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. <u>Individual-</u> 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. <u>Blasts</u>- 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 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.

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

- **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.

Pending Text Messages	5 (4 Results) 🕒			
List Analyze Change 🛇	Sort: Date Created (Desc) 📎			
Remove Reply Assign Quick Reply				(ID# ACcb9
(240) 672-2012 Join		Type: Created: Status:	Text Message 11/28/2018 - 12:58pm Pending and Linked to a Contact	
Complete Thread:				
	Hi I would 11/8/2018 - 12		ribe to your enewsletter. Let me kr	now how!

- **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.

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Home	Contacts 🗸	Messages 🗸	Outreach 🗸	TourTrackr	Services N	 Casework 	🗙 Library 🗸	Eve			
Services »	<u>Results</u> » Servio	æ									
OPEN	Casework ·	- 2021 for 📕	Mrs. Suzy	<u>/ Broth</u>							
G	eneral	Messages (13)	Contacts (2	/2)	Log (25)						
			Detail			٥	<	Ac			
Status: Assigned	OPEN 🖌 Ashley July	an 🖌 Release				💋 Edit	Add a note				
Opened: Alert:	10/15/2018	10/15/2018 - 1:46pm by Ashley Julyan Updated: 4/26/2021 - 6:49pm									
Codes:	SSA - Social	Security Administr	ation				Q. Search Activity				
Descripti	on: Need help v	vith benefits					Ashley Julyan				
Primary (Mrs	Contact <u>Suzy Broth</u> (A	lo Role) 🖊 🔇 🔛		acts + Hodgepile (<i>No R</i> gressional Relations	iole) 🖉 🔀 🖂	: 🔾	Incoming Email from Hello this is a sample t 4/26/2021 - 6:47 PM 4/26/2021 - 6:46pm				
			Social Security	Administration			Ashley Julyan				
Approved) 7037597936 (H)	s <u>. Suzy Broth</u> relat	ed to <u>Casework -</u>	2021 for Mrs. Su	<u>ızy Broth</u>			ef II			
General	Log (1)		Message				🗸 Detail	Other Act			
Outgoing:	Email		message	. 5	itatus: Appro	ved 💌					
rom:				٩		Send	Save as Template Date In: 4/26/2021				
ю:	No Outgoing Email			Less			Incoming: Email Created By: Ashley Julyan				
)c:	Facebook Message Fax	2		0			Assigned To: Ashley Julyan				
Boc:	Text (SMS/MMS)			0			Priority: None Salutation: Suzy				
Subject:											

2. Once your message is drafted and ready-to-go, hit the 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						■ ID# 518350
Approved Me	ssage for <u>Mrs. Ann Rog</u>	<u>an</u>					Actions 📀
C 703-555-1212 (H) (7 Senior Citizen Telephone Townhall Part							
General	Log (4)						
		Message				< Detail	Other Activity
Outgoing:	Text (SMS/MMS)		v	Status:	Approved *	Save as Template	Zedit
Issues:	Select issues	e	+		Send 😋 Message	Date In: 4/26/2021	
Message to (703) 559- 11/18/2020 - 8.40pm	-0064		•			Incoming: Text (SMS/MMS) Created By: Ashley Julyan Assigned To: Ashley Julyan Priority: None	Categorize
		lskdj sdkifj asl;kdfj asdikf sdfl;jksd ikjf sdl;kfji 2/18/2021 - 2:45cm				Message Comments:	
		2/10/2021 + 2/40pm				Add comments	

+Message

2. From the open service record use the

in-row action.

Home Contacts 🗸 Me	essages 🗸 🛛 Outreach 🗸 🍸 TourTrackr Services 🖍 Casework 🗸 Library 🗸 Events 🗸 LegiStats 🖍 Admin 🗸	
Messages » Results » Message »		ID# 7002423
Senior Citizen	n Rogan Telephone Townhall Participant Telephone Townhall Par	Actions 📎
General Messages (11	4) Outreach (28) Services (10) Events (5) Voter Data Log (54)	
Filters	All Services (10 Results) 🚱	
Q Filter Text	Itist Analyze Map Change Scherott Hore Scott: Opened (Desc)	\odot
Assigned To		(ID# 801235) 1
Service Type	Operation 10 State 1 State	OPEN 9/14/2020 Age: 224
Step	Mrs. Ann Rogan Updated: 9/3/4/2020 Mrs. Ann Rogan Codes: TOUR REQST - Tour Requests	Priority: 9
Service Priority	7990 Quantum Drive Vienna, VA 2182-555	
Service Code	H: 703-555-1212 chartdsi@gmail.com	
 Due Month 	Telephone Townhall Participant, Senior Citizen Description: The Rogan Family would like a tour of the Supreme Court to meet Associate Justice Ruth Bader sinsburg.	
Due Date		(10.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.
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Updated Month	Updated: 3/29/2021 Attach an Existing Message to the Service	4/10/2019 Age: 747 Priority: 9
Updated Date	7990 Quantum Drive Alert: 4/12/2019	Priority, 5
Opened By	Vienna, VA 22182-5255 Codes: SSA - Social Security Administration, CASEWORK - Casework H: 702-555-1212 Issue	
Opened Month	chardbil@gmail.com Telephore Townhall Participant, Senior Citizen	
Opened Date	tempinone roversneer die sogering usering sokeen	



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	Contacts 🗸 🛛 Me	ssages 🗸 🛛 Ou	treach 🗸	TourTrackr	Services 🗸	Casework 🗸	Library 🗸	Events 🗸	LegiStats 🗸	Admin 🗸		
Shortcuts »		n Rogan 🖌	Participant							E	ngagement	ID# 7002423
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 Filter Filter Assign 	Text 🔊	all Serv			7990 QUAN CHARTLDS Letter: Custr Batch: Issue Codes	Ashley Julyan	82 - 5255	×				(ID# 801235) 1
ServiceStep	2 Type 2 Priority 2 Code	Mrs. An 7990 Qu Vienna, 1 H: 703-55 chartIdai Telephon	5 - Tour R n Rogan antum Drive /A 22182-5255 55-1212 @gmail.com a Townhall Parti tion: The Rog	cipant, Senior Ci	Langdy							(UD# 00123) 1 OPEN 9/14/2020 Age: 224 Priority: 9

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.

Mrs. Ann R Senior Citizen, Tele Birthdate: 4/5/1954	phone Townhall Participant				Engagement 44 Med	Actions
General Messages (114)	Outreach (28) Service:	(10) Events (5)	Voter Data	Log (54)		
Home Address + * 7990 Quantum Drive / Vienna, VA 22182-5255 VA11 Fairfax County Mag 9	Business A None	ddress +	E (2) (2)	line Info + jon.quorum * / ann_rogan * / chartidsi@gmail.com * / mrsannrogan * /	Phone Numbers + H: (703) 555-1212 * M: (703) 559-0064 *	
Household Members + <u>Mrs. Ann Rogan</u> constructions Townhall Participant Mr. Robert Rogan	Organizatio	ion Contacts Attachments			Affiliations SENIOR - Senior Citizen, TTH - Telephone Common Senior Citizen, EDUCATION -	
		Can I please subscribe to y 3/3/2021 - 10.37am	our seniors newsletter Today, our entire na	Please go to our websilit: du2021 - 305m bion can come fogether and units behind those who se As your Representative, I support you, and war veteran resources on my Quorum house gov page. 4220221 - 307m	ducation Supporter, EMAIL.OPTIN - Email Optin to Newsletter Subscription, VETERAN Veteran	

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 <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.