How to Send SMS Text Messages

Add cell carrier to Cell Phone information

Beginning with Shelby v.5.10.1000 the Phones screen includes a Cell Carrier drop-down option that is active only for the Cell Phone phone type. In order to be able to send a text message directly to a person from the Shelby v.5 software, that person must have both a cell phone number and the corresponding cell carrier listed on the Phones screen.

If you are working in Check-In, add both the cell phone and Cell Carrier information to any Quick Print entries to enable texting from Check-In. (These options may not be visible to you until you enable them. See the section on Check-In later in this document for details on how to enable the cell phone information for Quick Print entries.)
Add new cell phone carriers using the Control Table Information utility

Even though the system has most of the popular cell carriers pre-loaded into the drop-down option, there may be some smaller providers that are not listed. You can add providers through the Control Table Information utility’s option for Cell Carrier. Before you start this process, be sure that you know the cell provider’s e-mail address for text messages. The provider’s web site should have that information. To add a new carrier, use the steps below.

1. Open the Home Base of GlobaFILE, Membership, or any module with the Control Table Information utility.
2. Click Utility > Control Table Information.
3. Click File > New.
4. Type in the description of the new cell provider and click OK.

5. Enter the domain portion of the e-mail address, including the leading @ sign, and click OK.

6. Choose File > Close to return to the Home Base.

The Control Table Information utility allows you to delete and to edit cell providers as well as add them.
Send a text message from Selections and Listings

Sending a text from Selections and Listings is quite similar to sending an e-mail. Follow the steps below to send a text from Selections and Listings.

2. Give the report a name that reflects the type of selected names and the purpose of the report, such as “Txt Msg to Parents.”
3. Set up the Criteria to select the desired names.
4. Under Reports, choose the Group E-mail – SMTP output.
5. Fill in the Send Mail Info. tab with the SMTP server information if it is not pre-loaded with the correct information.
6. On the E-mail Info./SMS Info. tab, place a checkmark next to Send SMS Message. This will inactivate all of the options on the tab except for the Subject and Body.
7. Enter a message into the Subject and Body portions of the tab. Note the following facts about the content of the message:
   a. In an SMS text message, whatever you type in as the Subject will be appended in front of the Body. For the recipients who get the message as an e-mail, the Subject and Body will be in the usual places.
   b. If the message is longer than 160 characters, SMS text recipients will receive multiple text messages. Remember to count both the Subject and the Body.
   c. The Merge Fields button allows you to add personalized elements to the Subject or Body, just as you can do with an e-mail message.
8. When you have finished typing in the message, click OK.
9. Save, close, and run the report as usual.

10. You will receive a message similar to the one shown below. The number at the start of the message is the number of selected names. However, this is not necessarily the actual number of text messages. Those without a cell phone and cell phone provider will not receive a text. This message is primarily a way for you to double-check that the number of selected names matches your expectations for the results, and it is a last opportunity to cancel the message.

![Message showing 191 people will receive a text message for the subject FCC Parents. Do you want to continue?](image)

11. When you click Yes, Shelby v.5 will send the message out to the selected names. You will receive a report after the message has been sent showing the e-mail addresses used for the text and e-mail messages. (The phone number in the illustration has been obscured for privacy reasons. They are not obscured on the actual report.)

![Print Preview showing report with e-mail addresses](image)

12. Finally, click to acknowledge that the messages have been sent.

![Notification showing Your SMS message(s) have been sent to the gateway.](image)
Sending a text message from a name list

The name list found in EZView, Membership Information, GlobaFILE Information, and elsewhere in Shelby v.5 includes a tool for generating a mail merge file or a bulk e-mail (or both) for a set of selected names. Beginning with Shelby v.5.10.1000, this tool now also includes the ability to send SMS text messages.

1. Select the names to receive the text message. There are many ways to select the names, and it does not matter which method you use.
2. After the desired names are selected, click the Mail Merge/E-mail button.

3. Check the box to Send SMS Message. You can select either to send an e-mail message or to send an SMS message, but not both.

4. Make sure the Send Mail Info. tab has complete and accurate information on it, just as you would to send an e-mail.
5. On the E-mail Info./SMS tab, enter a message into the Subject and Body portions of the tab. Note the following facts about the content of the message:
   a. In an SMS text message, whatever you type in as the Subject will be appended in front of the Body. For the recipients who get the message as an e-mail, the Subject and Body will be in the usual places.
   b. If the message is longer than 160 characters, SMS text recipients will receive multiple text messages. Remember to count both the Subject and the Body.
   c. The Merge Fields button allows you to add personalized elements to the Subject or Body, just as you can do with an e-mail message.
6. Click OK to send the message.
7. You may receive messages about overwriting existing files. Choose Yes to replace the prior selection of names with the current selection. Choose No to add the current selection of names to the prior selection and send the message to both.

8. You will receive a message similar to the one shown below. The number at the start of the message is the number of selected names that have a cell phone and provider. This message is primarily a way for you to double-check that the number of selected names matches your expectations for the results, and it is a last opportunity to cancel the message.

9. When you click on Yes, Shelby v.5 will send the message to the recipients. If you click No, Shelby v.5 will not send any text message.
Sending a Text Message from Check-In

The Individual Inquiry tool, available since Shelby v.5.10.1000, allows for texting to individual from inside of Check-In at any manual operation workstation. The texting option sends a text to the cell phone number associated with the individual you choose. If you want to text a parent on behalf of a child, you will need to choose the parent’s name from the Inquiry screen or you will need to put the parent’s cell number on the child’s phone information.

Preparing Check In to Send Text Messages

Before Check In can send text message, you must configure its SMTP setting. This is accomplished in the Preferences screen. On the Module/Organization Default Settings – Module Settings tab, click on the SMTP Settings button, as shown below.
Complete the **SMTP Setup** window that pops up. Use the **E-mail Address** box and **Test SMTP Connection** button to send a test e-mail and confirm that the settings are correct. Click **OK** when the information is complete.

**Capturing Cell Information for Visitors**

Member cell phone information needs to be updated as described earlier in the document on the Phones information under General Information. If you want to be able to send text messages to visitors as well, you need to be able to capture that on the Quick Print screen at any staffed workstation. To enable this information, check the box to **Include Cell Information on Quick Print Screen**, located to the left of the **SMTP Settings** button.
When this option is active, a **Texting Information** section is added to the Quick Print window for both individuals and families. When it is entered on the Family Entry screen, all members of the family are assigned the same cell phone information.
To send a text from inside Check-In, first open the Inquiry window and switch to the Individual tab. Use the filter options to reduce the number of names listed and click Refresh to populate the list. Or simply click Refresh with no filters to list every name.

Once you locate the name, click it to make sure it has focus, indicated by the dark outline around the name and the pointer triangle to the left of the name, as shown below. Then click the Send Text Message button at the bottom of the screen.
How to Send SMS Text Messages

An SMS Text Message window appears. Fill in the **Subject** and **Message** lines and click **Send**. If your message is longer than 160 characters, the system will send as many text messages as necessary to include it all.