SMS Chat Window

> ⓘ **This feature requires a CommCare Software Plan**
>
> This feature (SMS Chat Window) is only available to CommCare users with a **Pro Plan** or higher. For more details, see the [CommCare Software Plan page](#).

Overview

The Chat Window feature allows you to interact with either cases or mobile workers using a chat window interface. The chat window is available to all projects that have two-way messaging enabled.

Common uses could include allowing staff to easily interact or follow up with mobile workers or cases, or a help center that provides support to users.

The chat windows can be accessed by navigating to the **Contacts** section of **Messaging**. From that page you can search a list of cases and workers and open up a chat window.

Contact Name		Contact Type	Phone Number
marie	Chat ➔	Mobile Worker	17033996500

Search by name or phone number   [Search] [Clear]

Show [10] contacts per page

Showing 1 to 1 of 1 contacts   ‹ Previous **1** Next ›

Note: only mobile workers with verified phone numbers and cases that have a phone number specified ([Registering a Case Contact](#)) will appear in the list.

Chat - marie

🔒 Secure | https://www.commcarehq.org/a/sms-test/... 🔍

Message History · **Yesterday** · 1 Week · 30 Days · All Time	
System: Welcome to CommCareHQ! Is this phone used by marie? If yes, reply '123' to start using SMS with CommCareHQ.	05:23pm 08/07/17
marie: 123	05:24pm 08/07/17
System: Thank you. This phone has been verified for using SMS with CommCareHQ	05:24pm 08/07/17
Amy: Did you complete your supervisions today?	06:10pm 08/07/17
marie: I visited two patients, and scheduled clinic visits	06:11pm 08/07/17
System: Heads up! Your weekly meeting is at the community center tomorrow at 6 pm.	02:00am 08/08/17

| 0 / 160 | Send |

Features of the chat window:

- Displays a messaging history, including both incoming and outgoing messages
- Has a character counter to ensure that messages are not too long
- Forces the window to blink when new messages come in, if it is not the active window
- Multiple chat windows can be open at the same time
- Multiple web users can interact with the same mobile worker via the chat window

Settings

You can configure some aspects of how the Chat Window works under the Messaging tab under **General Settings**:

MESSAGES

Compose SMS Message

Broadcast Messages

DATA COLLECTION AND REMINDERS

Reminders

Reminder Calendar

Keywords

CONTACTS

Chat

Case Groups

SETTINGS

SMS Connectivity

General Settings

Languages

Below are some details about how each setting works:

Chat Settings

Case Name Display ❓   Default ▲▼

Message Counter ❓   Don't use counter ▲▼

Delay Automated SMS ❓   Disabled ▲▼

Survey Traffic ❓   Show all survey traffic ▲▼

A Message is Read... ❓   only for the user that reads it ▲▼

Chat Template ❓   Default ▲▼

Case Name Display - determines whether the case property "name" is displayed in the chat window title (default), or another case property.

Message Counter - if enabled, exposes a counter in the message window which will increment as long as the window is open. The number will turn red when it reaches the threshold specified in the settings. The counter is useful if you are working on a project that has lots of chat interaction and you want to allow web users to track and be able to limit how much they are messaging during a given session. The counter will reset when the window is closed.

	0
	Reset

Message History · **Yesterday** · 1 Week · 30 Days · All Time

System: Welcome to CommCareHQ! Is this phone used by marie? If yes, reply '123' to start using SMS with CommCareHQ.	05:23pm 08/07/17
marie: 123	05:24pm 08/07/17
System: Thank you. This phone has been verified for using SMS with CommCareHQ	05:24pm 08/07/17
Amy: Did you complete your supervisions today?	06:10pm 08/07/17
marie: I visited two patients, and scheduled clinic visits	06:11pm 08/07/17
System: Heads up! Your weekly meeting is at the community center tomorrow at 6 pm.	02:00am 08/08/17

	0 / 160	Send

Delay Automated SMS - This delays sending automatic messages (i.e. reminders or surveys) to a contact for a set of chosen times an days. This ensures that chat messages don't conflict with automated surveys.

Survey Traffic - if set to hide survey traffic, this feature will prevent automated survey messages and responses from being seen by the user of the chat window. For example, if you have an automated survey which asks patients for feedback on the performance of the person using the chat window, you would not want that user to be able to see the responses. You can also choose to allow the chat window users to see invalid responses only, which can alert them to a possible issue or confusion with completing the survey.

A message is read... - when messages come into CommCareHQ while no one is actively monitoring the chat window, those messages will show up with blue dots, indicating that they are new/unread messages. You can choose to make the "unread" concept specific to one user or general to any user of the chat window.

Notes/Limitations

- Messages sent via the Chat Window will be available via the Messaging Log like all other messages
- Only mobile workers with verified phone numbers and cases that have a phone number specified (Registering a Case Contact) will appear in the list of contacts.