

Adding SMS Templates

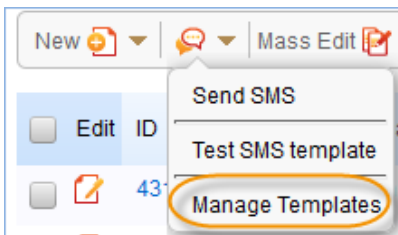
SMS templates enable you to set up automated SMS messages for a table with default messages and recipients, including elements such as variables and attachments.

Prerequisites

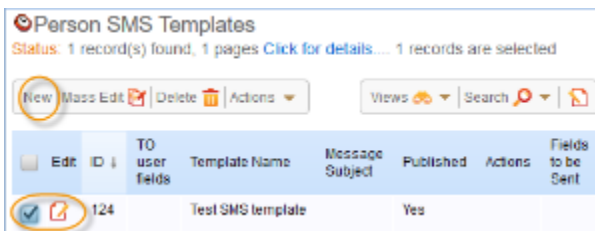
- Outbound SMS must be set up. See: [Configuring SMS Service](#).

Follow these steps

1. *Either...*
 - a. Navigate to **Setup > Email and SMS** and click Access SMS Templates.
 - b. Then select the relevant table and click Next.
2. *OR* in a table view click the SMS button and select Manage Templates.

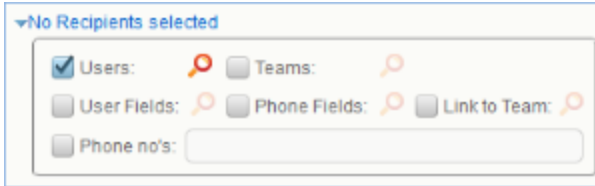


3. Either click New, or edit an existing SMS template.

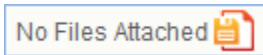


4. In the Edit SMS Template window, click Heading to enter template information:
 - a. In the Heading tab, enter a Template Name.
 - b. Enter a Description.
 - c. Select if the template is visible for users with the permission to view Published templates.
 - d. Select the teams for whom the template appears in the list of active templates for those with permission to view it.
 - e. Click Finish.

5. If you wish to add a variable, select **Insert > Variables**.
 - a. In the Formula wizard, add the [formula](#).
6. If you wish to use an existing template as a base, select **Insert > Populate from template** and select a template from the list.
7. Select an outbound SMS account in the From drop-down menu.
8. Select a message recipient by clicking the To recipient link.



- a. *Either* select a recipient type from the available list and click the search icon to open a list of all users.
 - b. Select the recipient(s) from the list and choose an option to import them.
 - c. *Or* enter phone number(s), separated by a comma.
9. Enter the message content.
10. Optionally, click the Attachment icon at the bottom of the screen to add an attachment



11. Click Finish.