Getting Started with Messaging

Don't forget to visit the CommCare Messaging Home Page

Overview

CommCare allows you to schedule SMS messages, emails or IVR (voice calls) to cases and mobile workers registered in the system. Here are some example usage cases:

- Sending a reminder to a health worker when one of their beneficiaries is due for a delivery.
- Sending counselling messages to beneficiaries (for example, reminding them to take their iron pills).
- Sending a short survey to a beneficiary (for example, asking if they've attended a clinic)
- Have a patient request information from the system. For example, if they are enrolled in a smoking cessation study, they may request support messages from the system.

Messaging allows you to setup **keywords** (so users can send messages and data to the system on their own), **reminders** (scheduled conditional messages to a specific phone number) and **broadcasts** (mass messages or surveys to group of numbers).

The SMS Basics page covers basic information about how SMS works and is priced in CommCareHQ.

If you have questions, check out the Frequently Asked Questions page.

Setting Up Your Project for Messaging

Type of Messaging

When starting your project, you need to decide between **outgoing-only** and **two-way** messaging. Check out CommCare Messaging Vocabulary to learn more.

- **Outgoing Only**: Users can only receive messages and can't respond or send data to the system. (Available on the Standard Plan)
- **Two Way Messaging**: Users can also send data back to the system by responding to surveys or sending in keywords. (Available on the Pro Plan).

Choosing a Phone Number (SMS Connectivity)

To send and receive messages CommCare needs to use a phone number to send messages. This is also called a *gateway*. Depending on the country of your project, scale and type of messaging required, the following options are available:

- **Dimagi Owned Gateways** : These are high scale phone numbers or shortcodes that are only available in certain countries. Per-message fees are lower and some countries support toll-free incoming messages for users.
- **Telerivet Android Phone**: Send and receive messages using an Android phone by using the Telerivet app. This phone will connect to CommCareHQ and be used for messaging for the project. This option works well for smaller scale pilots.   Project will directly pay costs for the phone and messages to and from the phone.
- **New In Country Gateway:** For larger scale projects, we can help setup a new in-country phone number or short code. However, this typically takes a long time to setup and can come with higher monthly costs.

More details on SMS options are available here: Gateway Options for SMS Projects. Once you've chosen a gateway option, use the SMS Connectivity page for your project.

Messaging Tutorial

Use the Messaging Beginner Tutorial to create a basic SMS project and learn how messaging is configured in CommCareHQ.