

SMS Chat Window



This feature requires a **CommCare Software Plan**

This feature (SMS Chat Window) is only available to CommCare users with a **Advanced 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.

Show contacts per page

Contact Name	Contact Type	Phone Number
marie <input type="button" value="Chat"/>	Mobile Worker	17033996500

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/...](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.

The screenshot shows a chat window interface. At the top right, there is a counter displaying '0' and a 'Reset' button. Below this is a navigation bar with links for 'Message History', 'Yesterday', '1 Week', '30 Days', and 'All Time'. The main area contains a list of messages with timestamps. At the bottom, there is a text input field, a counter showing '0 / 160', and a 'Send' button.

Message	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

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.