SMS Alerts User Guide

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Introduction

SMS Alerts were introduced as part of PowerPro 2026.

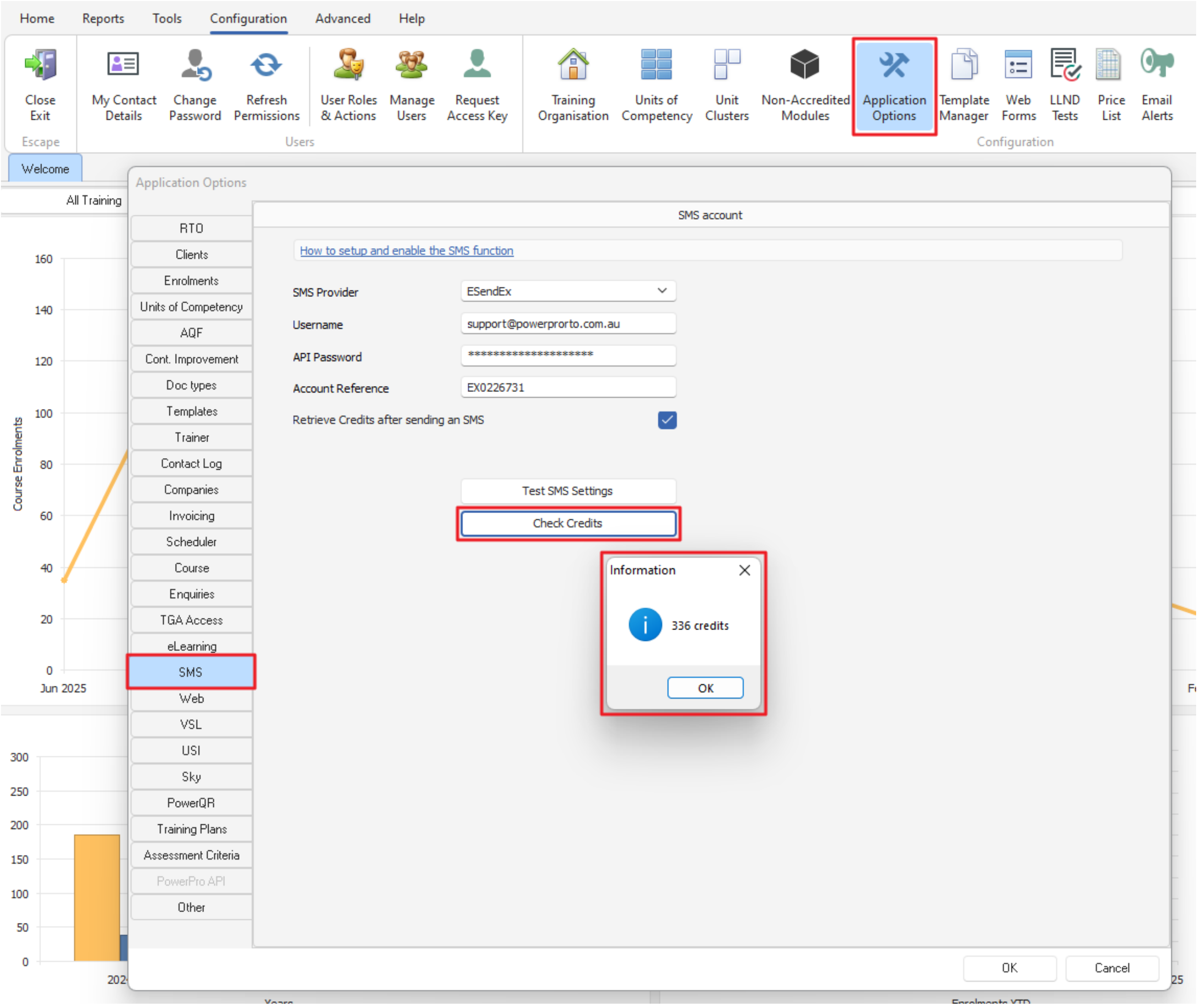
RTOs can configure different SMS alerts to be sent to clients triggered by specific data events (e.g. Course Completion). This assists the client (Student) improving their journey throughout the training program.

SMS Alerts support the consistent application of standard rules and processes and is not intended to be used to manage or facilitate exceptions such as a trainer being away. Standard SMS Client functionality should be used for such situations.

This functionality is not available in the legacy PowerPro RTO desktop version. It is only available in PowerPro Sky.

To use the SMS Alerts functionality, the RTO must subscribe to Esendex SMS by following the instructions in this document (https://www.powerprorto.com.au/tms/qh/esendexgettingstarted.pdf) and ensure that there are SMS credits available.

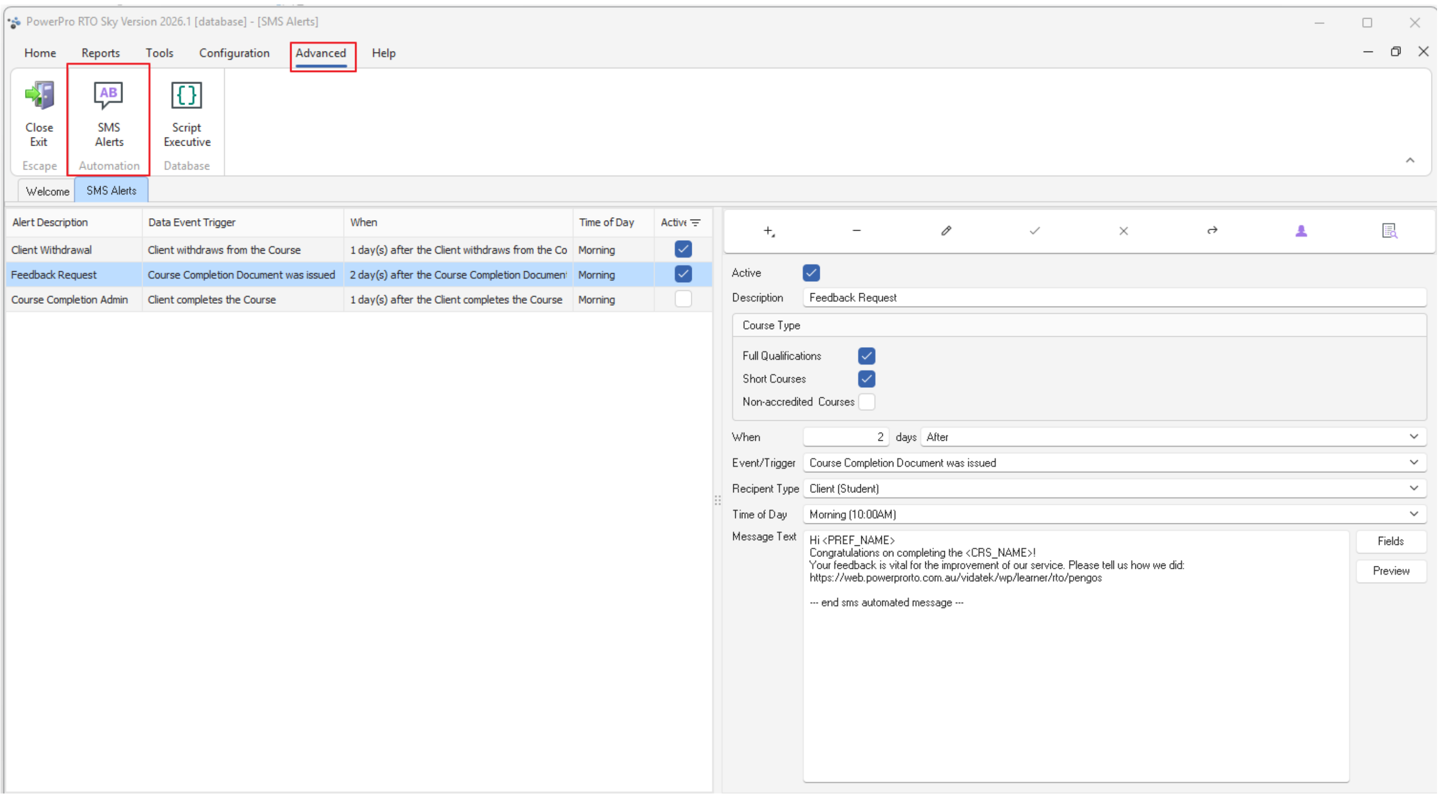
The number of SMS credits available is shown in the PowerPro status bar as well as in Configuration >Application Options >SMS >Check Credits – see next image.



- **Image above: Application Options screen with SMS tab open and Check Credits pop-up displayed**

Configuring SMS Alerts

SMS Alerts are configured in Advanced >SMS Alerts:



- **Image above: The SMS Alerts screen**

This screen is divided into three sections. The left side (highlighted in **red** below) displays the list of existing alerts and whether they are active or not.

The buttons (highlighted in **green** below) on the top right allow the user to create, modify, delete and search for alerts.

Directly underneath these buttons (highlighted in **fuchsia** below) are all the details of that specific alert. These are:

Active Status – whether the alert is active or not.

Alert Description Name – the name of the alert.

Course Type – whether the alerts are used for full qualification course, short courses and/or non-accredited courses.

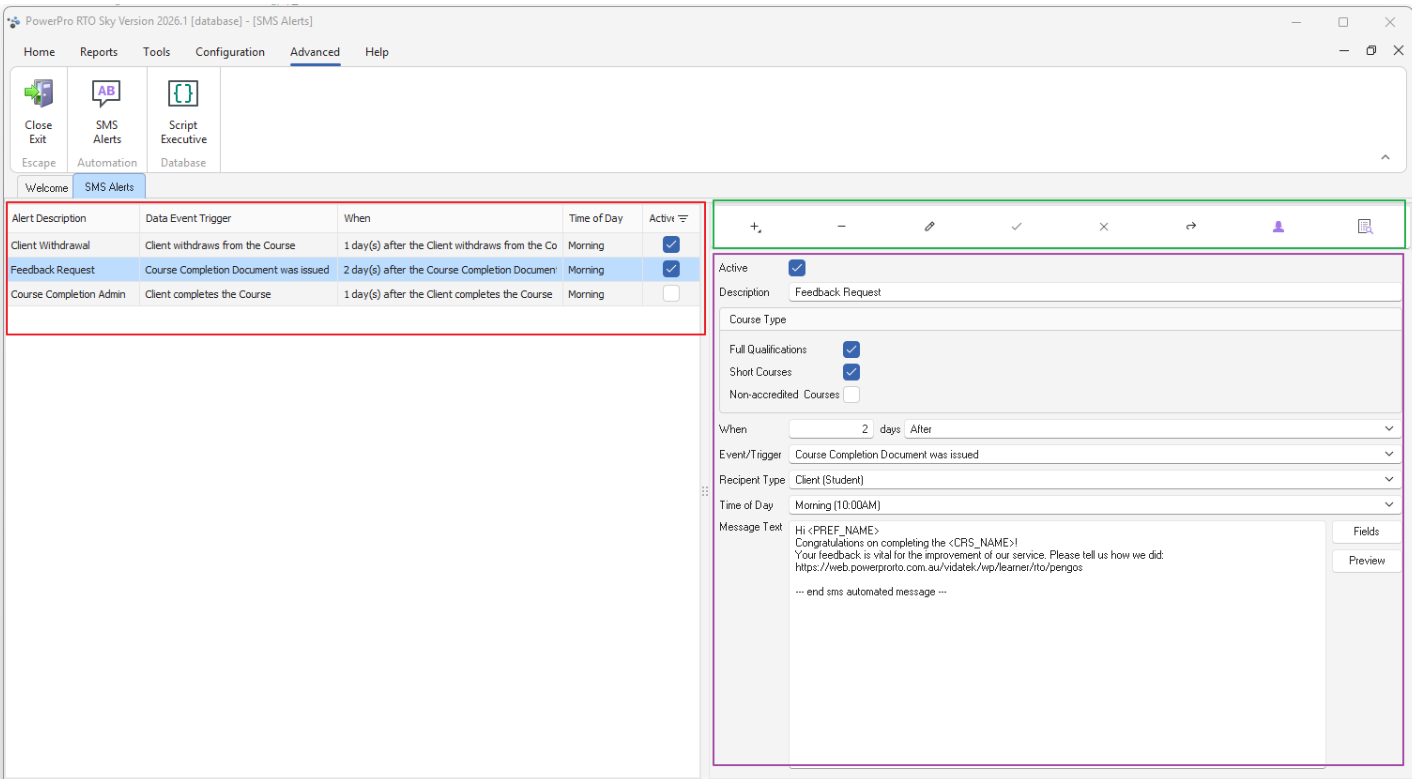
Alert Timing – when the alert is to be sent.

Data Event Type – what type of event triggers the alert to be sent.

Who the alert is to be sent to – either the client (Student) or a specified user defined recipient list.

Alert Sending Time – whether the alert is to be sent in the morning (10am) or afternoon (2pm).

The Alert Message – the actual contents of the message. Merge (dynamic) fields can also be used (e.g. Course Start Date).



- **Image above: SMS Alerts screen with various sections highlighted**

Creating an SMS Alert

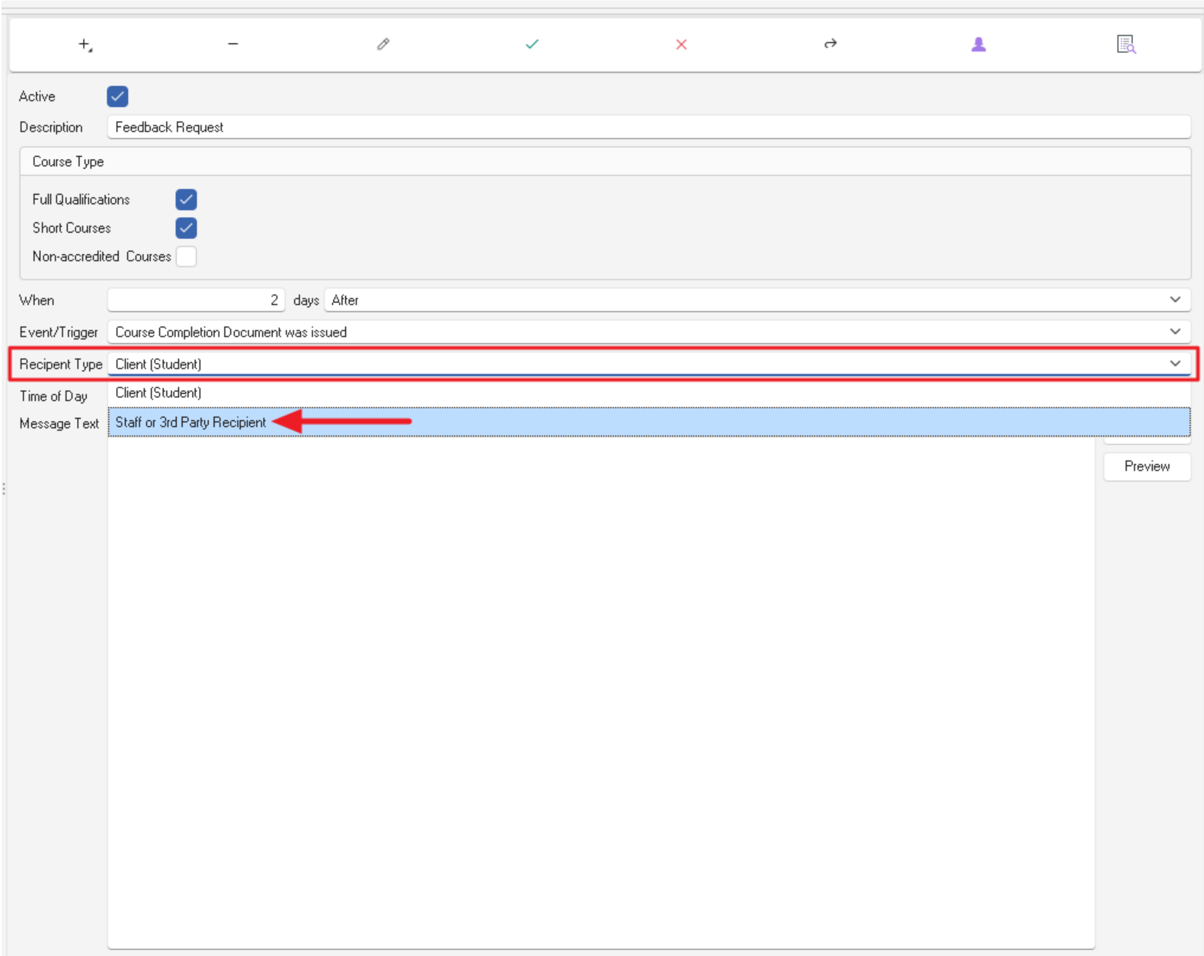
To create a new SMS Alert,

1. Click on the 'Plus' button (green section in above image)
2. By default, the Active Alert checkbox is ticked.
3. Enter an Alert Description. It is recommended to enter a succinct description.
4. Decide whether the alert will be sent to clients in short courses and/or non-accredited courses as well as full qualification courses. Toggle as necessary.
5. Enter when the alert is to be sent, e.g. 2 days after the data event or 1 day before the data event.
6. Select the Data Event from the drop-down menu. Current values are:
    a. Client completes the course
    b. Client withdraws from the course
    c. Course completion document was issued
    d. Course start date
    e. Enrolment expected start date
    f. Student invoice due date
7. Select if the SMS alert is to be sent to a client/s or to a specific recipient list.
8. Select when the alert will be sent – either morning (10am) or afternoon (2pm).
9. Compose the message to be sent. The *Fields* button drops down a list of Merge/Dynamic fields to personalise the message. The message can be previewed using the *Preview* button.
10. Click on the green 'Tick' button (green section in above image) to save the Alert.

Recipient Type

These alerts are typically used to notify clients (students) on events related to their training journey. However, there may cases when you would like to notify someone in the RTO, such as a trainer or a staff member, or external, such as an accounts manager.

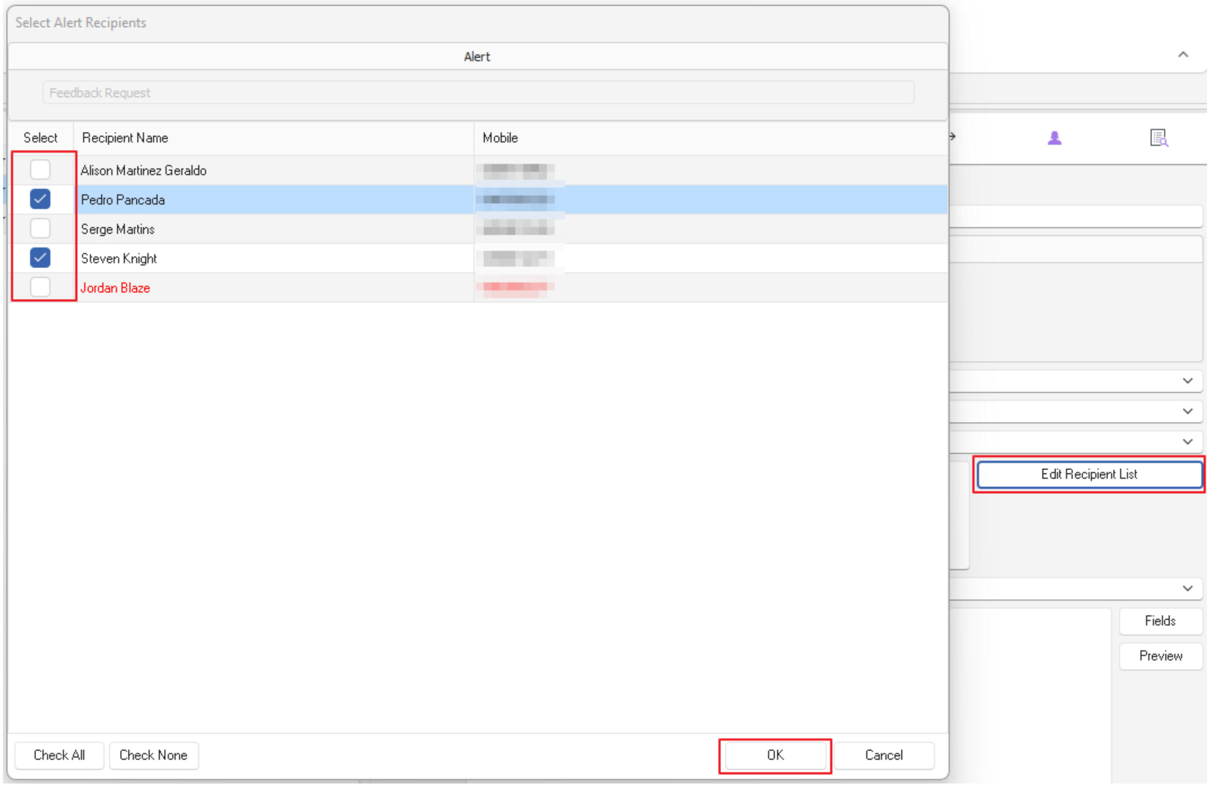
This can be done by setting the Recipient Type to ‘Staff or 3rd Party Recipient’ and configuring the Recipient List:



- **Image above: SMS Alerts Recipient Types**

The Recipient List box will display with an Edit Recipient button shown to the right of the list box.

Click on the Edit Recipient button to view a list of recipients. Click on the Select tick box to select and add required recipients. When all recipients have been added click on the OK button. The recipients will then be displayed in the Recipients List.

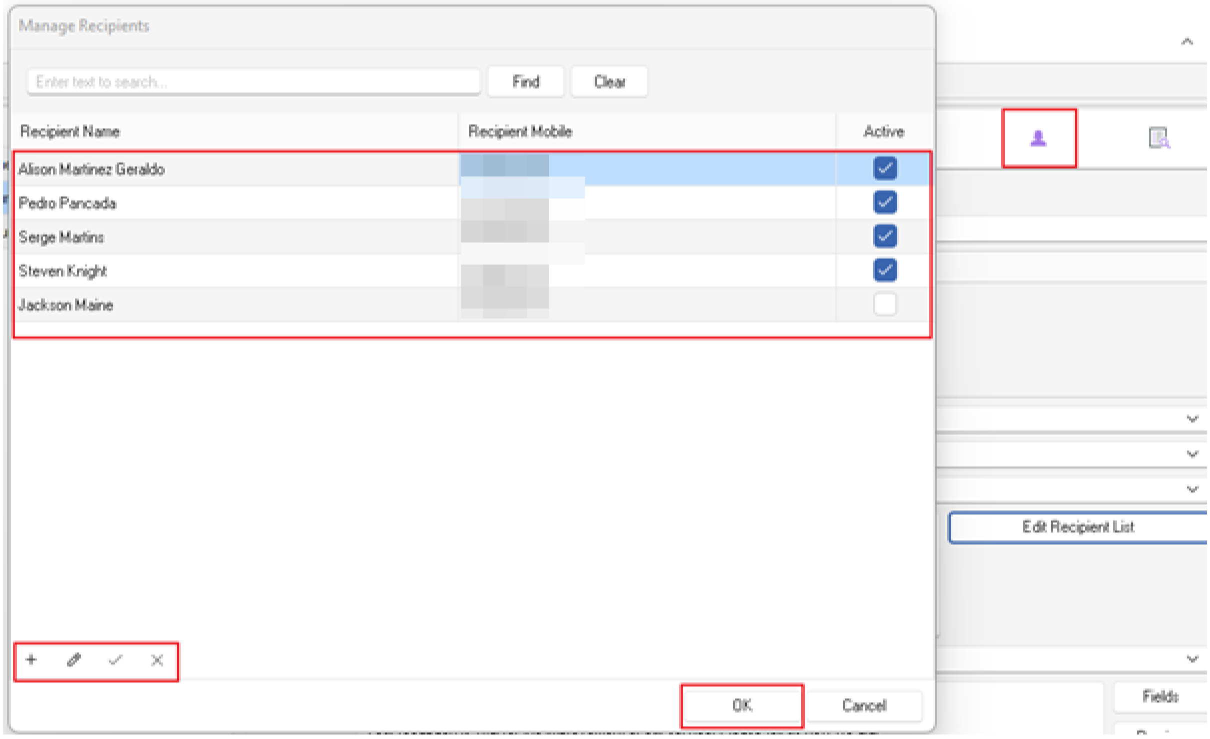


- **Image above: Select Alert Recipients pop-up box**

Adding New Recipients

From time-to-time recipients may need to be added or removed.

To update recipients, click on the Purple Person button. The Manage Recipients pop-up box will be displayed:



- **Image above: Manage Recipients pop-up box**

To add a new recipient, click on the ‘Plus’ symbol, then enter the recipient’s name and mobile number.

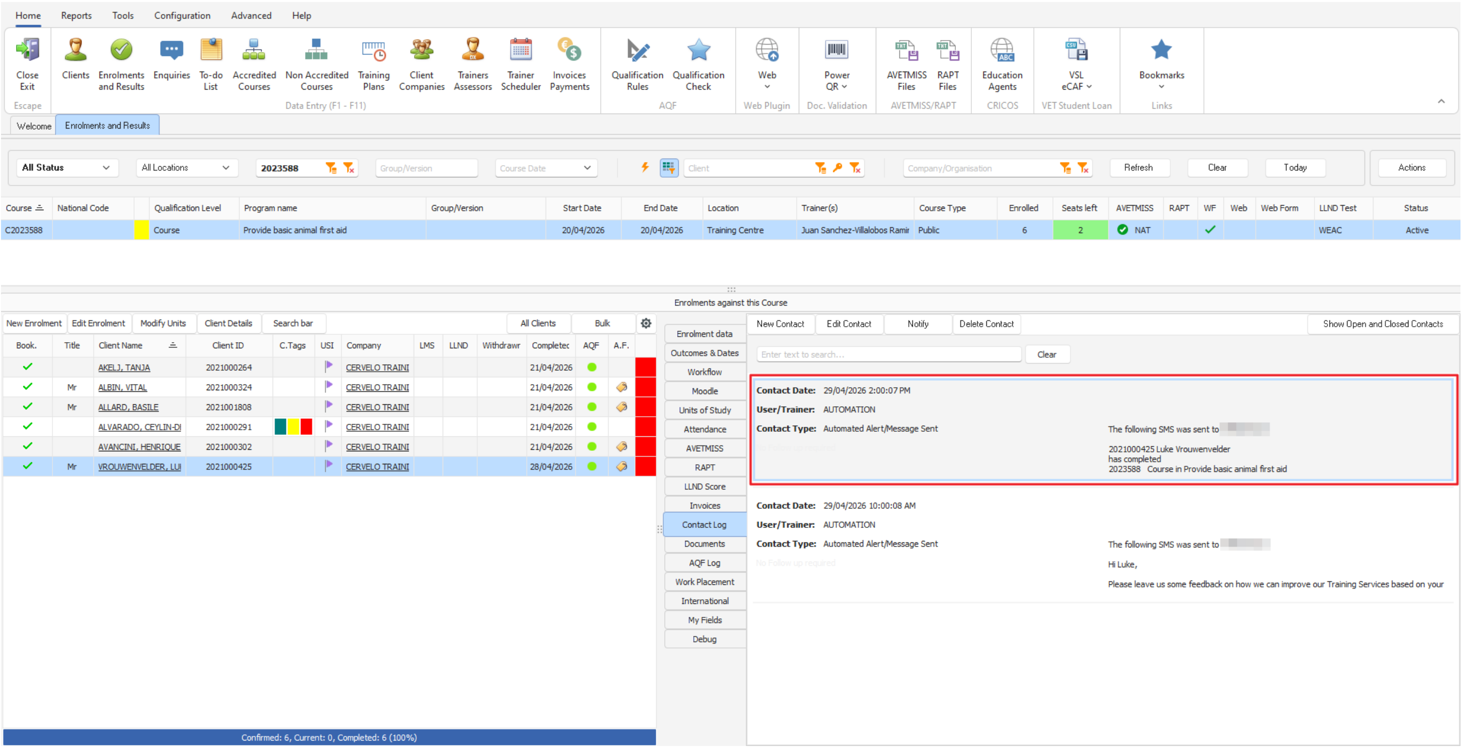
To delete a recipient, highlight them and then click on the red ‘X’ symbol.

To make an existing recipient inactive, uncheck the Active tick box.

When all recipients have been added or removed, client on the green ‘tick’ symbol, then click on the OK button.

Contact Logs

When an SMS alert is sent to a client, a Contact Log is automatically created and attached to the corresponding enrolment.



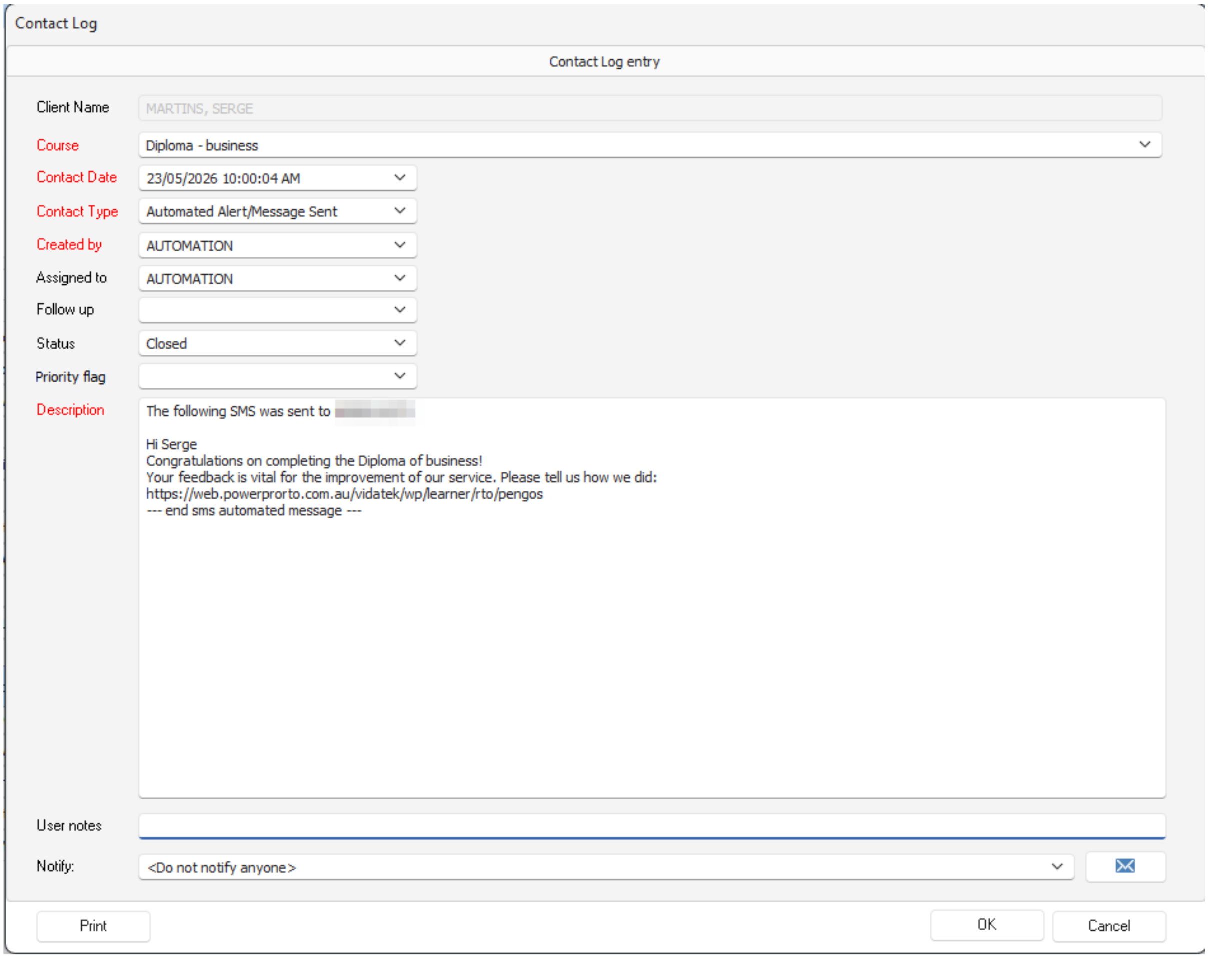
- **Image above: Alert SMS Sent Contact Log**

The description in the Contact Log is the actual SMS text that was sent to the client (student).

The following fields indicate the contact is originated by an SMS Alert:

- **Contact Type:** Automated Alert/Message Sent
- **Created By:** AUTOMATION
- **Sent By:** AUTOMATION

The Contact Log will also be automatically assigned a status of **'closed'**.

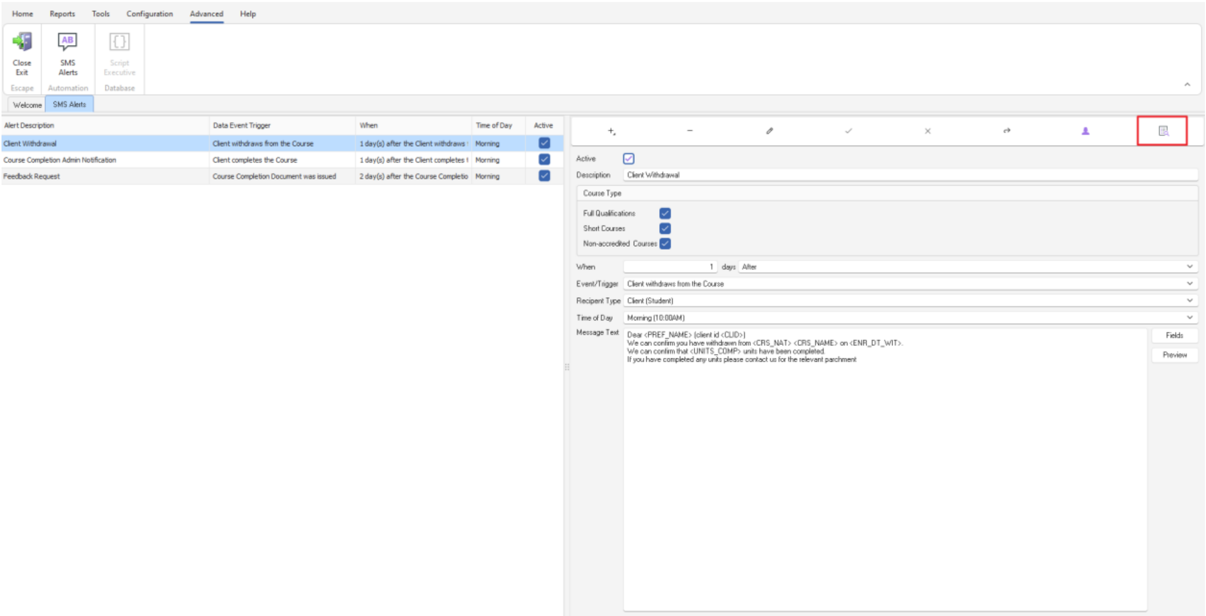


- **Image above: Contact Log screen with SMS Alert contents displayed**

SMS Alerts Log

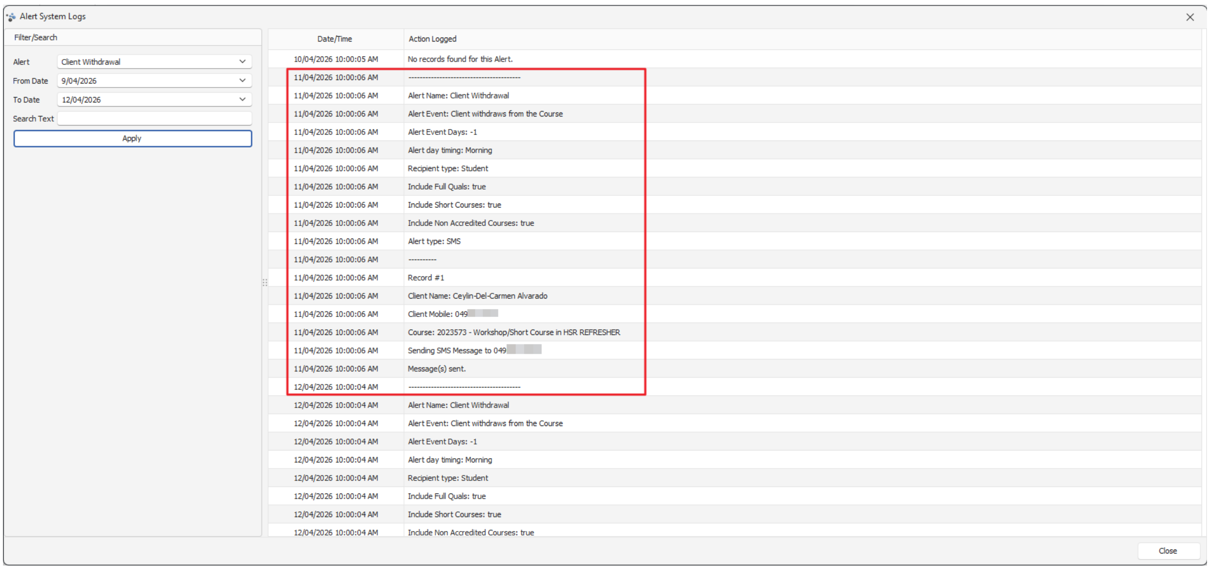
The SMS Alerts Log allows users to view previous actions from the Alert System. This can be used to track when alerts were sent to users for example, or if any alerts were sent on a particular day.

SMS Alerts logging can be viewed by clicking on the Alerts Log icon.



- **Image above: SMS Alerts screen with the Alerts Log Icon highlighted**

To search, select the appropriate Alert, then select a Date Range, then enter any specific search text, if required. The Search Text field is especially helpful when searching for a specific client record. When all required have been entered, click on the Apply button.



- **Image above: SMS Alerts screen with log details displayed**

Troubleshooting

Issues surrounding SMS Alerts will generally fall into four areas:

1. RTO does not have enough SMS credits.
2. Client did not receive SMS as their mobile number field is blank in PowerPro
3. Client did not receive SMS as their mobile number entered into PowerPro was incorrect.
4. There are no clients that fulfil the SMS Alert Data Event criteria.

These issues can be easily verified and resolved by the RTO.