


Create SMS Ticket Channel

Create a new SMS channel:

To create a new SMS channel,

1. Go to: **Settings > Channels > SMS.**
2. Click the  button on the top right.
3. Give the SMS Channel a recognisable name
4. Click the blue “Browse” button.
5. Select a number you like the look of. (If you don't care about how the numbers look or sounds, you can just select any number.
6. Click Save.

Warning

A warning message will be shown stating that creating a new SMS channel will add a charge to your invoice. If you're sure you want to create a new SMS channel, click “Confirm”. **Be aware the unlike other channels in Puzzel Case Management, SMS is a paid for service.**

To start using your SMS channel:

1. Create a new manual ticket from the green “+” button at the far top right, in the menu header.
2. Enter a Subject name.
3. Select a Team to assign this Ticket to.
4. Click the green “+ Start Conversation” button.
5. Select an SMS channel from the drop-down list of available channels. (you may need to scroll down.)
6. Enter the phone number you wish to send an SMS to, ensuring it uses the international format. E.g. ‘+447...’ for UK Numbers.
7. Type your message and send.

OR

1. Receiving an SMS message to the number shown on the SMS Channel settings page will automatically create a new Ticket.
2. Assign this Ticket so a User if it isn't already.
3. Click “Reply” to send an SMS message in response if required.

In order to make sure the next SMS message from an existing SMS contact creates a New Ticket, make sure to **Close** the existing ticket with that customer after Ticket is **Resolved**.

Note

Don't Forget to add New Ticket Rules for SMS channels if required.
Go to: **Settings > Productivity > New Ticket Rules > SMS**

