

# Setup SMS Keywords

## Overview

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Messaging can also be set up to allow users (mobile workers or cases) to initiate interact with the system themselves. This functionality can be setup through *SMS Keywords*.

A mobile worker or case can message the keyword to an HQ phone number. This will trigger a form to be run for the user.

For example, a mobile worker may want to register a new beneficiary or a beneficiary may need to request a service or report some information.

Some caveats:

1. Only known phone numbers can use keywords. To allow users to register themselves in the system, see [SMS Self Registration](#).
2. If a Mobile worker sends in a keyword to initiate a form that normally requires the user to first select a case from the case list, then they will also need to provide the external ID for that case.  
For example, if you have keyword "edit" tied to a form that updates a case, the mobile worker will need to send in "edit <external\_id>", where <external\_id> is the external\_id case property of the case they wish to open the form for. This is true for both normal keywords and structured SMS.

## Start Keyword Setup

To setup the keyword, choose the Messaging tab, then In the left side bar, select "Keywords". Click the "+Add Keyword" button.

| Keyword                               | Description | Action |
|---------------------------------------|-------------|--------|
| You have no keywords. Please add one! |             |        |

## Keyword: SMS Response

When setting up a keyword, you need to specify the following:

### Basic Information:

- **Keyword:** This is the word that the user will message to initiate the interaction. Keywords need to be unique within a project.
- **Description:** A description for the keyword does.

### Basic Information

|                     |   |
|---------------------|---|
| <b>Keyword*</b>     | <input type="text" value="HELP"/>   |
| <b>Description*</b> | <input type="text" value="This keyword notifies mobile worker if case requests support"/> |

## Respond to Sender

- **Send:** This controls what is sent to the person sending the keyword (a simple message or an SMS survey)
- **Survey or Message:** The survey or message to send

## Response

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|                              |   |
|------------------------------|---|
| <b>Send to Sender*</b>       | SMS   |
| <b>Message</b>               | Thank you. You will no longer receive messages. |
| <b>Notify Another Person</b> | SMS   |

**Recipient Information**

|                  |                                 |
|------------------|---------------------------------|
| <b>Recipient</b> | The case's owner                |
| <b>Message</b>   | {case.name} has requested help. |

### Notify Another Person:

This will let you notify another contact when someone sends a message to the keyword.

- **Recipient:** The person to send the message to, a mobile worker group or the case's owner if the message was sent by a case.
- **Send:** This controls whether to send the person an SMS message or a survey.
- **Survey or Message:** The survey or message to send.

### Advanced Options

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|                                  |                          |
|----------------------------------|--------------------------|
| <b>Override open SMS Surveys</b> | <input type="checkbox"/> |
| <b>Allow Keyword Use By</b>      | Cases Only               |

### Advanced Options:

**Restrict Keyword Initiation:** Restrict the type of contact who can use this keyword. Use 'Case Only' if you want to escalate messages to the Case Owner.

Once you've specified the keyword and form, save the keyword.

### Keyword: SMS Survey

## Basic Information

|                     |  |
|---------------------|--|
| <b>Keyword*</b>     | <input type="text" value="SURVEY"/>            |
| <b>Description*</b> | <input type="text" value="Starts SMS Survey"/> |

## Response

|                              |  |
|------------------------------|--|
| <b>Send to Sender*</b>       | <input type="text" value="SMS Survey"/>                                |
| <b>Survey</b>                | <input type="text" value="SMS Survey &gt; Case List &gt; SMS Survey"/> |
| <b>Notify Another Person</b> | <input type="text" value="No Response"/>                               |

## Advanced Options

|                                  |  |
|----------------------------------|--|
| <b>Override open SMS Surveys</b> | <input checked="" type="checkbox"/>                        |
| <b>Allow Keyword Use By</b>      | <input type="text" value="Both Mobile Workers and Cases"/> |

Save Keyword

Cancel

### Advanced Options:

- Override open SMS Surveys: Sending in this word will override any existing surveys that the user is currently filling out and trigger this keyword.

### Notes:

- SMS Surveys can have conditional triggers, for example send a satisfaction survey after a clinic visit.
- By creating a keyword, you can simulate that condition, and test an SMS Survey in a reliable way.

## Keyword: Structured SMS with Custom Delimiter

If the you choose *Structured Keyword*, if you want to send in all of your SMS questions at once.

The users are able to send an SMS that looks like <keyword> <answer1> <answer2> <answer3> etc.

The defaults assumes that the user provides answers to each question, separated by spaces. This will work well for most situations.

## Basic Information

**Keyword\***

**Description\***

## Structured Message Options

**Survey**

**Delimiters** **Use**    
**Custom Delimiter**

**Named Answers** **Use**   
**Named Answers**

**Example Structured Message**

## Response

**Send to Sender\***

**Message**

**Notify Another Person**

### Custom Delimiter

To setup a custom separation character, check the custom delimiter option and choose the characters you want to use to separate each answer. This could be a ",", or "|" or even multiple characters like "||".

This example below uses a period (.) as a custom delimiter.

- *Custom Delimiter*. This is useful if you want to use something else to separate each answer. For example, if any of your answers have spaces, the default separator of a space will not make space.

## Keyword: Structured SMS with Named Answers

### Named Answers

Named Answers allow users to skip questions or answer questions in a different order. This works by allowing the user to provide an identifier for each answer.

To use named answers, check the named answer option.

Specify the Name that the user enters, and the question (via xpath in the form) that it maps to.

For example, you may want to map two properties

- /data/name to "name"
- /data/household\_size to "members"

By adding a joining character, the name and the value are paired together. The joining character in this example is a semi colon : .

## Structured Message Options

**Survey**

**Delimiters** Use  Custom Delimiter

**Named Answers** Use  Named Answers

| Name                                 | XPath   | Action                                  |
|--------------------------------------|---|---|
| <input type="text" value="NAME"/>    | <input type="text" value="/data/name"/>           | <input type="button" value="✕ Remove"/> |
| <input type="text" value="MEMBERS"/> | <input type="text" value="/data/household_size"/> | <input type="button" value="✕ Remove"/> |

**Joining Characters** Use  Joining Character

**Example Structured Message**

As you build your Named Answers set-up, look at the Example Structured Message to understand how the message should look.

Both of these examples are valid options

- visit name:123 members:456
- visit members:456 name:123