Sending SMS Text Messages in IQ5

Market: House, Senate

Description: These instructions teach users how to **send individual and mass texts** from IQ.

Click the link below to be brought to the following topic:

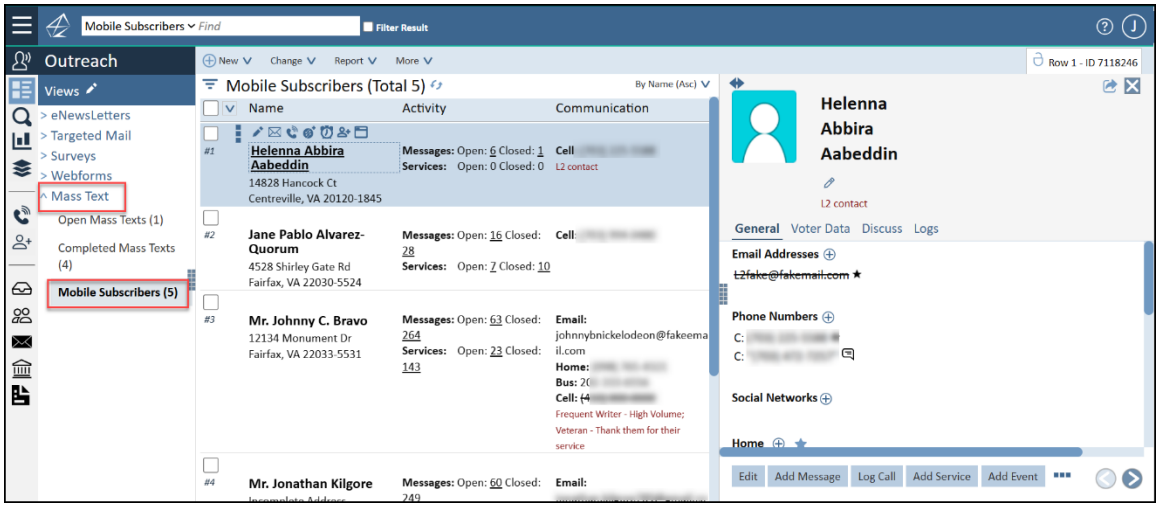
Sending Mass Texts

Reports on Completed Mass Texts

Note: To text 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.

Sending an individual text

1. Navigate to the **Outreach** application.
2. Click on **Mass Text** in the Views section.
3. Click on **Mobile Subscribers.**



Note: To add a Contact as a mobile subscriber, you must click **edit** on their contact record → **Communications → add a phone # → check the Text Optin box**.

4. Click on **Add Message.**
5. Set Outgoing Method as either **Text SMS or MMS.**
    a. **SMS:** For Texts limited to 319 characters with no images.
    b. **MMS:** For texts up to 1600 characters with one image allowed.

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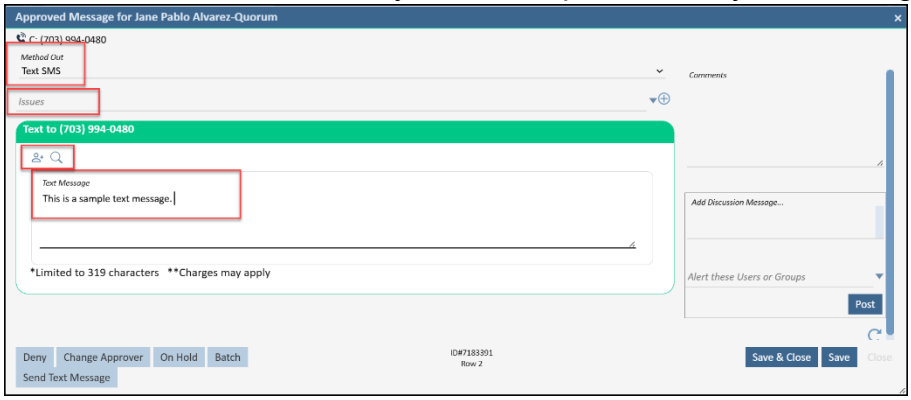
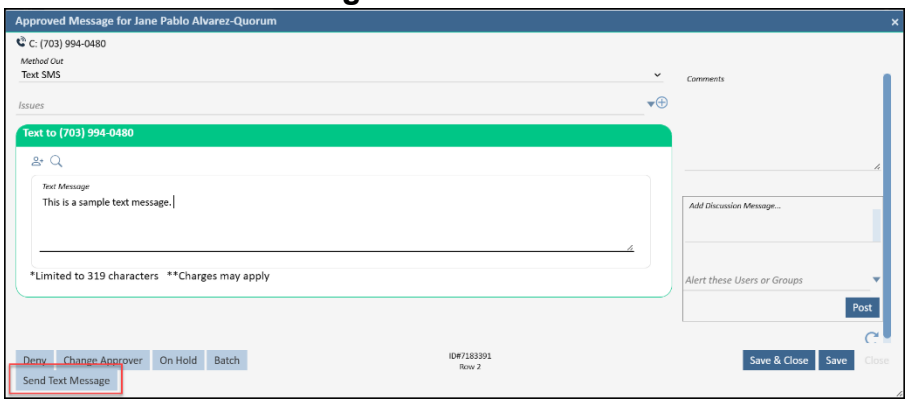
6. Add an issue code and type out your text. Sender identification is crucial. Each message must clearly identify you as the sender, except in follow up messages within an ongoing conversation. For example, you may wish to begin your Mass text with, “Hi, this is Rep. Quorum.” You can also add a webform or survey to a text message by clicking the button. The icon allows you to add quick text to your message.



7. Click **Send Text Message.**



8. After the text is sent, if the constituent responds, you can reply back in the **Messages Application** under the **Text Messaging** view.

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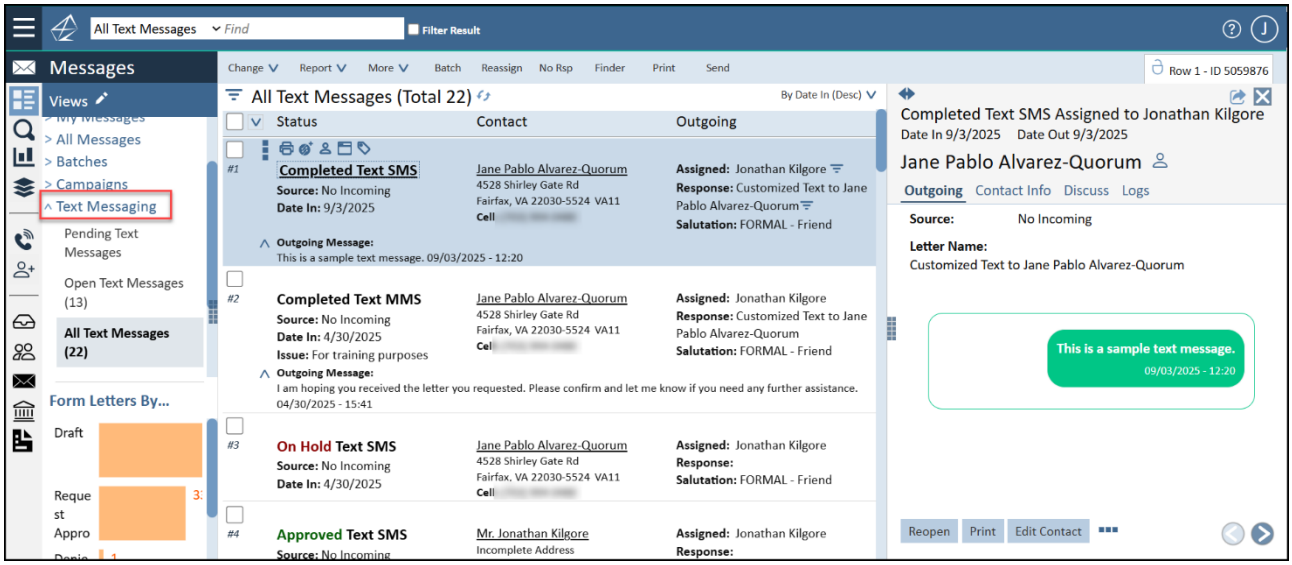

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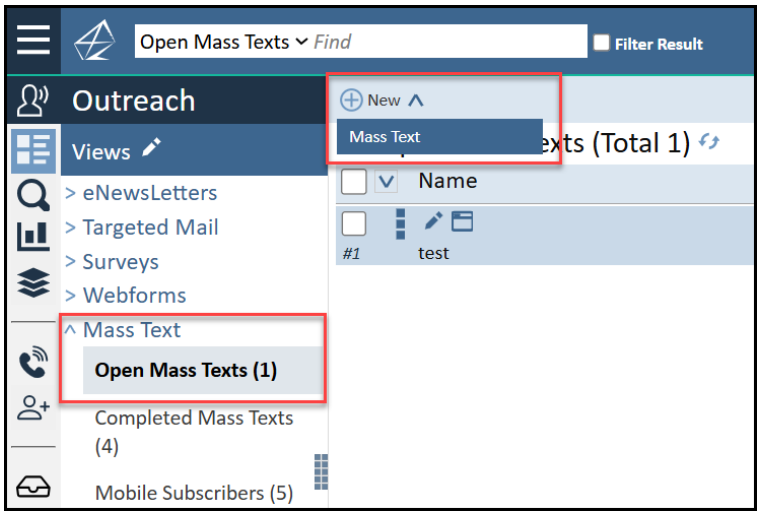
Sending Mass Texts

1. Navigate to the **Outreach** application.
2. Click on **Mass Text**.
3. Click on **Open Mass Texts.**
4. Click on **+New → Mass Text**



5. Follow the **Outreach Text Wizard** by first choosing your **Text Type.**
   a. **SMS:** For Texts limited to 319 characters with no images.
   b. **MMS:** For texts up to 1600 characters with one image allowed.
6. Type out a **Description** of the Mass Text.
7. Type out your text. Sender identification is crucial. Each message must clearly identify you as the sender, except in follow up messages within an ongoing conversation. For example,

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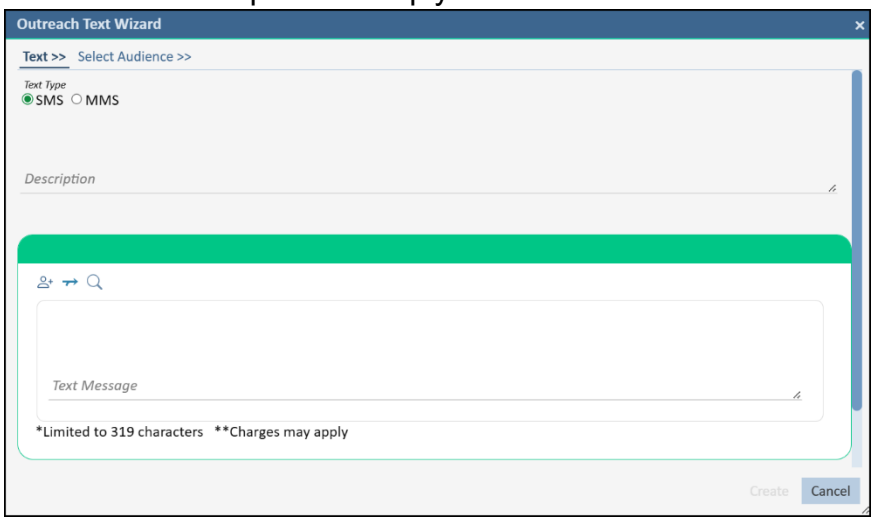
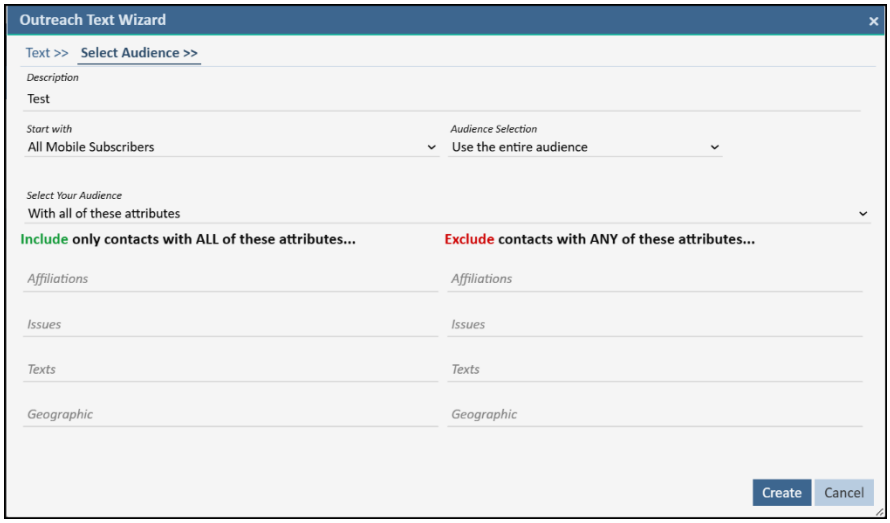
you may wish to begin your Mass text with, “Hi, this is Rep. Quorum.” You can add a survey or webform to the text. You can also insert merge codes.

8. **Ensure compliant opt-out language is included in your initial message to individuals**. Do not use one word opt-out instructions (i.e. STOP=end”). Instead, use spaces (“Reply STOP to end”).
    a. **Reply STOP To End** is the best practice for opt out language.
    b. STOP to opt out & Reply STOP to Unsubscribe also work.



9. Click on **Select Audience.**
10. Use the fields to choose who the Mass Text will be sent to. By default, **Start With** will select **All Mobile Subscribers.**



11. Click on **Create.**
12. The New Mass Text has been created. Click on **Edit → Review** for your newly created Mass Text.

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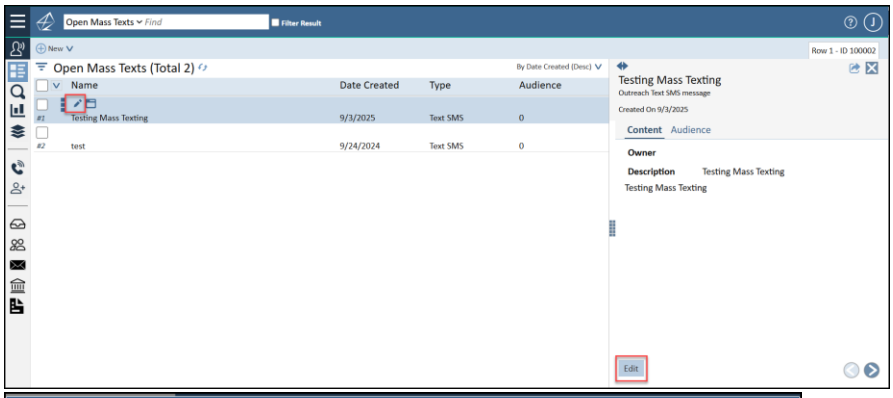

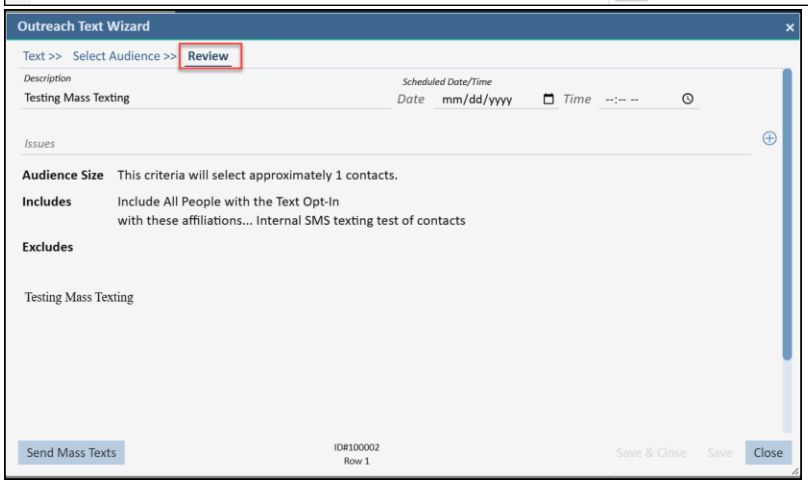

13. Choose a date and time under **Scheduled Date/Time** to schedule when your Mass Text should be sent.
    a. ***Note:** Leaving these fields blank will default to sending the Mass Text immediately.
14. Click into the **Issues** dropdown to tag the Mass Text with the appropriate Issue(s) it concerns.
15. Click **Send Mass Texts.**

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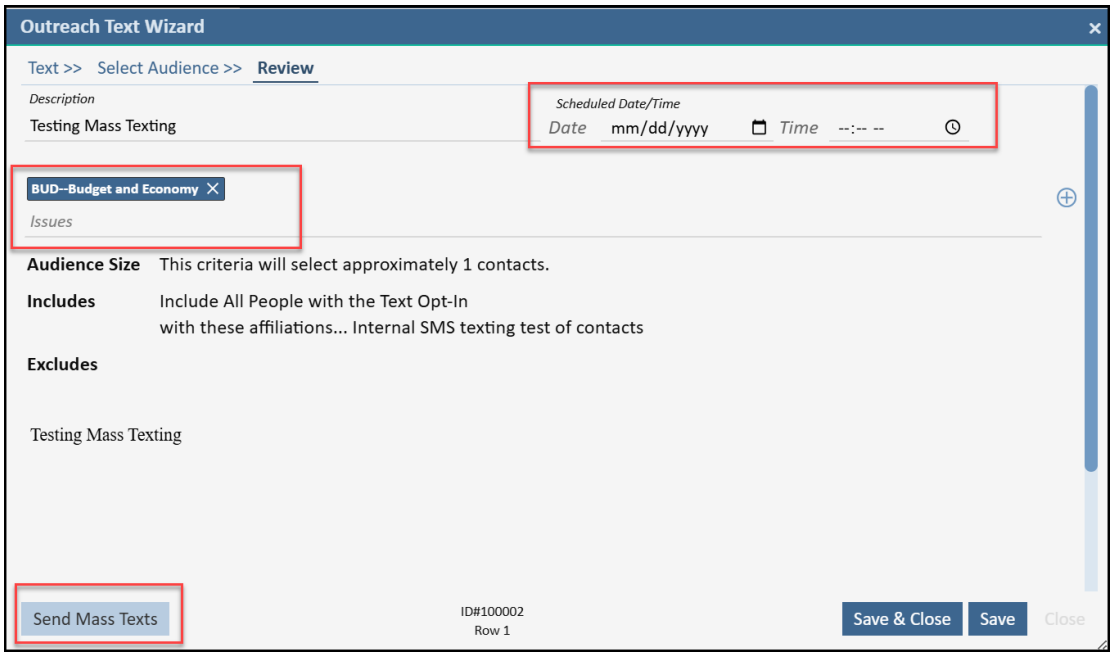
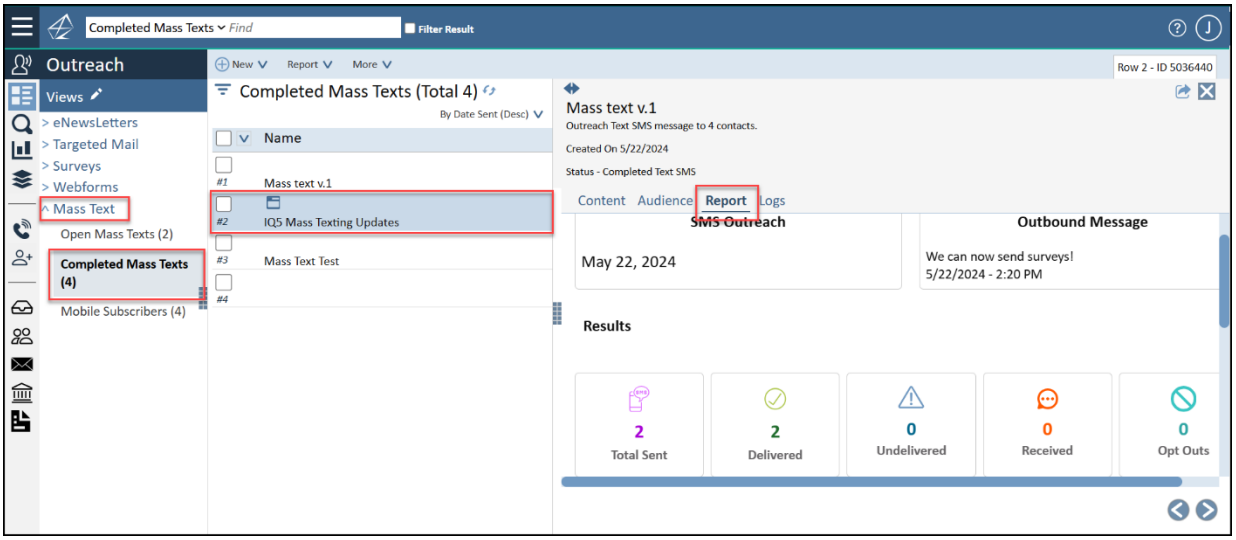


Reports on Completed Mass Texts

1. Navigate to the **Outreach** application.
2. Click on **Mass Text**.
3. Click on **Completed Mass Texts.**
4. Select a record and open the detail window. Click the **Report** tab.



5. The Report tab displays counts for Total Sent, Delivered, Undelivered, Received and Opt Outs, along with bar graphs for Outgoing and Incoming Messages with percentages for Delivery Status, Messages with errors, Messages Received and Opt-out Rate.

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