

## Sending SMS Messages from *Priority*

*Priority* supports the communication of text messages (SMS) directly from the program to a cellular phone. The new module, which is purchased separately, allows you to route a normal e-mail to the server of an SMS supplier, where it is translated into an SMS message.

**Note:** Before you can set up the text message service, you must install your license for the **SMS Text** module in *Priority*.

### Setting Up the Text Message Service

1. After you have purchased the SMS package from a supplier, enter the **Text Messaging Definitions** form (under *Office Management* → *Mail*) and its sub-level form, **Content of Mail Message**, and define the message format for SMS messages sent from your e-mail account. These definitions will be used to convert and send outgoing e-mails that have been flagged in the SMS column.
2. Enter the personnel files of your employees and the contact records of your customers and vendors, and make sure that cellular phone numbers are recorded for them.

### Assigning E-mail Definitions

As the SMS utility uses your e-mail system, e-mail definitions must be made in each workstation from which SMS messages will be sent. Specifically, make sure that MS-Outlook is defined as the workstation's e-mail program (*Control Panel* → *Internet Options* → *Programs*) and that a mail account is opened in Outlook for the workstation. Alternatively, you can set up *Priority* to send external mail without Outlook (see the **User Interface Guide**).

### Sending Text Messages

To send a single text message, use the **Compose Mail** form. Record the cellular phone number in the **E-mail Address** column and flag the **SMS Message** column. The message will be sent using the SMS message format defined in the **Text Messaging Definitions** form.

To define automatic SMS messaging that is activated by certain system events, you can use the Business Rules Generator or the BPM Flow Charts (for detailed explanations of these tools and their uses, see the **User Interface Guide**). The method is the same in both cases: Open a rule (see **Figure 1**) and select the **Send SMS** event. You can determine whether the message is sent to a single user, a group (which can include users as well as customer and vendor contacts), or a given cellular phone number.

Alternatively, you can set up the rule so that the message recipient is determined by the value recorded in one of the form columns (e.g., **Customer No.**, **Contact**, **Assigned To**).

**Note:** If you send a text message to a customer or vendor, the system sends it to the cellular phone number of the contact whose e-mail address matches that of the customer or vendor.

The screenshot shows the 'Business Rules Generator' dialog box. It is configured to send an SMS message when an order is ready. The action is 'Send SMS' to the 'form column' 'Customer No.'. The message text is 'The Order <<Order>> is ready - come pick it up.'. The rule is active. The conditions are: 'the value of Order Status is equal to ready', 'the value is blank', and 'the value is blank'. The rule is valid for 'Myself'.

**Figure 1: Defining a Rule for Sending an Automatic Text Message**

### Checking that SMS Messages Were Sent

In each workstation, the first time that SMS messages are sent from **Priority**, check that they appear in the **Sent Items** folder.