

How To Guide

Use SMS Option

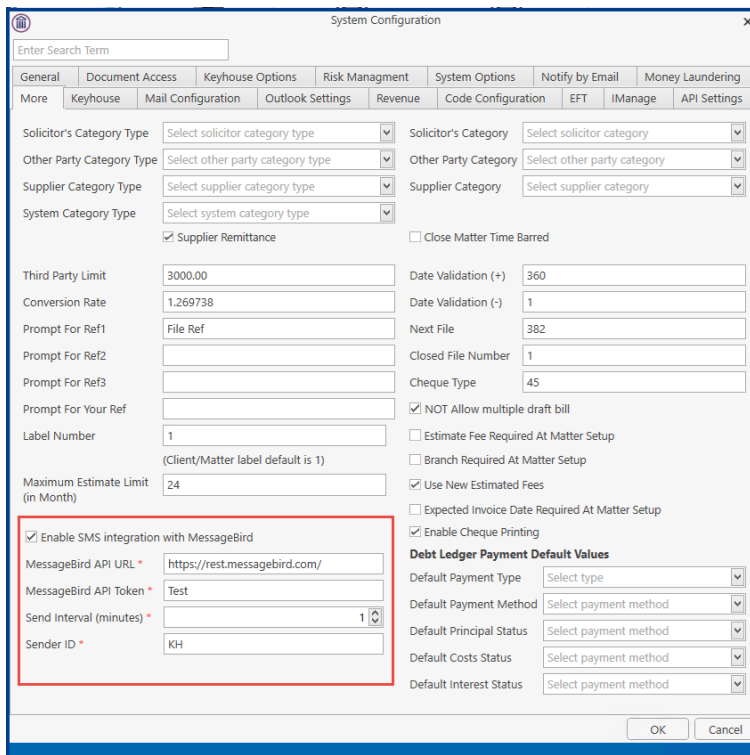
Overview

Using the SMS Option in Keyhouse will enable users to send text messages to both clients and associates from their pc's or laptops. There is also an Opt Out option for clients and associates who do not want to receive messages in this way.

NOTE: Please contact Keyhouse to enable this option to be used.

Activate the SMS Feature

1. Click to the Setup Tab and select System Options
2. On the More Tab, tick the Enable SMS integration with Messagebird



System Configuration

Enter Search Term

General Document Access Keyhouse Options Risk Management System Options Notify by Email Money Laundering

More Keyhouse Mail Configuration Outlook Settings Revenue Code Configuration EFT IManage API Settings

Solicitor's Category Type Select solicitor category type Solicitor's Category Select solicitor category

Other Party Category Type Select other party category type Other Party Category Select other party category

Supplier Category Type Select supplier category type Supplier Category Select supplier category

System Category Type Select system category type

Supplier Remittance Close Matter Time Barred

Third Party Limit 3000.00 Date Validation (+) 360

Conversion Rate 1.269738 Date Validation (-) 1

Prompt For Ref1 File Ref Next File 382

Prompt For Ref2 Closed File Number 1

Prompt For Ref3 Cheque Type 45

Prompt For Your Ref NOT Allow multiple draft bill

Label Number 1 Estimate Fee Required At Matter Setup

(Client/Matter label default is 1) Branch Required At Matter Setup

Maximum Estimate Limit (in Month) 24 Use New Estimated Fees

Enable SMS integration with MessageBird Expected Invoice Date Required At Matter Setup

MessageBird API URL * https://rest.messagebird.com/ Enable Cheque Printing

MessageBird API Token * Test

Send Interval (minutes) * 1

Sender ID * KH

Debt Ledger Payment Default Values

Default Payment Type Select type

Default Payment Method Select payment method

Default Principal Status Select payment method

Default Costs Status Select payment method

Default Interest Status Select payment method

OK Cancel

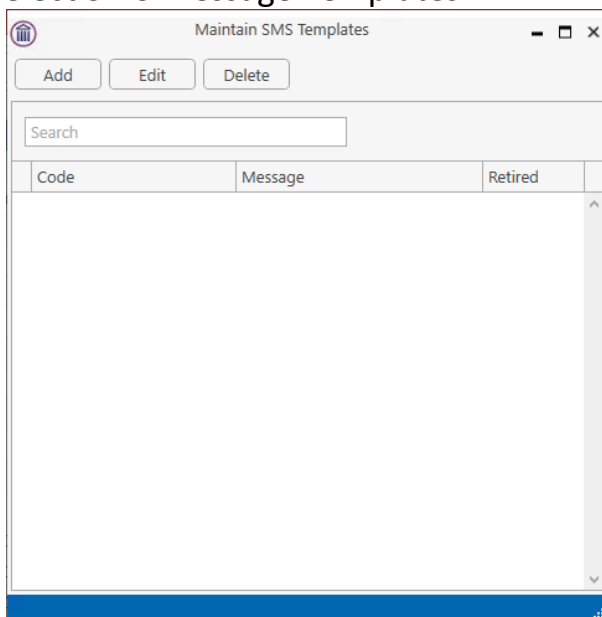
3. Enter the MessageBird API Token received from Keyhouse, the Sent the Interval (minutes) and the Sender ID, then Click OK.

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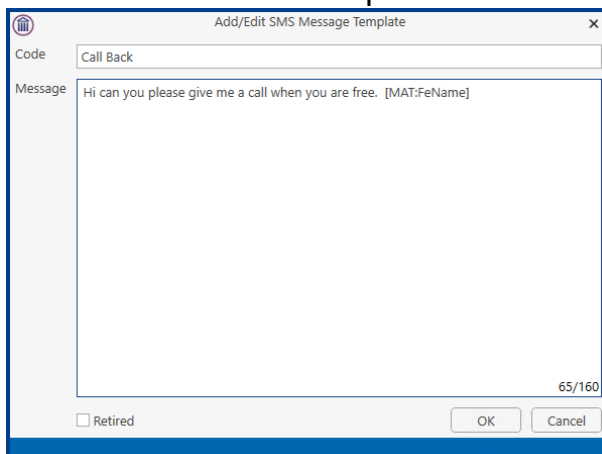
Create Template Messages

Template message can be set up by users and these can be coded using the Document Assist.

1. Open the Document Assist on the Setup Tab
2. Click to the Maintain Tab and select Other Codes
3. Select SMS Message Templates



4. Click the Add button to open a blank template



5. Set the code and enter the message.

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6. To add Document Assist codes, search for the code, then right click and select Copy.
7. Click on the message window and paste in the code.
NOTE: There is a maximum number of characters of 160 so ensure that when the message is generated, the value for the code will not result in the message exceeding the maximum number of characters.
8. Click OK.