



BPA
Platform

Technical Overview

Send Text Message Tool

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Introduction

The **Send Text Message** tool is used to create and send data-driven, personalised text messages to employees, customers, prospects, suppliers, and so on. Sending can be automated to guarantee the timing of the text messages.

At the time of writing, only plain text can be sent; images and other multimedia are not supported.

Dynamic messages and recipients can be created using BPA Platform variables.

The **Send Text Message** tool makes use of the **Message Gateway Agent** service (see [About the Message Gateway Agent](#)), **ToucanText Message Gateway**, and the Microsoft Message Queuing (MSMQ) service to ensure all text messages are sent correctly. It is the MSMQ that provides resilience to the **Send Text Message** tool.

Features

- ▶ Merge message with data from other task steps
- ▶ Static or dynamic recipients
- ▶ Multiple recipients
- ▶ Memory feature to memorise task data created at runtime

Example Use-Cases

- ▶ Send text alerts when stock levels fall below a threshold
- ▶ Keep customers updated with their order statuses, delivery notifications, event and appointment reminders, and so on
- ▶ Conduct customer surveys over text
- ▶ Marketing campaigns with promotion codes
- ▶ Send text alerts when monitored technology fails

Technical Summary

Working with other Tools

The **Send Text Message** tool interacts directly with the following tools:

Consuming from Other Tools

Send Text Message can directly consume objects outputted by the following tools:

Icon	Tool Name	Tool Category
	Create Workflow Job	Format
	Format as Flat File	Format
	Format as Text	Format
	Run Crystal Report	Format
	Run Microsoft Word (Merge)	Format

Objects Consumed

The **Send Text Message** tool can use the following objects exposed by the above tools:

- ▶ **Documents (Text)** — Plain text documents

Exposing to Other Tools

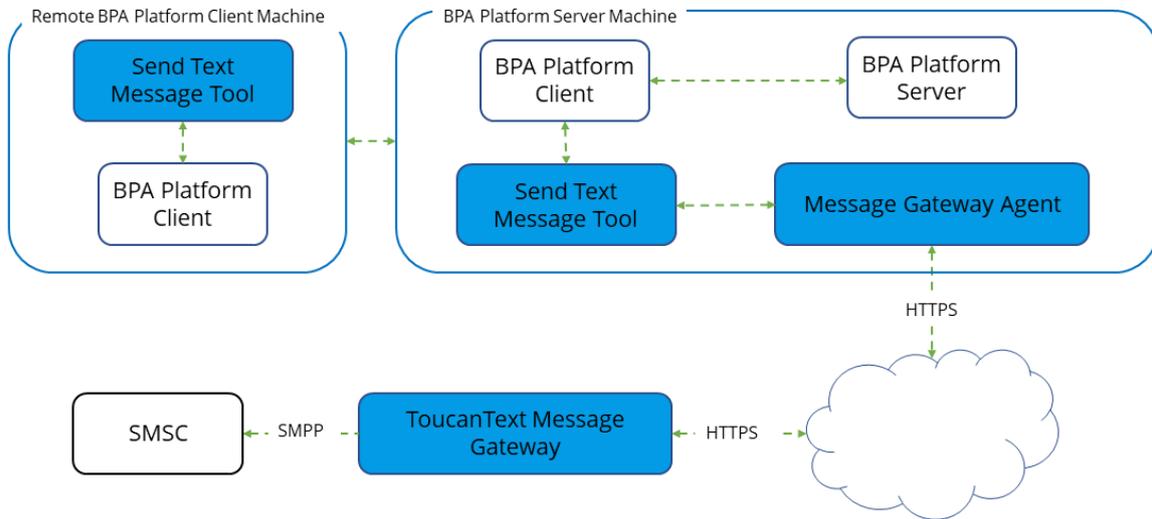
As an Output category tool, **Send Text Message** does not expose any objects that can be directly consumed by another tool. However, it does expose the following objects which can be used in a task step sequence:

- ▶ **DocumentSource** — If a **Document Source** has been selected (see [General tab](#)), this contains the data in the document as recordset columns
- ▶ **Step Properties** — Standard step properties are available allowing you to use statistical data of the tool

Architecture

The **Send Text Message** tool can be installed on any machine where the BPA Platform client is also installed. For remote installations, this is only for the purpose of running **Send Text Message** tasks.

The **Message Gateway Agent** must be installed on the BPA Platform server. This allows access to the [Queue Manager](#) in global configuration. At the time of writing, remote installations of the Agent are not supported.



About the Message Gateway Agent

The **Message Gateway Agent** communicates with the **ToucanText Message Gateway**. It runs as a service on the BPA Platform server, passing requests from the **Send Text Message** tool and the **Message Gateway**.

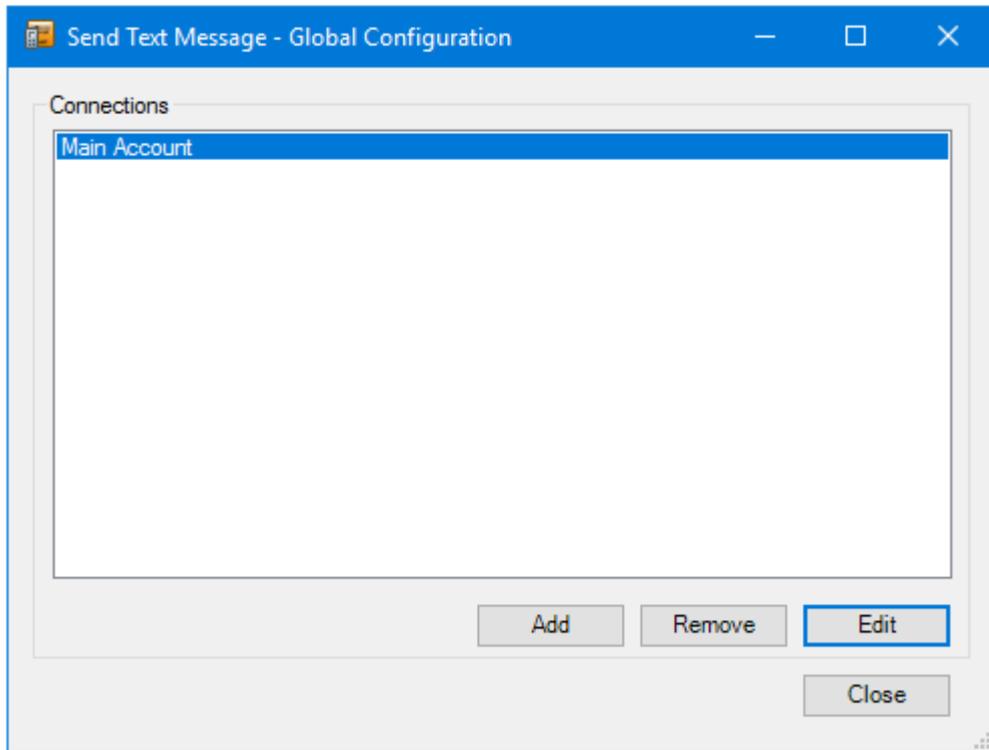
The **Message Gateway** makes use of the MSMQ service to queue text messages for sending. Failed messages are also processed through the **Message Gateway**, allowing them to be re-queued or deleted.

The **Message Gateway Agent** must be installed on the BPA Platform server. This allows access to the [Queue Manager](#) in global configuration. At the time of writing, remote installations of the Agent are not supported.

Global Configuration

The global configuration for the **Send Text Message** tool is used to create connections to the **ToucanText** accounts used to handle the sent text messages.

You access the **Send Text Message – Global Configuration** interface from the resources tree — expand **System > Tools > Output** and double-click **Send Text Message** in the items list.

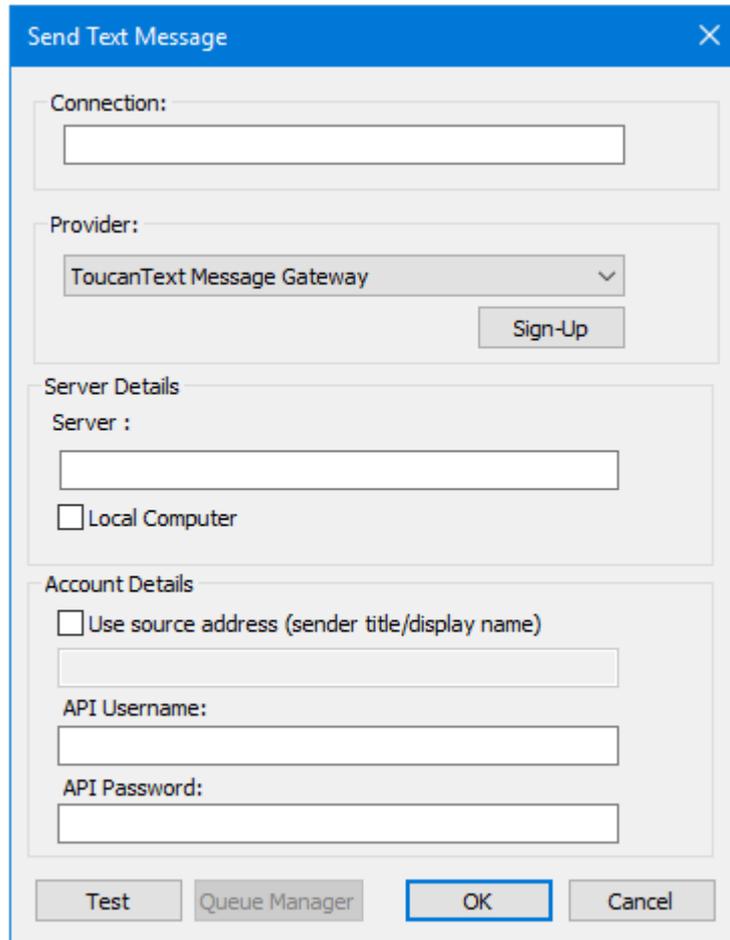


Click **Add** to create new connections.

Use **Remove** and **Edit** to managed your existing connections.

Connecting to the Text Message Provider

You must configure the connection to the text message provider before adding the **Send Text Message** tool to a task.



The screenshot shows a dialog box titled "Send Text Message" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Connection:** A text input field for a unique connection name.
- Provider:** A dropdown menu currently showing "ToucanText Message Gateway" and a "Sign-Up" button to its right.
- Server Details:** A section containing a "Server :" text input field and a checkbox labeled "Local Computer".
- Account Details:** A section containing a checkbox labeled "Use source address (sender title/display name)", an empty text input field, and two more text input fields labeled "API Username:" and "API Password:".

At the bottom of the dialog, there are four buttons: "Test", "Queue Manager", "OK" (highlighted with a blue border), and "Cancel".

Add a unique **Connection** name.

Choose the relevant text message **Provider** from the drop-down — note that the parameters differ slightly depending on the chosen provider. The example above is for the default and recommended provider of ToucanText.

Where Provider is ToucanText

If you do not have a **ToucanText** account, click **Sign-Up**. This redirects you to the **ToucanText** website where you can create the account and request prepaid message credit.

In **Server Details**, you either:

- ▶ Enter either the hostname or the IP address of the BPA Platform server hosting the **ToucanText Message Gateway**
- ▶ If the gateway is located on the same computer as this instance of BPA Platform, select **Local Computer**

By default, text messages are sent from "**ToucanText**". To change this, enable **Use source address (sender title/display name)**, and enter the new "sender" in the box below. This can be a valid mobile number or a string up to 32-characters long.

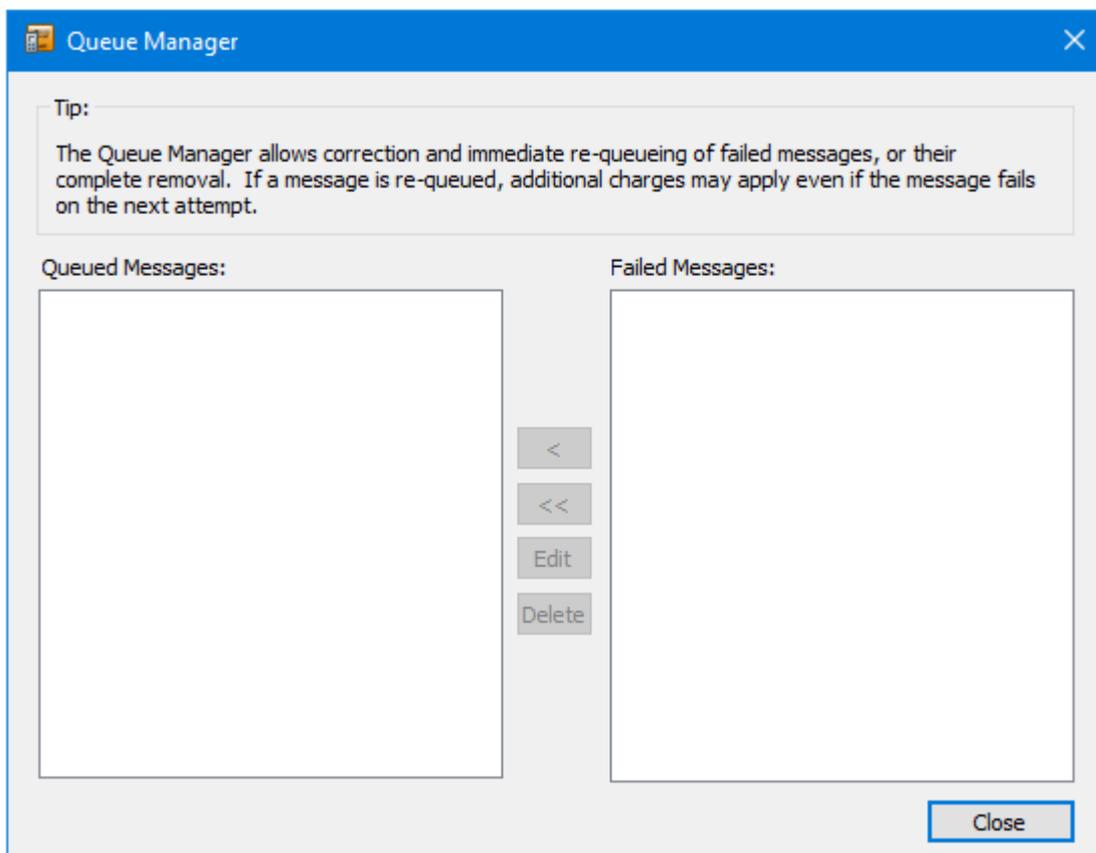
Enter the credentials (**API Username** and **API Password**) of the **ToucanText** account used to send text messages.

Use **Test** to ensure the message gateway can be connected to using the provided credentials. Note that a text message balance check is performed at the same time.

Queue Manager — Local Installations Only

NOTE: At the time of writing, the **Queue Manager** is unavailable for remote installations of the **Send Text Message** tool, that is, where the **Send Text Message** tool has been installed on a different machine to the **ToucanText Message Gateway**.

Use **Queue Manager** to view those text messages that have failed delivery.



Messages may fail delivery because the mobile number cannot be routed for delivery, running out of credit on the ToucanText server, or the incorrect credentials being entered in the global configuration for example.

From here, you can re-queue failed messages (suitable for when ToucanText credit has been "topped up"), or delete them from the queue completely.

Where messages have failed because incorrect credentials have been used, no further action is required in the **Queue Manager**. Once the username or password have been corrected, a confirmation message advising the messages will be resent is shown.

NOTE: Some error messages can result in the message queue being halted — refer to our knowledge base article, [What are the error codes for the Send Text Message tool?](#) If this happens, the **Message Gateway Agent** service must be restarted.

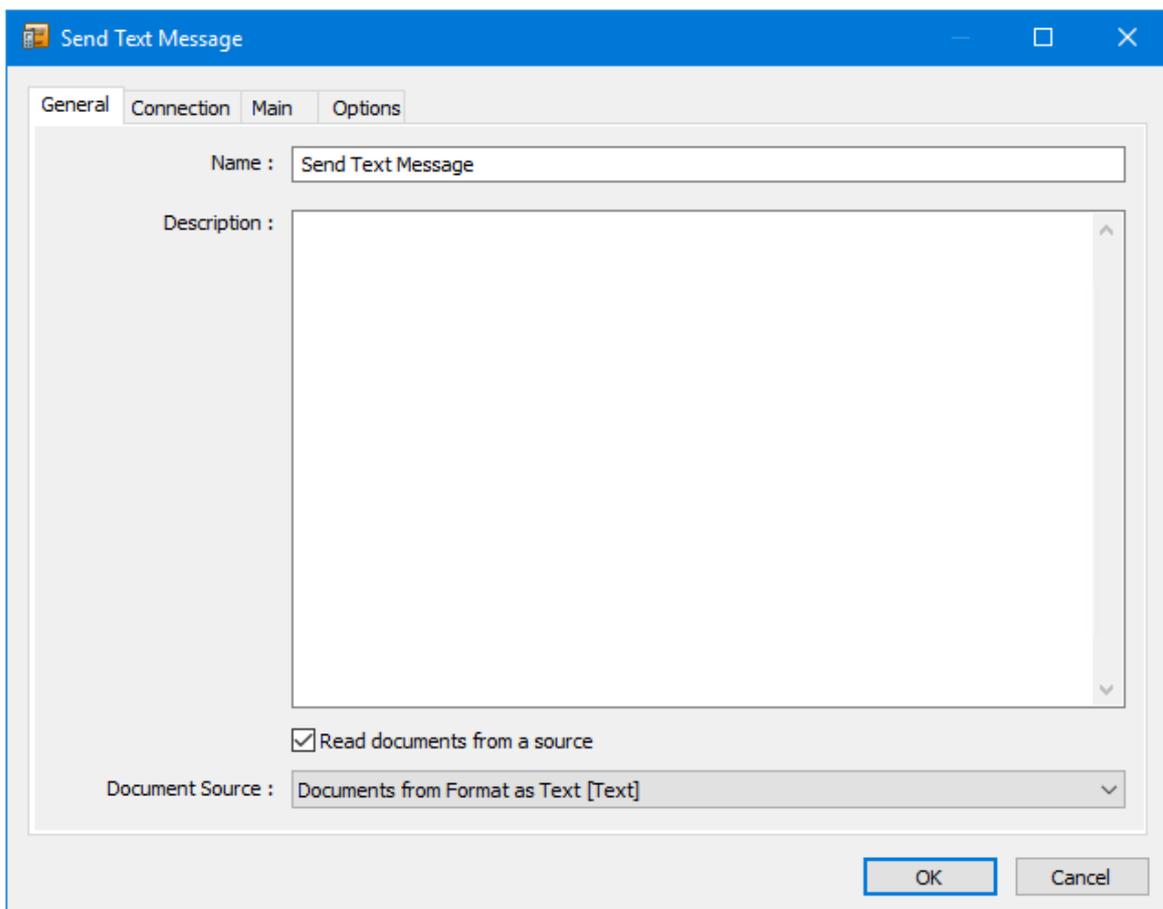
Step Configuration

To add a new **Send Text Message** step to an existing task, you either:

- ▶ Click and drag the **Send Text Message** icon from the **Task Browser** to the task **Design** area.
- ▶ From the task's **Design** tab, right-click on empty space and select **New > Output > Send Text Message**.

For a detailed description of how to create new tasks, refer to the product help.

About the General Tab



The screenshot shows a dialog box titled "Send Text Message" with a blue header bar. It has four tabs: "General", "Connection", "Main", and "Options". The "General" tab is selected. Inside the dialog, there is a "Name" field containing "Send Text Message" and a larger "Description" text area. Below these, there is a checked checkbox labeled "Read documents from a source" and a "Document Source" dropdown menu currently set to "Documents from Format as Text [Text]". At the bottom right, there are "OK" and "Cancel" buttons.

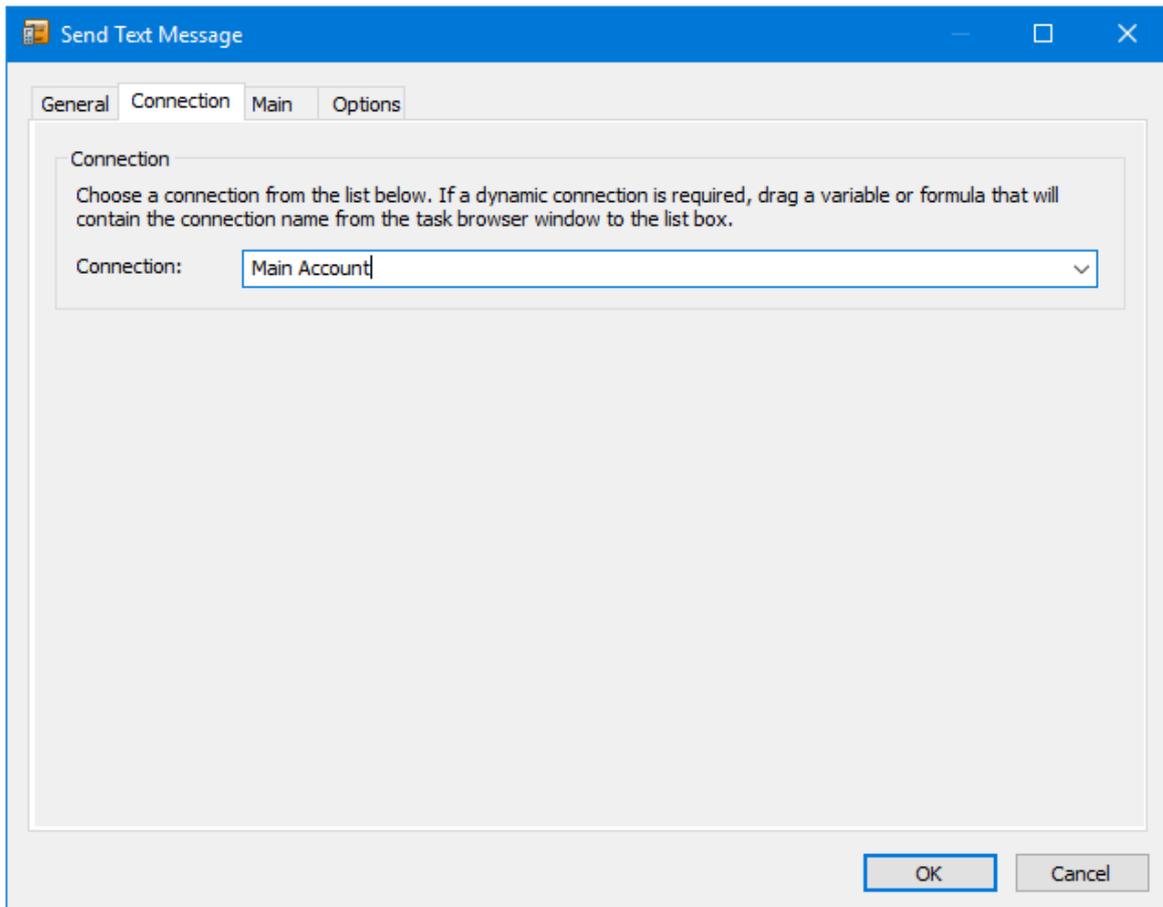
The **General** tab is used to **Name** and describe (**Description**) this task step.

TIP: If this task instance makes use of two or more **Send Text Message** steps, ensure the **Name** used is unique for each individual step.

The **Document Source** drop-down contains all available documents from Format steps previously created in the task; note that the document format is displayed after the step name.

About the Connection Tab

You specify the text message provider **Connection** this step must use.

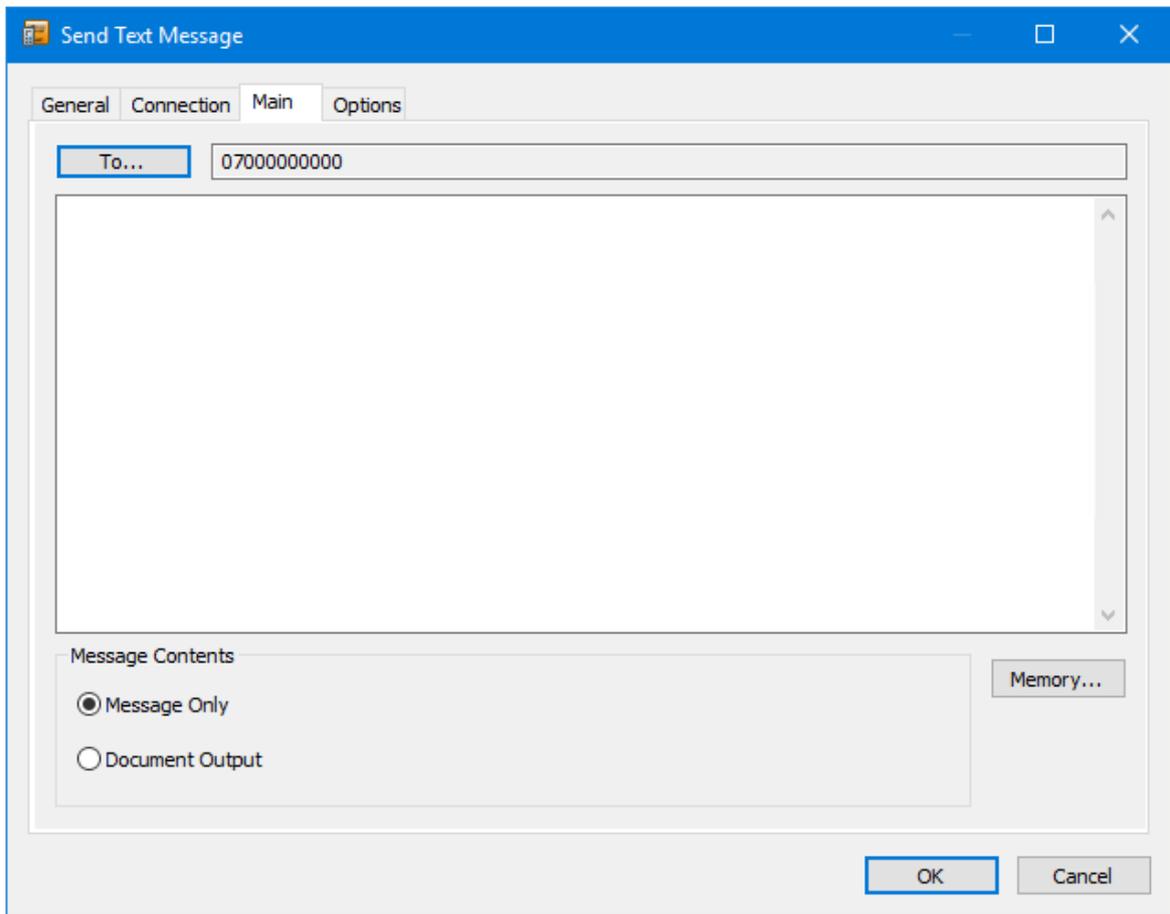


All connections created in the [global configuration](#) are presented here.

Alternatively, you can use a BPA Platform variable or formula to create a dynamic connection, where the connection used is determined by runtime circumstances. At runtime, the contents of the variable must match the name of one of the global connections — this is case-sensitive.

About the Main Tab

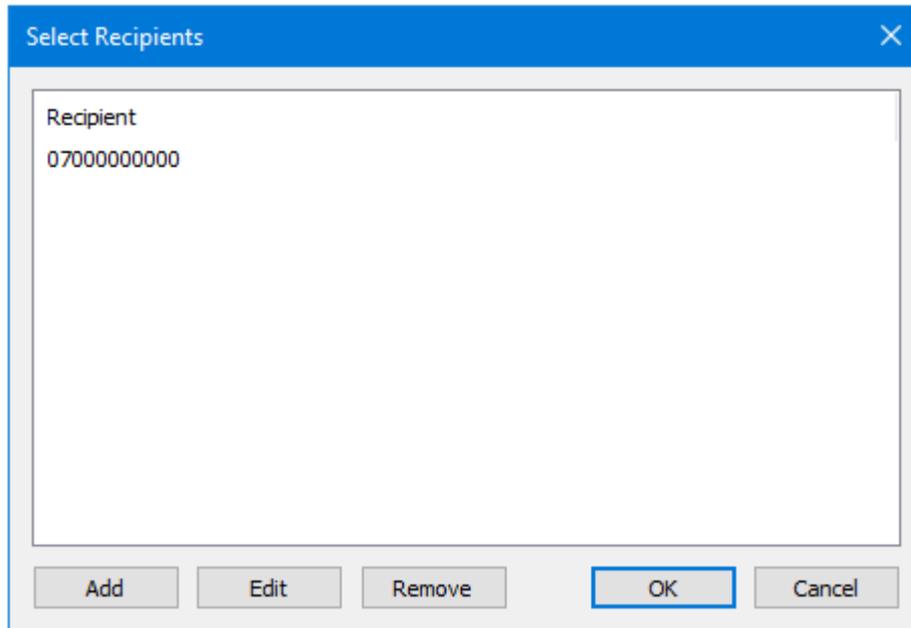
You use the **Main** tab configure the text message:



Use **Memory** to memorise some or all of the step output for use in other task steps. This is particularly useful when the **Send Text Message** step is called multiple times — use **Memory** to compare the text message previously processed to the new text message currently being processed to avoid duplicates.

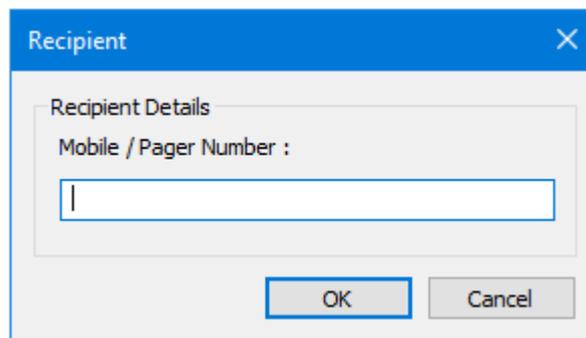
Adding Message Recipients

Use **To** to select the text message recipients.



Choose the mobile or pager number(s) to send the text message to. Use **Edit** and **Remove** to manage the numbers in the **Recipient** list.

If the required number does not appear in the **Recipient** list, click **Add** to add new mobile or pager numbers:



Drag-and-drop variables or recordset columns from the Task Browser to create a dynamic entry.

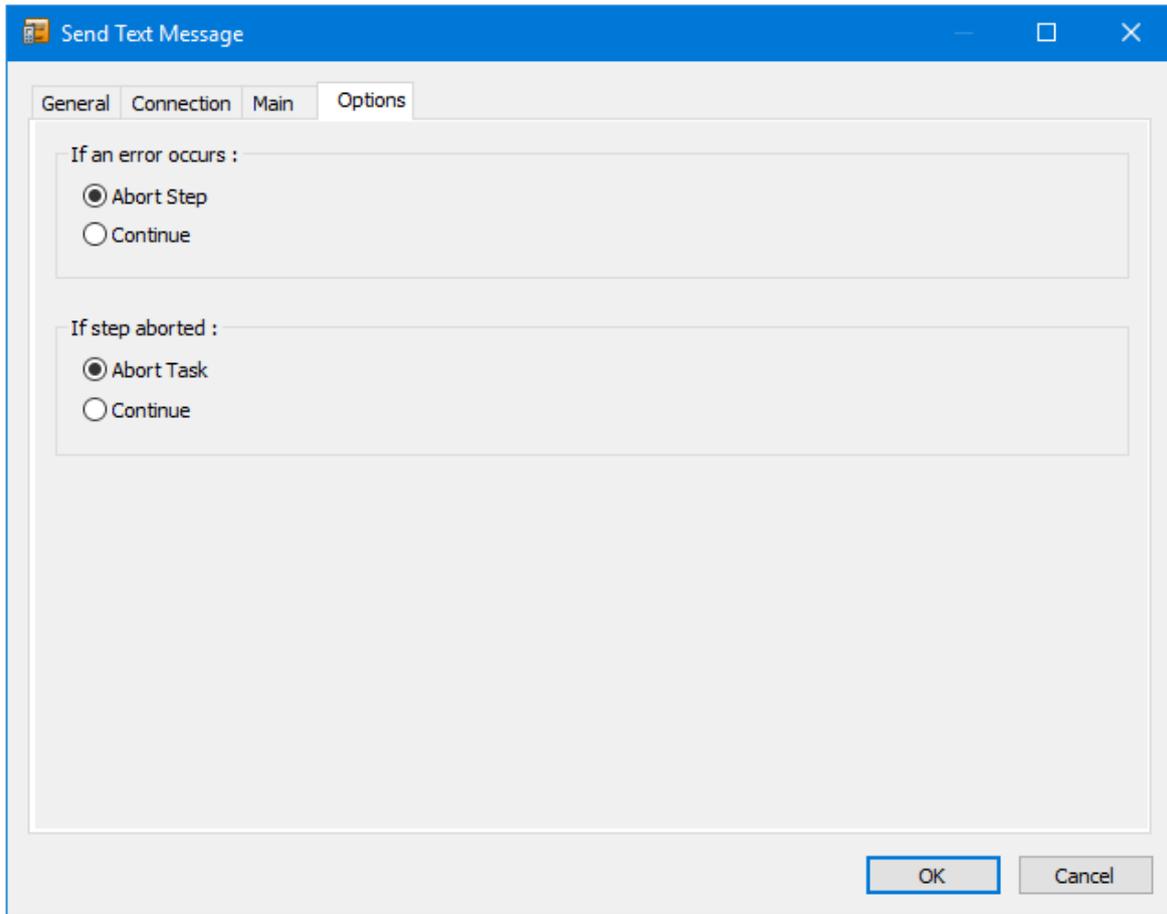
Adding the Text Message Content

You can choose whether the text message consists of:

- ▶ **Message Only** — Enable this option to create the text message in the space provided. Variables, recordset columns, and step properties can be dragged in to create dynamic data.
- ▶ **Document Output** — If a document from a previous task step is being consumed, enable this option to use the consumed document as the text message. Note that this does not allow you to add extra text to the text message.

About the Options Tab

The **Options** tab allows you to define how errors in this step are handled at task runtime.



If an error occurs, you can decide whether the step should **Continue** processing, or terminate the step immediately (**Abort Step**).

If the step is aborted, you can choose to **Continue** processing onto the next step in the task, or terminate the whole task immediately (**Abort Task**).

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