

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.

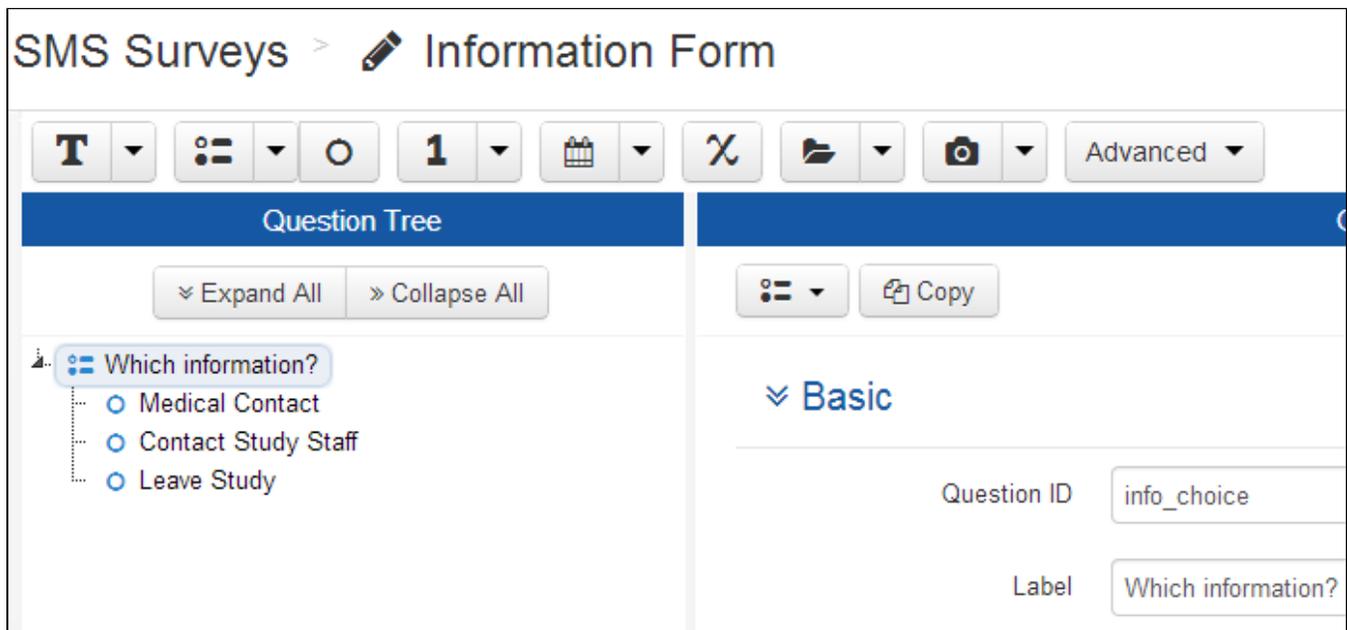
Form Creation

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.



The screenshot displays the 'SMS Surveys' interface for editing an 'Information Form'. At the top, there is a toolbar with various question type icons: text (T), choice (three dots), number (1), date (calendar), and others. Below the toolbar, the 'Question Tree' on the left shows a question titled 'Which information?' with three radio button options: 'Medical Contact', 'Contact Study Staff', and 'Leave Study'. On the right, the 'Basic' configuration panel is visible, showing the 'Question ID' set to 'info_choice' and the 'Label' set to 'Which information?'.

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".

SMS Surveys > Information Form

Question Tree	Question Properties
<div style="text-align: right;"> <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/> </div> <ul style="list-style-type: none"> Which information? <ul style="list-style-type: none"> <input type="radio"/> Medical Contact <input type="radio"/> Contact Study Staff <input type="radio"/> Leave Study <input checked="" type="radio"/> Please call Dr.Ravi at 19995551432 <input checked="" type="radio"/> Contact us at 18001321234 <input checked="" type="radio"/> Text LEAVE if you want to stop study 	<div style="text-align: right;"> <input type="button" value="Copy"/> </div> <p>Question ID: <input type="text" value="leave_study_label"/></p> <p>Label: <input type="text" value="Text LEAVE if you want to stop study"/></p>

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:

Expression Editor

Edit Expression

Result is:

Expression: is equal to

[Guide to Common Logic and Calculations](#)

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".

CommConnect BETA Reports Data Users Surveys Messaging Exchange Admin

Reminders > Keywords

MESSAGES
Compose SMS Message
Broadcast Messages
Message Log
SMS Connectivity

DATA COLLECTION AND REMINDERS
Reminders
Reminder Calendar
Keywords
Reminders in Error

Search:

Keyword	Description		
HELPME	(none)	Edit	Delete
NEW	(none)	Edit	Delete
UPDATE	(none)	Edit	Delete

Showing 1 to 3 of 3 entries

← Previous 1 Next →

+ Add Keyword

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.

Keyword

Description

Respond to Sender:

Send

Survey

Process incoming keyword as a Structured Message

Notify another person

Advanced Options

Override open SMS surveys

Restrict keyword initiation

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.