

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:

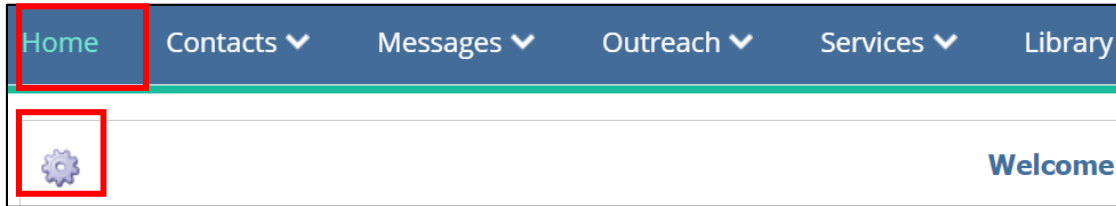
1. Set-up a 10 digit phone number and allow constituents to text their member of Congress.
2. Capability for district staff to follow-up with a constituent via their open constituent service – we primarily see this for casework and academy nominations.
3. Initiate an SMS to the primary constituent in 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.

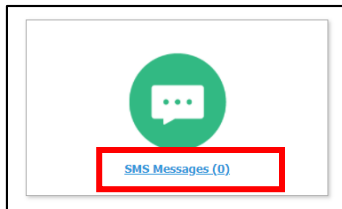
How to Access or Add SMS Tile

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

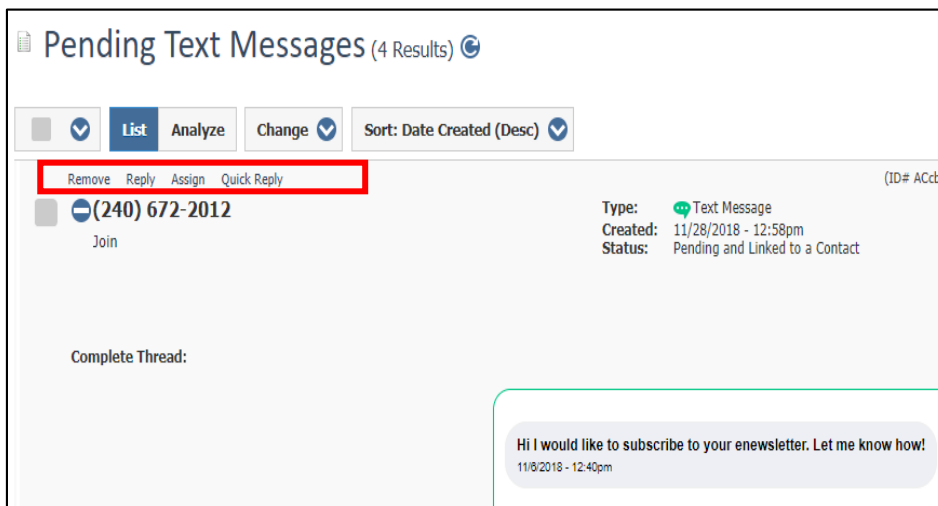
1. If not yet visible on the Home module, add this tile by clicking the gear icon.



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.

The screenshot shows the Intranet Quorum interface. The top navigation bar includes Home, Contacts, Messages, Outreach, TourTrackr, Services, Casework, Library, and Events. The breadcrumb trail is Services » Results » Service. The main heading is 'OPEN Casework - 2021 for Mrs. Suzy Broth'. Below this are tabs for General, Messages (13), Contacts (2/2), and Log (25). The 'Detail' tab is active, showing the status as 'OPEN', assigned to 'Ashley Julyan', and opened on 10/15/2018. The description is 'Need help with benefits'. Under 'Primary Contact', 'Mrs. Suzy Broth' is listed with a red box highlighting the mail icon next to her name. Other contacts include 'Ms. Susan Hodgepile'. On the right, there is an 'Incoming Email' from Mrs. Suzy Broth dated 4/26/2021.

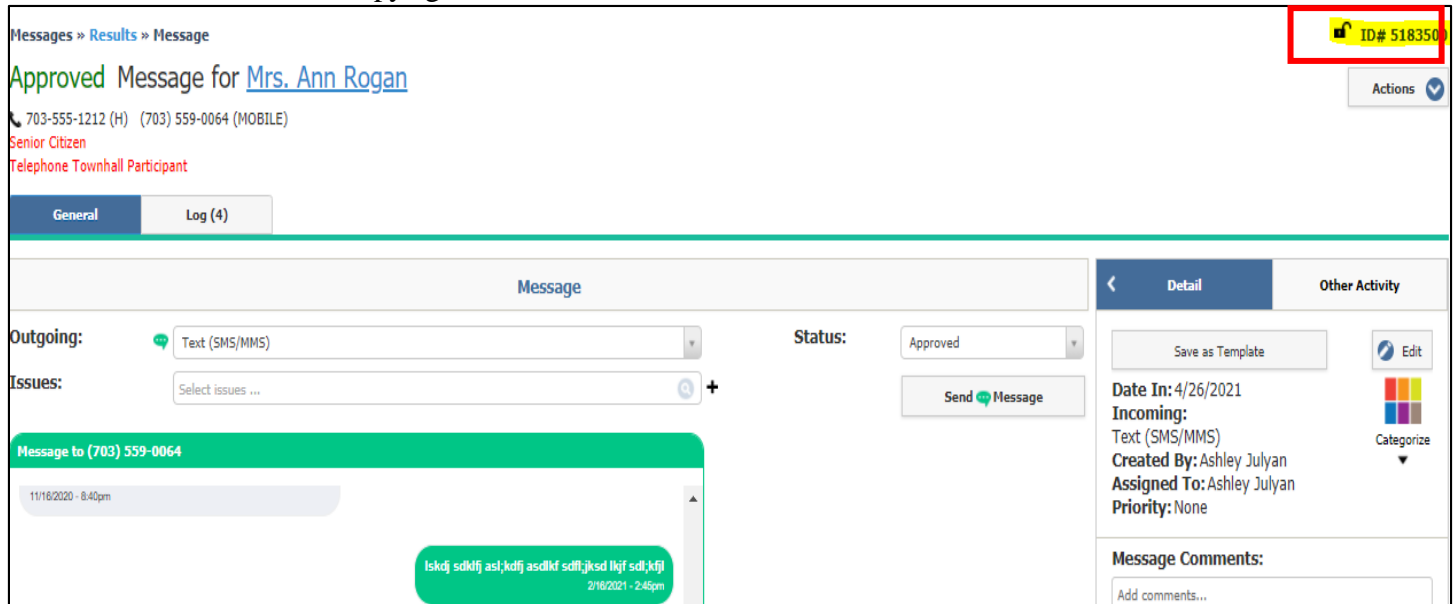
The screenshot shows the 'Message' form for Mrs. Suzy Broth. The breadcrumb trail is Services » Results » Service » Message. The main heading is 'Approved Message for Mrs. Suzy Broth related to Casework - 2021 for Mrs. Suzy Broth'. Below this are tabs for General and Log (1). The 'Message' tab is active, showing the status as 'Approved'. The 'Outgoing' tab is selected, and a red box highlights the 'Text (SMS/MMS)' option in the 'To' field. The 'From' field is empty, and the 'Subject' field is empty. On the right, there is a 'Detail' tab showing the date in as 4/26/2021, incoming email, created by Ashley Julyan, assigned to Ashley Julyan, priority none, and salutation Suzy.

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#.



Messages » Results » Message

Approved Message for Mrs. Ann Rogan

703-555-1212 (H) (703) 559-0064 (MOBILE)
Senior Citizen
Telephone Townhall Participant

General Log (4)

Message

Outgoing: Text (SMS/MMS) Status: Approved

Issues: Select issues ...

Send Message

Message to (703) 559-0064

11/16/2020 - 8:40pm

Iskdj sckljl asl;kdlf asdlkf sckljlkd lkjf sckl;kfjl
2/16/2021 - 2:45pm

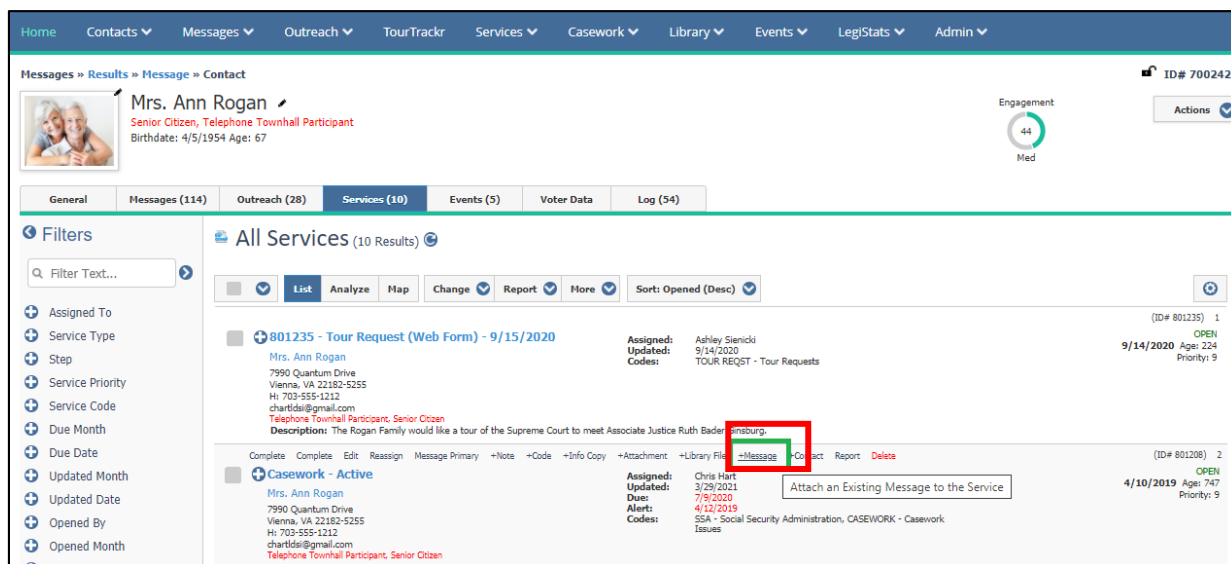
Detail Other Activity

Save as Template Edit

Date In: 4/26/2021
Incoming: Text (SMS/MMS)
Created By: Ashley Julyan
Assigned To: Ashley Julyan
Priority: None

Message Comments:
Add comments...

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



Home Contacts Messages Outreach TourTracker Services Casework Library Events LegiStats Admin

Messages » Results » Message » Contact

Mrs. Ann Rogan
Senior Citizen, Telephone Townhall Participant
Birthdate: 4/5/1954 Age: 67

Engagement 44 Med

General Messages (114) Outreach (28) Services (10) Events (5) Voter Data Log (54)

Filters

Filter Text...

All Services (10 Results)

List Analyze Map Change Report More Sort: Opened (Desc)

801235 - Tour Request (Web Form) - 9/15/2020

Mrs. Ann Rogan
7990 Quantum Drive
Vienna, VA 22182-5255
Hi: 703-555-1212
chartids@gmail.com
Telephone Townhall Participant, Senior Citizen
Description: The Rogan Family would like a tour of the Supreme Court to meet Associate Justice Ruth Bader Ginsburg.

Assigned: Ashley Sienicki
Updated: 9/14/2020
Codes: TOUR REQST - Tour Requests

(ID# 801235) 1
OPEN
9/14/2020 Age: 224
Priority: 9

Complete Complete Edit Reassign Message Primary Note Code Info Copy Attachment Library File Attach Message Contact Report Delete

801235 - Casework - Active

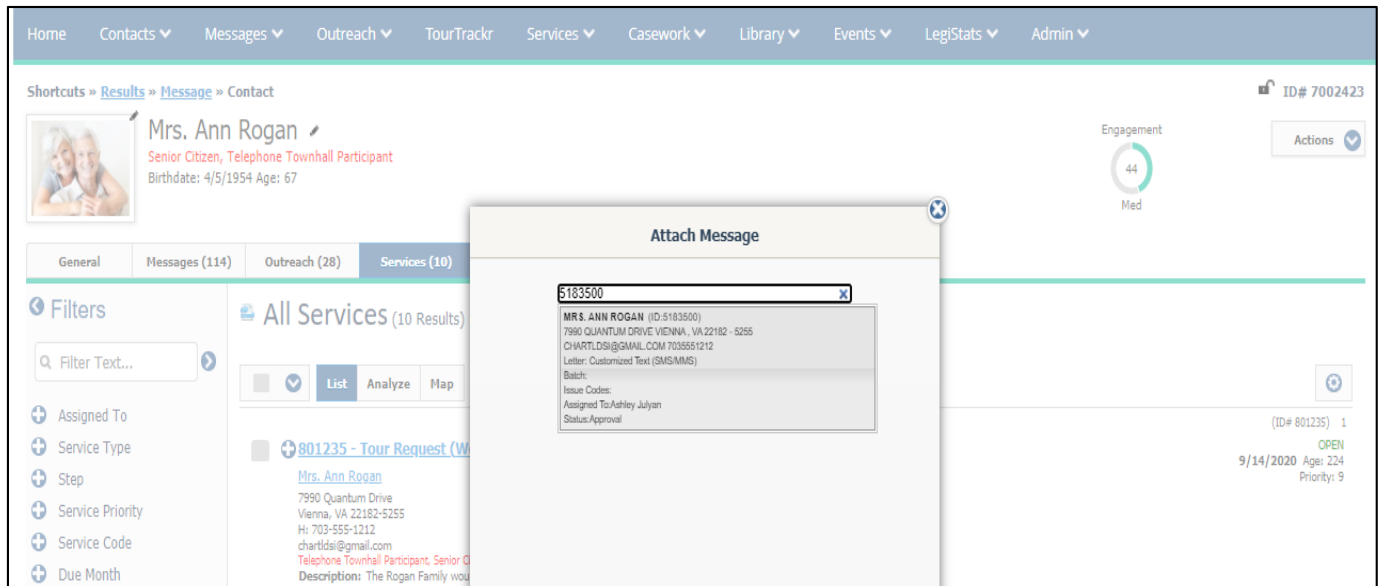
Mrs. Ann Rogan
7990 Quantum Drive
Vienna, VA 22182-5255
Hi: 703-555-1212
chartids@gmail.com
Telephone Townhall Participant, Senior Citizen

Assigned: Chris Hart
Updated: 3/28/2021
Due: 7/9/2020
Alert: 4/12/2019
Codes: SSA - Social Security Administration, CASEWORK - Casework, Issues

(ID# 801208) 2
OPEN
4/10/2019 Age: 747
Priority: 9

Attach an Existing Message to the Service

- 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.

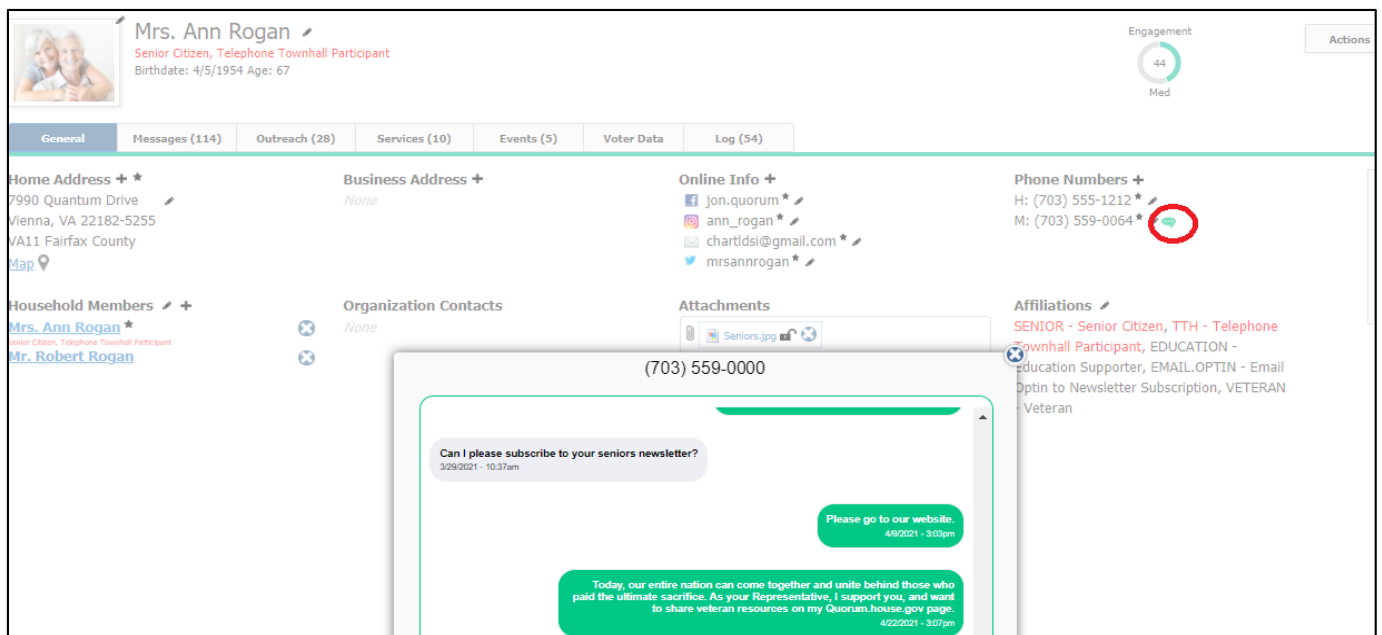


The screenshot shows the 'Attach Message' dialog box in the Intranet Quorum system. The dialog contains the following information:

- Search Bar:** 8183500
- Contact Information:**
 - MRS. ANN ROGAN (ID: 8183500)
 - 7990 QUANTUM DRIVE VIENNA, VA 22182 - 5255
 - CHARTLDSI@GMAIL.COM 7035551212
 - Letter: Customized Text (SMS/MMS)
 - Batch:
 - Issue Codes:
 - Assigned To: Ashley Julian
 - Status: Approval

The background interface shows the main contact record for Mrs. Ann Rogan. The 'Messages' tab is selected, showing a list of messages. The 'Attach Message' dialog is overlaid on top of the messages list.

- 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.



The screenshot shows the contact record for Mrs. Ann Rogan. The 'Messages' tab is selected, displaying a text message thread. A green SMS bubble is visible next to the phone number (703) 559-0064. The message thread includes the following messages:

- Message 1:** Can I please subscribe to your seniors newsletter? (3/29/2021 - 10:37am)
- Message 2:** Please go to our website. (4/9/2021 - 3:03pm)
- Message 3:** Today, our entire nation can come together and unite behind those who paid the ultimate sacrifice. As your Representative, I support you, and want to share veteran resources on my Quorum.house.gov page. (4/22/2021 - 3:07pm)

The background interface shows the main contact record for Mrs. Ann Rogan. The 'Messages' tab is selected, showing a list of messages. The 'Attach Message' dialog is overlaid on top of the messages list.

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 the Generic Sound File** (refer to addendum document)
 - **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.

ADDENDUM

Telephone Town Hall Sound File Recording Guide

Sound File Recording Studio:

To use our automated recording studio to create a sound file and load it into your account, call **800-619-5518** and enter **20426** when prompted.

- To begin recording, press 1.
- Record at the tone and press the # key when you are finished.
- The recording will stop and you will hear the following options:
 - To listen to the recorded message press 1
 - To erase and re-record press 2
 - To continue recording press 3
 - To finish recording press 4 or just hang up
 - To save and record a new message press 5 ****We recommend using this in between each recording**

Reminder Call

This is a short, automated phone message that is sent out to your list the day before your event letting them know about the upcoming Telephone Town Hall event. This message should include:

Required

- The name of the organization responsible for the call stated at the beginning of the message
- The contact telephone number for the organization

Example Script:

“Hi, this is Congressman/Senator _____. I’m calling you to invite you to participate in my upcoming Telephone Town Hall event. If votes are not called, you should expect a phone call to this number on *[Day of Week, Date, between X-X am/pm, Time Zone]* The purpose of this call is to listen to my constituents and understand which topics/issues are most important to you (include pressing issues to be discussed on the event here.) If you would prefer to participate from a different phone you can do so by calling **833-998-0870** at the time of the event, or you can stream the event by going to **mary miller DOT house DOT gov SLASH live**. If you have any questions, please call my office at XXX-XXX-XXXX. To be added to our do not call list, please press 9 now.”

Live Answer

This is the message that will play when someone picks up the phone that invites them to join the live event.

This message should include:

Required

- The name of the organization responsible for the call stated at the beginning of the message
- The contact telephone number for the organization

Example Script:

"Hi, this is Congressman/Senator _____. I am calling to invite you to join my Telephone Town Hall event taking place in just a few moments. Please just stay on the line and you will be automatically connected. If you have any questions after the event or if I can assist you in any way, please call my office at XXX-XXX-XXXX. To be added to our do not call list, please press 9 now."

**We recommend for this message to be kept short

Answering Machine

This is the message that will play when we connect to an Answering Machine. This message should include:

Required

- The name of the organization responsible for the call stated at the beginning of the message
- The contact telephone number for the organization

Example Script:

"Hi, this is Congressman/Senator _____. I called to invite you to participate in my Telephone Town Hall event taking place right now, but it appears I missed you. If this is not an answering machine, please press "1" to join me. If you get this message within 30 minutes of receiving the call, just dial **833-998-0870** to participate, or you can stream the event by going to ***mary miller DOT house DOT gov SLASH live***. If you have any questions or I can assist you in any way, please call my office at XXX-XXX-XXXX. Thank you!"

Post Event Voicemail

This is the message that plays at the end of the Telephone Town Hall event. This message should include:

- A thank you to participants for joining the event
- The instructions for participants to leave any questions or comments after the tone

Example Script:

"Thank you for participating in my Telephone Town Hall event. If you would like to leave a question or comment, please do so after the tone. Thanks again!"

Custom Caller ID**

**Please note this is specific to a Telephone Town Hall Event. Custom Caller ID message may need to be changed for other automated calls and Surveyor polls.

This is the message that plays when someone calls the number displayed on their Caller ID. This message should include:

Required

- The name of the organization responsible for the call stated at the beginning of the message
- The contact telephone number for the organization

Optional

- Ability to opt-out of future calls

Example Script (with opt-out option):

“Hi, this is Congressman/Senator _____. I was calling to invite you to participate in a Telephone Town Hall event. The purpose of this call is to listen to my constituents and understand which topics/issues are most important to you. I will try calling you again in the future. If you have any questions, please contact my office at xxx-xxx-xxxx. If you would like to be added to the Do Not Call List, please enter your ten-digit number now.”