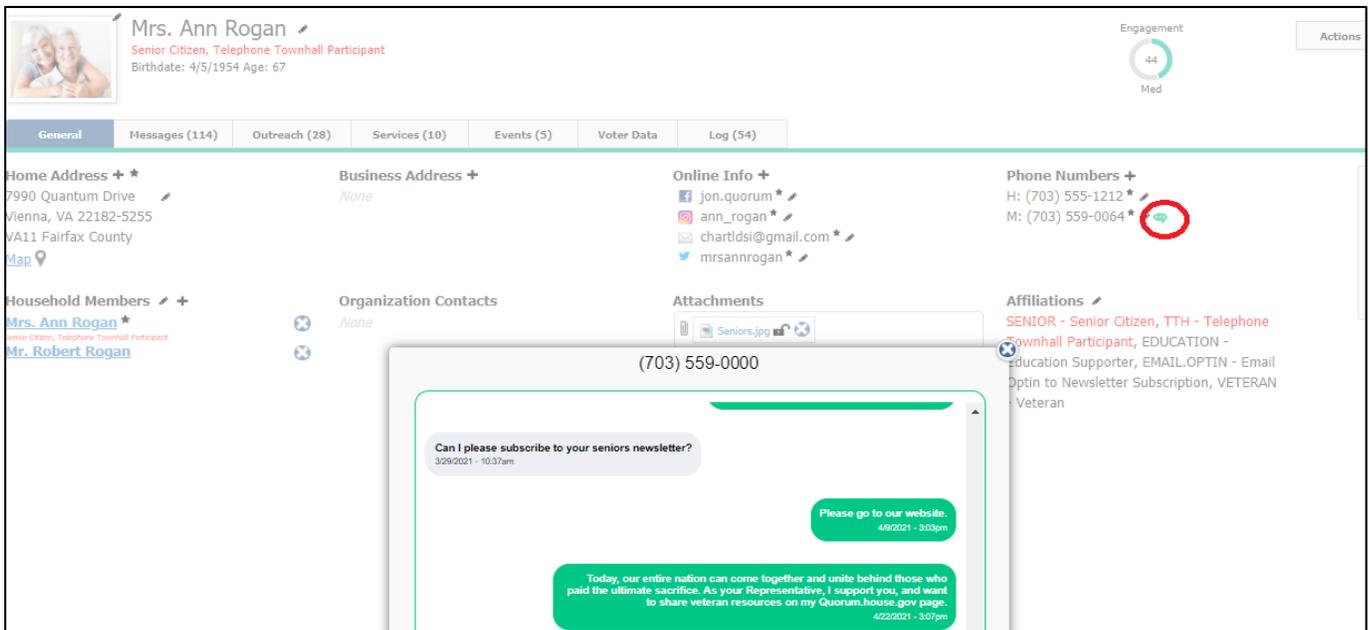
2. From the open service record use the **+Message** in-row action.



- Once the text message is attached, you'll see the service record is updated and your most recent text will appear in the expanded zone of that case and within the detail tab of the casework record.



- Additionally, you'll see an entire text message thread in a constituent's contact record denoted with the green SMS bubble next to the phone number.



To inquire pricing options for your Twilio account, contact IQ Sales via <https://www.intranetquorum.com/contact-us>

## How to send “mass” SMS Communication or text “blast” Campaigns

This option is recommended if your goal is to reach 10,000 users or more. We work with our Leidos IQ partners at [Broadnet](#), which is the same partner we use for Telephone Town Halls.

For mass communications, notify your Leidos Account Manager to execute a one-time account set-up – this account usually takes ~24 hours to create. In order to create the account we will need to know the following details for Part I Account Configuration, and Part II Broadcast Information

**Part I Account Configuration:** We will secure a toll-free number from which the messages will originate. This toll-free number will display on participant phones with the message. When called, this number must connect to something. Below are the options that may be used.

- **Transfer number to office** (please provide number)
- **Use a Generic Sound File**
  - **Script:** *Hello. You may have recently received a text message from this number. To opt out of future texts, please reply “Stop” to the original message. Thank you.*
- **Use Custom Recording** (recommendations below) - We can use the Custom Caller ID sound file, however it does state, "I was calling to invite you...." which may be confusing as these participants will be receiving a text not a call.
  - The full Representative’s name or Office responsible for the text
  - Contact Information
  - Opt out instructions
    - **Sample Script:** *Hi, this is \_\_\_\_\_. You may have recently received a text message from our office. We’d love to connect with you. If you want to opt out of future text messages, you can do that by replying STOP on the message you received. Otherwise, if you’d like to speak to someone at our office, you can contact us directly by calling xxx-xxx-xxxx or by emailing us at email@name.xxx. Thank you and have a wonderful day.*

Once you have confirmed one of the above options, we will set up your account. **Please keep in mind that it can take up to a full business day to set up the account after the above has been confirmed.**

### Part II: Broadcast Information

In addition to setting up the account, we will also need the below information in order to set up the broadcast.

- **Date and Time of Broadcast:** Please note that we can broadcast about 50,000 text messages/hour and curfew restrictions will apply to all messages.

- **Message to be sent:** In order to remain compliant, this message must contain an opt out option – we recommend ‘STOP2Stop’
- **Test phone number:** We will send a sample text message to this number prior to broadcasting to the full list. This message must be reviewed and approved before we set up the full broadcast.
- **List of mobile numbers:** Connect with your IQ consultant to determine the list *size* and *criteria* of the mobile numbers you’d like to reach. We will pull that list for you, and ensure it’s uploaded into the system.