Sending text messages via SMS

Market: House

Description: These instructions teach users how to use IQ to send text messages via Short Messaging Service (SMS). 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 <u>Twilio</u>. 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 view any pending text messages.

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

Home	Contacts 🗸	Messages 🗸	Outreach 🗸	Services 🗸	Library
ت					Welcome

- **2.** A list of IQ tile names is displayed in a new window. Select **All 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
- Search Contacts: search for contacts to message
- 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.

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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.

\bigstar								
Home	Contacts 🗸	Messages 🗸	Outreach 🗸	TourTrackr	Services 🗸	Casework	🗸 🖌 Library	Event
Services	» <u>Results</u> » Servi	ce						
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Status: Assigned	OPEN 🖌	Release				🔗 Edit	Add a note	
Opened: Alert:	10/15/201	8 - 1:46pm by Ashle	ey Julyan	Updated	: 4/26/2021 -	6:49pm	≅ 2 ē	G
Codes:	les: SSA - Social Security Administration							
Descript	ion: Need help	with benefits						
Primary	Primary Contact Other Contacts + Image: Contact in the contact in th							
			Social Security	Administration			Ashley Julyan	
Services = Res	Message for Mr	rs. Suzv Broth relate	ed to Casework -	2021 for Mrs. 9	Suzy Broth			10# 5
Friend of Member Very Important ((c) 7037597936 (H) r Yarsen							ACD
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Boci	Fas	-		0			Priority: None	
Subjects	Test (245/1445)					5	Salutation: Suzy	

Page **3** of **7** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos. 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#.

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、703-555-1212 (H) (Senior Citizen Telephone Townhall Par	703) ! icipa	559-0064 (MOBILI nt	E)							
General		Log (4)								
				Mes	sage				C Detail	Other Activity
Outgoing:	۹(Text (SMS/MMS)				Ŧ	Status:	Approved *	Save as Template	💋 Edit
Issues:		Select issues			9	+		Send 😋 Message	Date In: 4/26/2021 Incoming:	
Message to (703) 559	0064	4							Text (SMS/MMS) Created By:	Categorize
11/16/2020 - 8:40pm						•			Assigned To: Priority: None	
				lskdj sdklfj asl;kdfj asdl	kf sdfl;jksd lkjf sdl;kfjl				Message Comments:	
					2/16/2021 - 2:45pm				Add comments	
_			_		+Message		_			

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



🕂 Intranet Quorum 🏲 leidos

3. 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.

Home												
Shortcuts	<u>Results</u> » <u>Messa</u>	g <u>e</u> » Contact										■ ID# 7002423
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Service	е Туре		801235 - Tou	r Request (W								OPEN
Step			Mrs. Ann Rogan									9/14/2020 Age: 224 Priority: 9
Servic	e Priority		7990 Quantum Driv Vienna, VA 22182-5	e 255								
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 Due M 	Ionth		Telephone Townhall I Description: The	Participant, Senior C Rogan Family wou								

4. 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.

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Mrs. Ann Senior Citizen, Te Birthdate: 4/5/193	Rogan ephone Townhall Participant 54 Age: 67		Engagement 44 Med
General Messages (114)	Outreach (28) Services (10) Even	ts (5) Voter Data Log (54)	
Home Address + * 7990 Quantum Drive Vienna, VA 22182-5255 VA11 Fairfax County Map 9	Business Address + None	Online Info + f jon.quorum * / @ ann_rogan * / mrsannrogan * /	Phone Numbers + H: (703) 555-1212 * M: (703) 559-0064 *
Household Members / + <u>Mrs. Ann Rogan</u> * more Clam. Telephone Twendal Participant <u>Mr. Robert Rogan</u>	Organization Contacts None	Attachments Seniors.jpg @ ③ (703) 559-0000	Affiliations S SENIOR - Senior Citizen, TTH - Telephone wwnhall Participant, EDUCATION - education Supporter, EMAIL.OPTIN - Email Dptin to Newsletter Subscription, VETERAN
	Can I please sub 3/29/2021 - 10.37am	scribe to your seniors newsletter? Please go to our we 40/2021 - Today, our entire nation can come together and unite behind those paid the ultimate sacrifice. As your Representative, I support you, and to share veteran resources on my Quorundhouse gov	v solos page
To inquire about	pricing options for your	• Twilio account, contact IQ Sales	svia

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 <u>Broadnet</u>, 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 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.