

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:

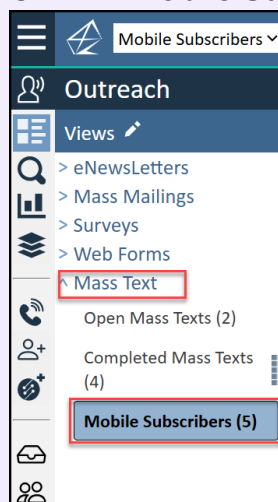
[Sending Mass Texts](#)

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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

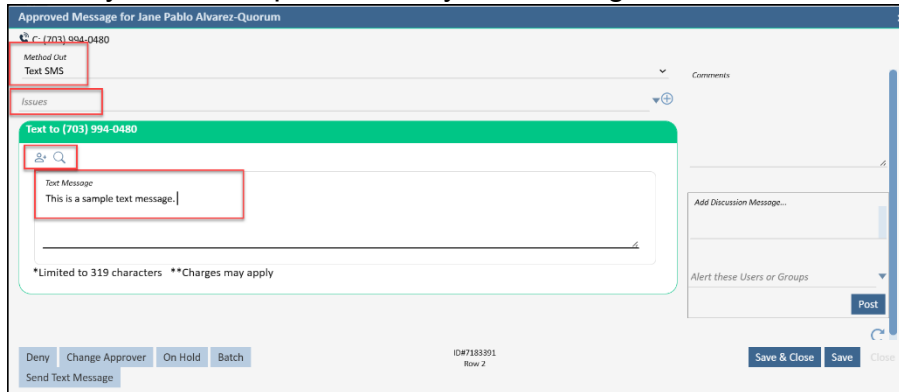
1. Navigate to the **Outreach** application.
2. Click on **Mass Text** in the Views section.
3. Click on **Mobile Subscribers**.



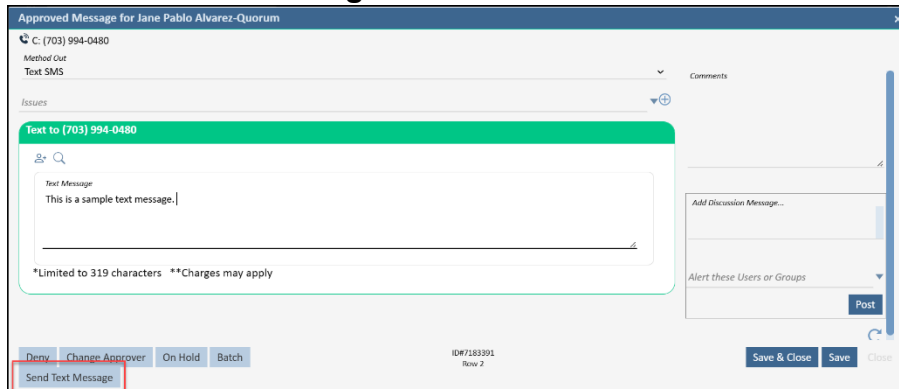
Note: To add a Contact as a mobile subscriber, you must click **edit** on their contact record → **Communications** → **add a cell phone #** → **check the Text Optin box**.

4. Click on **Add Message**.
5. Set **Method Out** 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.

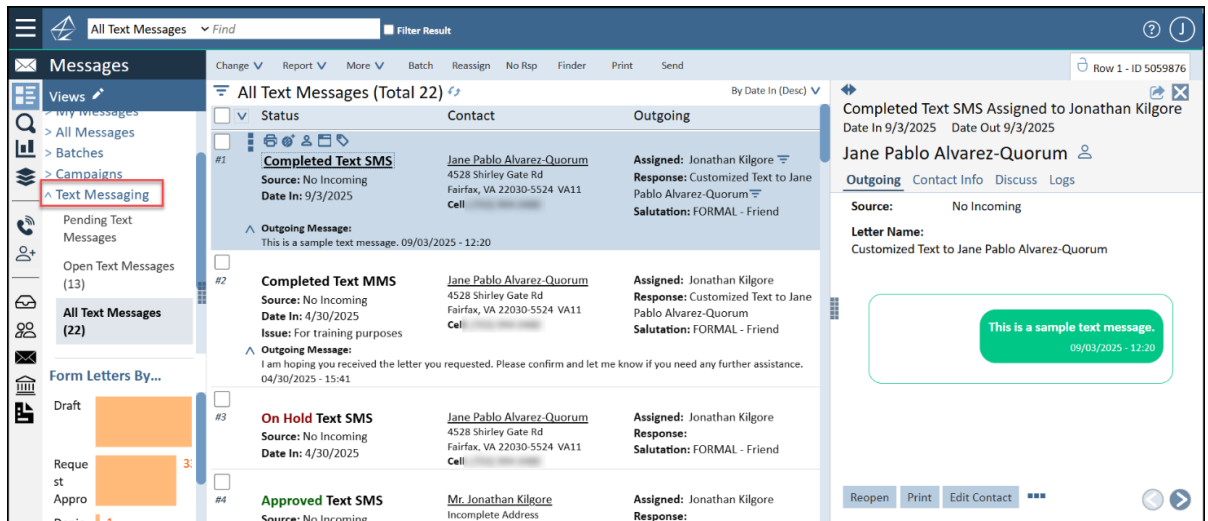
6. Add an issue code and type out your text. Sender identification is crucial. Each message must clearly identify you as the sender, except in follow up messages within an ongoing conversation. For example, you may wish to begin your Mass text with, “Hi, this is Rep. Quorum.” You can also add a webform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



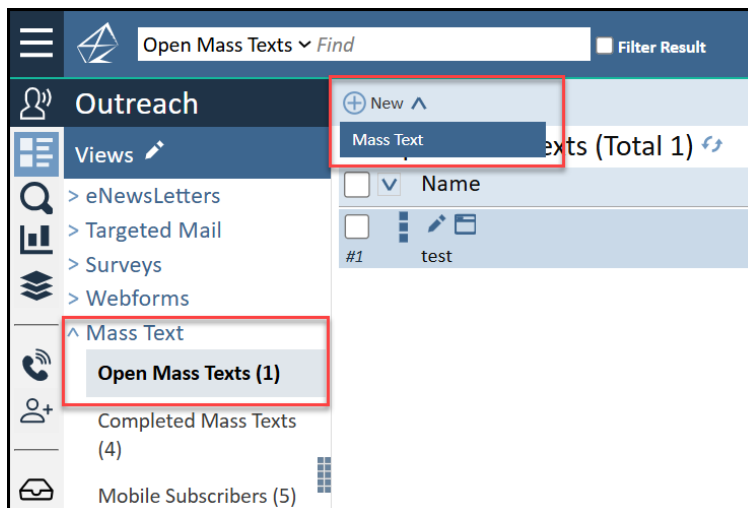
8. After the text is sent, if the constituent responds, you can reply back in the **Messages Application** under the **Text Messaging** view.



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Sending Mass Texts

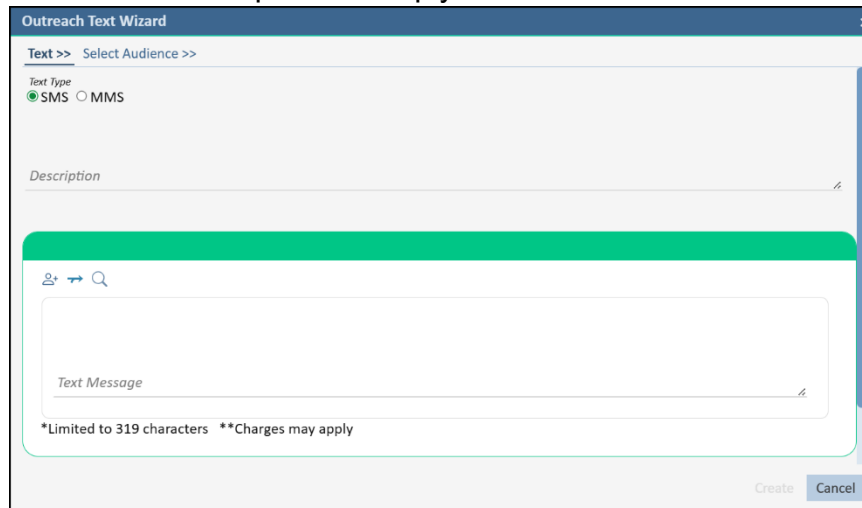
1. Navigate to the **Outreach** application.
2. Click on **Mass Text**.
3. Click on **Open Mass Texts**.
4. Click on **+New → Mass Text**



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

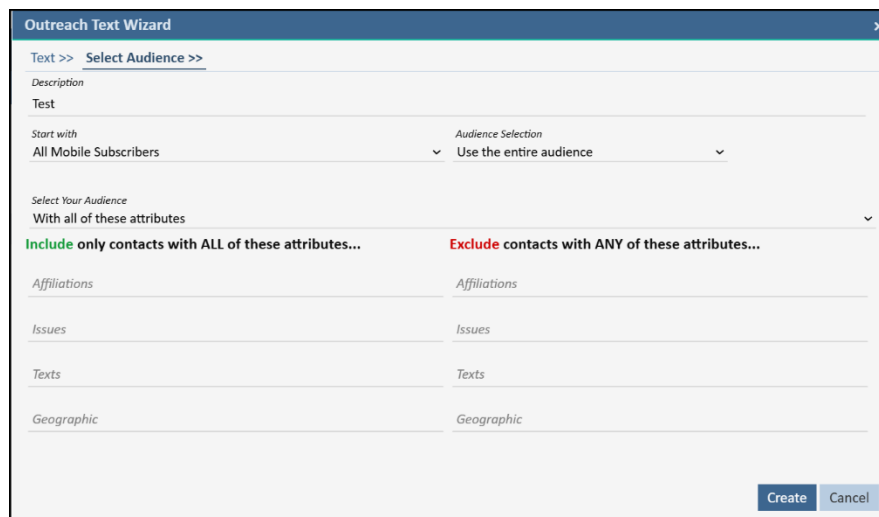
conversation. For example, you may wish to begin your Mass text with, “Hi, this is Rep. Quorum.” You can add a survey or webform to the text. You can also insert merge codes.

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.

The screenshot shows the 'Outreach Text Wizard' window with the 'Text' tab selected. The 'Text Type' section has 'SMS' selected with a green dot and 'MMS' with an empty circle. Below this is a 'Description' field. A large green header bar is present. Underneath is a search bar with a magnifying glass icon. Below the search bar is a 'Text Message' input field. At the bottom of the input field, it says '*Limited to 319 characters **Charges may apply'. At the very bottom of the window are 'Create' and 'Cancel' buttons.

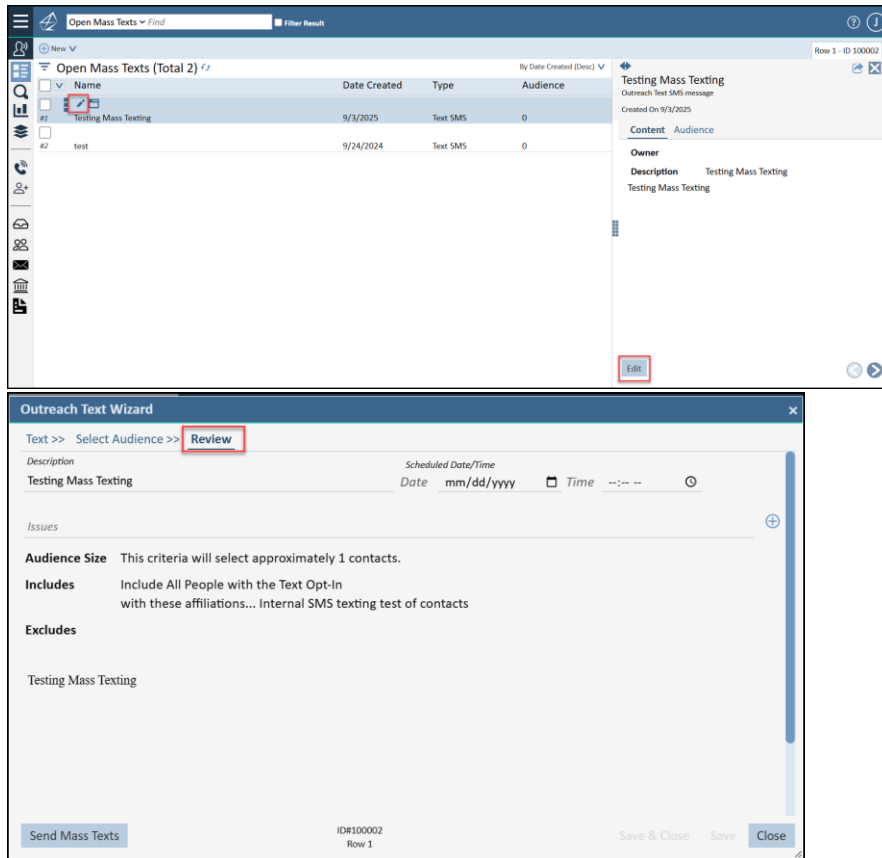
9. Click on **Select Audience**.

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

The screenshot shows the 'Outreach Text Wizard' window with the 'Select Audience' tab selected. The 'Description' field contains the word 'Test'. The 'Start with' dropdown is set to 'All Mobile Subscribers'. The 'Audience Selection' dropdown is set to 'Use the entire audience'. Below these is a section titled 'Select Your Audience' with a dropdown arrow. Under this section, there are two columns: 'Include only contacts with ALL of these attributes...' and 'Exclude contacts with ANY of these attributes...'. Each column has several input fields for 'Affiliations', 'Issues', 'Texts', and 'Geographic'. At the bottom right are 'Create' and 'Cancel' buttons.

11. Click on **Create**.

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



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**.

Outreach Text Wizard

Text >> Select Audience >> **Review**

Description
Testing Mass Texting

Scheduled Date/Time
Date mm/dd/yyyy Time --:--

BUD--Budget and Economy X

Issues

Audience Size This criteria will select approximately 1 contacts.

Includes Include All People with the Text Opt-In with these affiliations... Internal SMS texting test of contacts

Excludes

Testing Mass Texting

Send Mass Texts

ID#100002
Row 1

Save & Close Save Close

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.

Completed Mass Texts Find Filter Result

Outreach

Views

- > eNewsletters
- > Targeted Mail
- > Surveys
- > Webforms
- ^ **Mass Text**
 - Open Mass Texts (2)
 - Completed Mass Texts (4)**
 - Mobile Subscribers (4)

Completed Mass Texts (Total 4) By Date Sent (Desc)

Name
#1 Mass text v.1
#2 IQS Mass Texting Updates
#3 Mass Text Test
#4

Mass text v.1
Outreach Text SMS message to 4 contacts.
Created On 5/22/2024
Status - Completed Text SMS

Content Audience **Report** Logs

Outbound Message

May 22, 2024

We can now send surveys!
5/22/2024 - 2:20 PM

Results

Total Sent	Delivered	Undelivered	Received	Opt Outs
2	2	0	0	0

5. The Report tab displays counts for Total Sent, Delivered, Undelivered, Replies and Opt Outs, along with bar graphs for the status of Outgoing and Incoming

Messages with percentages for Delivery Status, Messages with errors,
Messages Received and Opt-out Rate.

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