

How to Use the SMS Correspondence Tool

The SMS Correspondence tool enables users to send SMS messages to the contacts in their account. Messages can be sent to single individuals or to groups of contacts.

How to Enable the SMS tool

In order for a user to be able to send SMS messages from Views, the tool first needs to be enabled for their User Group:

- Hover over **My Account** and select **Administration**
- Select **User Access** from the Access & Security sections on the left-hand side
- Select **User Groups** from the sub-menu on the left-hand side
- Click on the **Configure** icon next to the relevant User Group 
- Select **ON** next to SMS and click **Save**

How to Send a Message to a Single Contact

- Hover over **Contacts** and select the relevant Contact database (e.g. **'Participants'**)

- Search for the person you wish to message and click on their name
- Select the smartphone icon in the top-right of the screen* 
- Compose the message and click **Next**
- Review the message and click **Send**
- The number of credits required will be displayed in the pop-up window. Click **Send** again to confirm

How to Send a Message to a Group of Contacts

- Hover over **Contacts** and select the relevant Contact database (e.g. '**Participants**')
- Select the smartphone icon in the top-right of the screen 
- Compose the message and click **Next**
- Select the Contacts that you wish to send to and then click **Send**
- The number of credits required will be displayed in the pop-up window. Click **Send** again to confirm

* Please note, this will only display if the Contact has a valid entry in the **Mobile** field

How to View all SMS Correspondence with a Contact

- Hover over **Contacts** and select the relevant Contact database (e.g. '**Participants**')
- Click on the name of the relevant person
- Select **Correspondence** from the Tools section on the left-hand side
- Click on the **SMS** tab

A list of all SMS messages sent to this person will be displayed. Select the eye icon to view an individual message



How to View all SMS Correspondence in the Account

- Hover over **My Account** and select **Administration**
- Select **Correspondence** from the Tools section on the left-hand side
- Click on the **Sent History** tab

A list of all SMS messages sent from the account will be displayed. Click on the **Actions** menu and select **Export CSV** to download the Correspondence history.

How to View the SMS Credit Balance

- Hover over **My Account** and select **Administration**
- Select **Correspondence** from the Tools section on the left-hand side
- Click on the **SMS** tab

The number of credits remaining will be displayed at the top of the table, along with the number of credits used in previous periods.

How to Configure Alerts for SMS Credits

You may wish to be notified if your SMS Credit Balance falls below a certain threshold. To create a new Alert:

- Hover over **My Account** and select **Alerts**
- Click on the plus  icon



- Enter a **Name** and **Description** for the Alert
- Under **Notification Method**, choose whether to receive an in-system notification and/or an email notification whenever the Alert is triggered
- Under **Frequency**, choose **SMS**
- Under **Method**, choose **Coded Alert**
- Click **Add**
- In the **Coded Alerts** menu, choose whether to receive an alert if the Credit Balance falls under 10, 50, or 200 credits
- Click **Save**

The alert will be triggered whenever the balance falls under the selected threshold. This process can be repeated to create Alerts for additional credit thresholds.