Engage SMS

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Phone Management Page

Once TE completes the setup for your organization, an administrator can use the Phone Management page to:

- Provision a Twilio account for the organization
- Provision a phone number for each user who should be sending and receiving SMS messages through TE
- Deprovision a phone number for a user who is no longer with the organization
- View basic SMS usage statistics

Provisioning a Number

An administrator must perform a 1-time action to provision a phone number for each user who wants to use Engage SMS (2-way messaging). Once the number is created for a user, this action does not need to be repeated for that user.

1. Navigate to **Organization Admin → Communication Settings**.
2. On the Phone Management page, locate the users in the list you want to provision numbers for.

> **Tip**
> You can enter text in the Search field to help locate a name. Users without a provisioned number display a blank space in the Provisioned Phone Number column.

3. Select the checkboxes on the left side for these users.
4. Click the **Provision phone number** button.
5. In the Provision number box, select either:
   a. **Match user's cell phone area code** – The provisioned number for each user will be chosen to match the area code of the cell phone number stored in those users' account settings.

Use a company defined area code – The provisioned number for each user will be chosen to match the area code you enter in the field below.

> **Note**
> The box displays the text "Generate phone number for X user(s)" (where X is the number of users originally selected) to remind you of the action you are about to take.

6. Click the **Generate Number(s)** button.

7. A success message appears with confirmation of the users who have had numbers provisioned. Click the **Done** button to close this box.

On the Phone Management page, the new number for each user is displayed in the Provisioned Phone Number column. This column remains blank for users without a provisioned number.

Deprovisioning a Number

An administrator can remove a phone number from a user. This uncouples the phone number from the user in our platform and releases it in Twilio (where it is eventually returned to the publicly available pool to get reassigned), so TE and your organization are not charged monthly for the usage.

1. Navigate to **Organization Admin → Communication Settings**.
2. On the Phone Management page, locate the users in the list you want to deprovision numbers for.
3. Select the checkboxes on the left side for these users.
4. Click the **Deprovision phone number** button.
5. In the confirmation box:
    a. Check the box to indicate that you understand that the action is irreversible.
    b. Click the **Deprovision Numbers #** button to confirm the action. (The # indicates how many numbers you originally selected.)
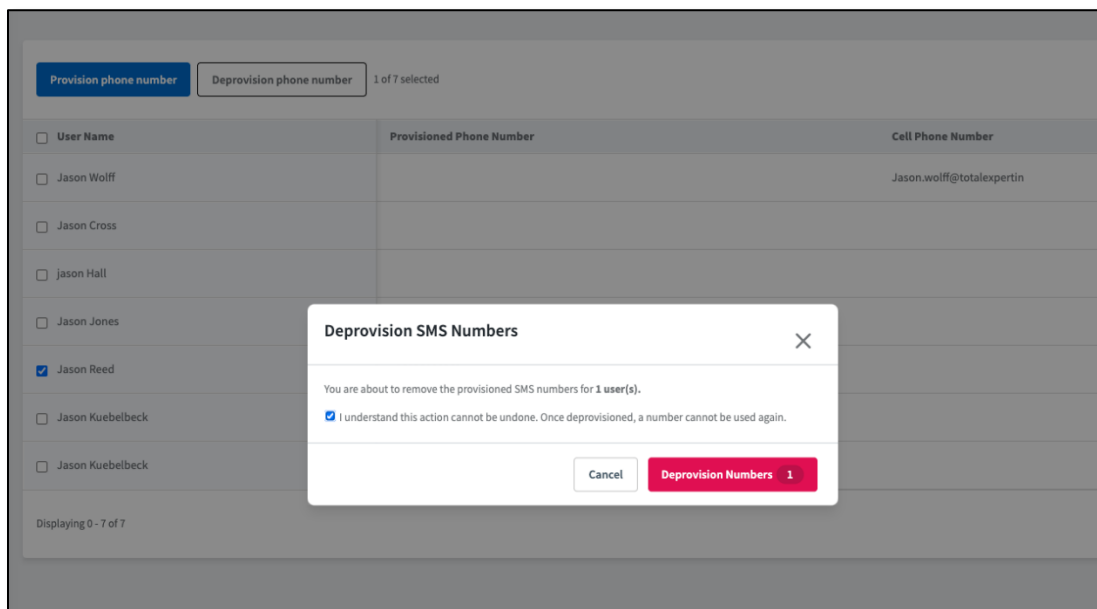
Viewing Organization SMS Usage

A system administrator can view the current month and past 12 months of Engage SMS segment usage for the organization via the Phone Management page.

Using the Message Widget

Sending an Opt-In Request

Before you can send a message to a contact, they must opt in to receiving messages. To comply with this requirement, TE allows you to send an opt-in request to a contact from their contact details page.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the contact you want to send an opt-in request to.

Note

The contact record must include a valid cell phone number.

3. The following options on the contact details page are equivalent (you only need to do 1 of these things).

Note

Depending on your configuration, you may not see all of these options.

    a. In the page header, click the **Message** button. The Send an SMS box opens. The message widget in the lower-right corner of the page expands. Because the contact has not opted in yet, the option to send a message is disabled, and an option to send an opt-in request is displayed; click the **Send opt-in request** button to send the request.
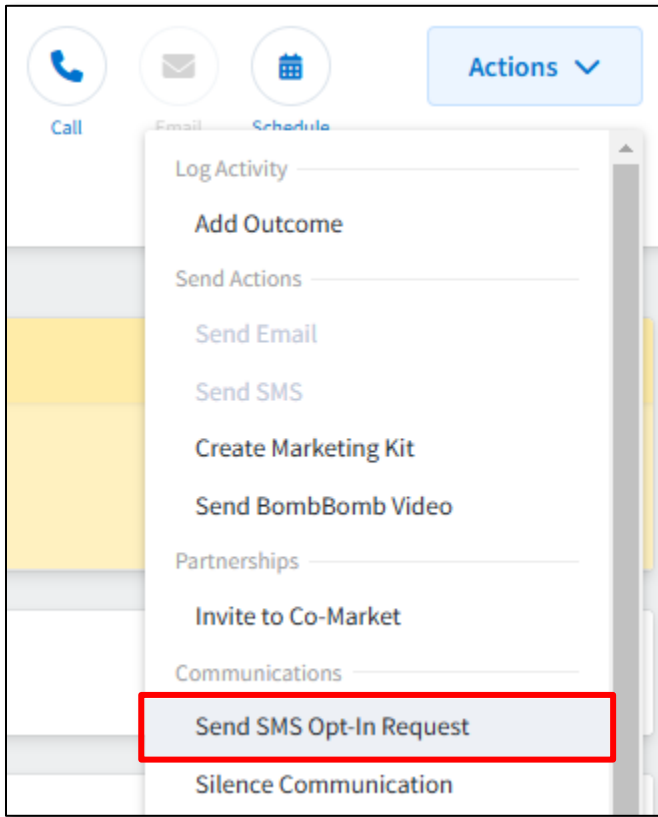
b. Scroll to the Communication Preferences section. Under the SMS heading, a message appears notifying you that the contact has not opted in yet. This message also includes a link; click this link to send the request.
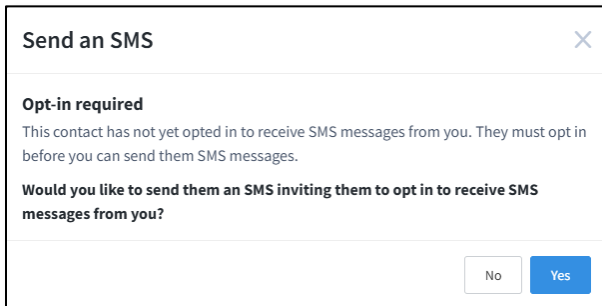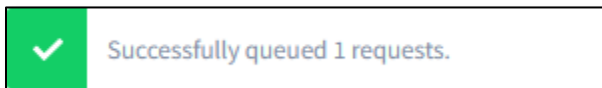

c. Select **Actions → Send SMS Opt-In Request**.

4. In the case of either option 3.b or 3.c above, a confirmation box appears with information about sending the opt-in request. Click the **Yes** button in this box to send the request.

A success message appears at the top of the page.

Note
A given user can send up to 3 opt-in requests to the same contact. These requests must be at least 12 hours apart.

If you have already sent 3 opt-in requests, or if it has been less than 12 hours since you sent the last request, the options above are all hidden or disabled.

Messaging in the Widget

If the contact opts in to receiving SMS messages, the options above are all hidden or disabled, and you can now message the contact directly:

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the contact you want to message.

3. On the contact details screen, a messaging widget appears in the lower-right corner with the contact's name in its header. If the widget is collapsed, click the **[⌃]** button in its header to expand it.

4. The widget resembles a texting phone app. Type a message and click the **Send** button.

Replies from the contact appear in the widget without needing to refresh the page. Depending on your configuration, notifications for each message may be sent by email (with a direct link to the contact record) and/or via the TE site.
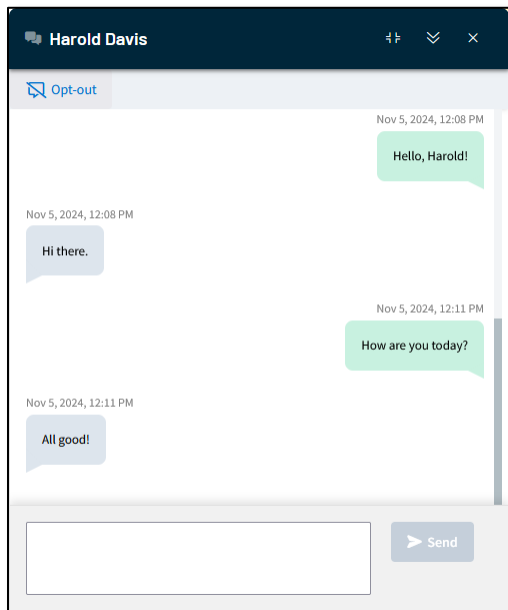
Journeys Behavior

Journeys can send SMS messages to contacts on behalf of the user who owns the contact records. These messages are sent from the phone number provisioned for the user who is configured to send the message. Contacts must be opted in to receive the messages, but journeys will initiate an opt-in request if the contact is not already opted in.
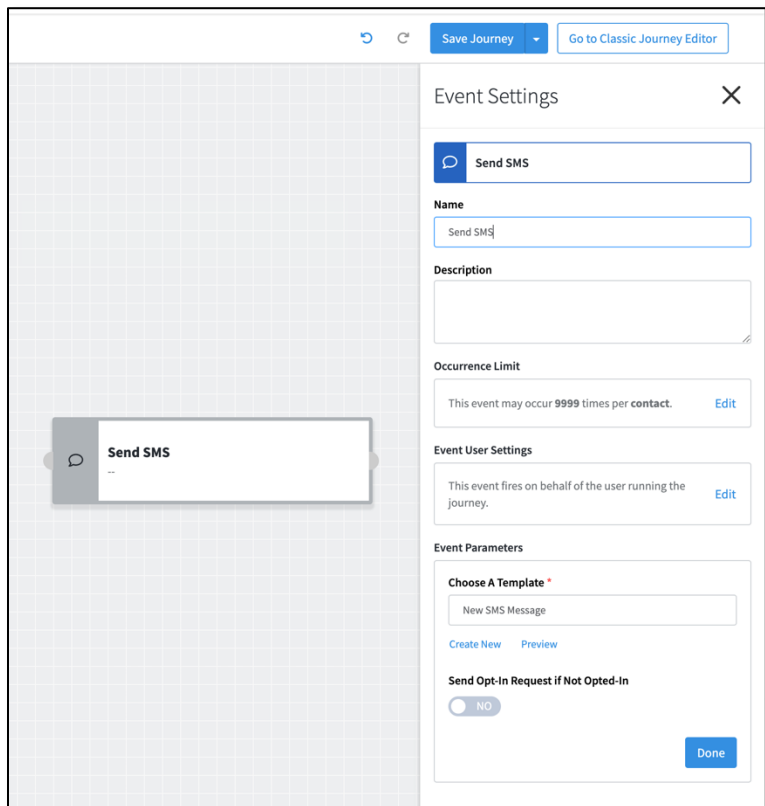
Journey messages are shown in the conversation widget and on the mobile app the same way 1-to-1 conversations display in the platform.

Sending Windows

Journeys hold *both* triggered messages *and* opt-in requests so they are not delivered during non-compliant sending windows. An organization can configure its preferred window via the following org settings:

- `sms.send_window.start_time`
- `sms.send_window.end_time`

Messages that are triggered to be sent outside of these windows will be queued up to be sent at the start time of the next sending window. Bulk messages sent from the contact list are handled the same way.

The default sending window in our platform is set to 8am–4pm Central Time. For a nationwide coverage client to be TCPA compliant with national and state regulations we would recommend setting this to 10am–7pm Central Time to ensure that messages are not sent between 8pm and 8am in the receipient's local time zone.