Setting up an SMS Information Service

To create an SMS information service, you need to define a keyword that the user can text (ex. INFO) and a form (survey) that manages the interaction with the user. For this example, we're going to create a brief form that provides participants in a study with information about the medical trial and content. Users will send in the keyword INFO and will receive a set of options asking them what they need information on.
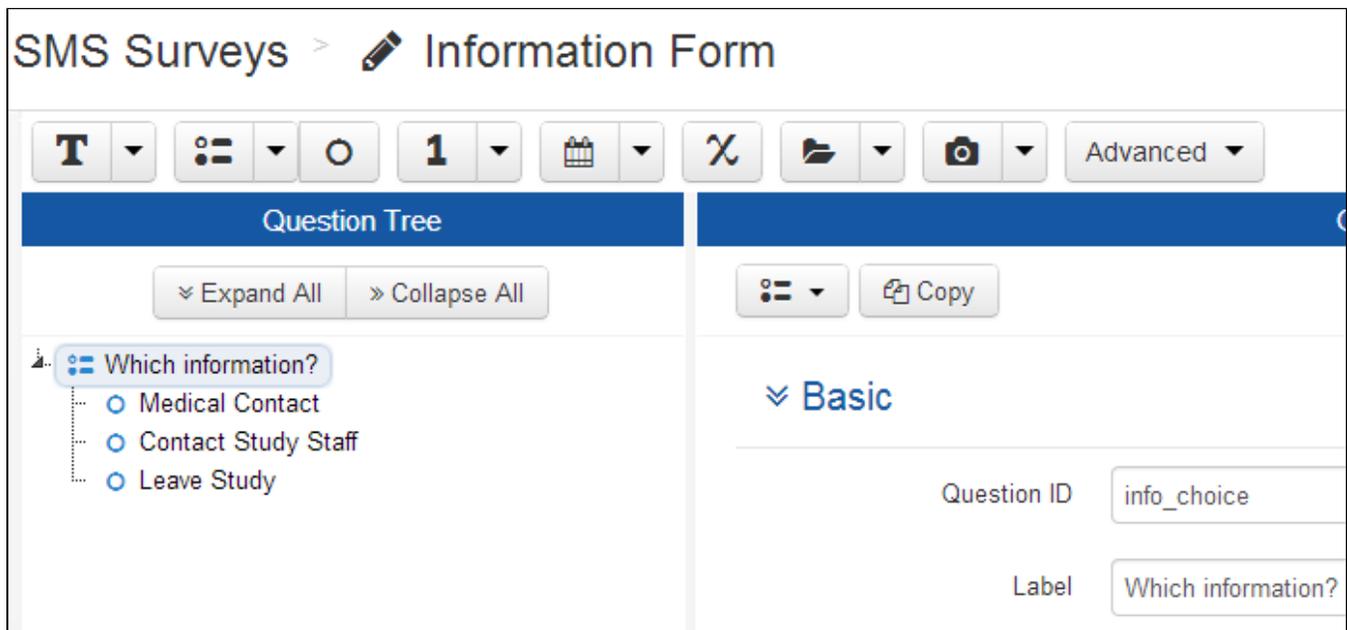
Form Creation

You need to define a form (or survey) that controls the interaction flow with the user. You can visualize each question or label in the form as an SMS sent and received from the phone. You can use logic in your form to drive how workflow.

Review the instructions here on creating a form for CommCare Messaging (Setup an SMS Survey). Some things to think through when building your form:

- SMS Surveys only support text, number, date or choice questions. You can't capture pictures, GPS locations, etc.
- Limit your messages to 160 characters or less. Some phones don't handle longer messages (and will have the content split into multiple messages).

Create a form and name it Information Form. Add a question titled "Which information?" with the options titled Medical Contact, Contact Study Staff and Leave Study.

Now we will add labels that provide the right information for each option. The text for the labels is "Please call Dr.Ravi at 19995551432", "Contact us at 18001321234" and "Text LEAVE if you want to stop study".

We also want to each label to only display based on the option chosen. We can do this using *Display Conditions*. Display conditions control whether a particular question is shown based on the answer to previous questions. Choose a label, go down to the Logic Section and hit the Edit button on Display Condition. You can then drag and drop questions from the left tree to setup the logic. An example is shown below:

Once you've setup the expression, Save and create similar logic conditions for each of the other labels. Once you're done, choose the green Save button in the corner of the form builder.

Keyword interaction

Once you've built your form, you want to set it up to run when the keyword INFO is sent in. This will start sending questions back to the person who sent in the keyword. Once they respond, the next question or label in the form will be sent back to them.

A keyword is managed or created from the Messaging section of the CommCare Messaging site and clicking "Keywords".

Create a simple keyword called INFO that will simply reply with the form you created to the user. There are some options on the keyword page that are a bit more advanced (will let you send a message to someone else when the keyword is sent in, or collect additional data in the same message as the keyword). These are not needed here. Once you've setup the keyword, hit the Save button at the bottom of the page.

User registration

Users will need to be registered before they can interact with the system. There are two types of users who can interact with the system - contacts who are registered (cases) or mobile workers. Mobile workers are project staff who can use the system via SMS (ex. registering participants). Cases are just contacts registered with the system (ex. study participants). Depending on your use case, you may need to use setup cases, mobile workers or both. Details on how to register users are provided below.

1. Bulk Registration of Contacts - This can be used to register a number of contacts using Excel.
2. SMS Self Registration - This allows contacts to register for the system on their own.
3. Registering a Case Contact - This allows project staff to register contacts using SMS, a phone or web data entry (CloudCare)
4. Configure a Mobile Worker for Messaging - Mobile workers need to be verified before they can send in messages to the system.