Keyhouse Computing Ltd.
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Sending SMS Messages
using Keyhouse

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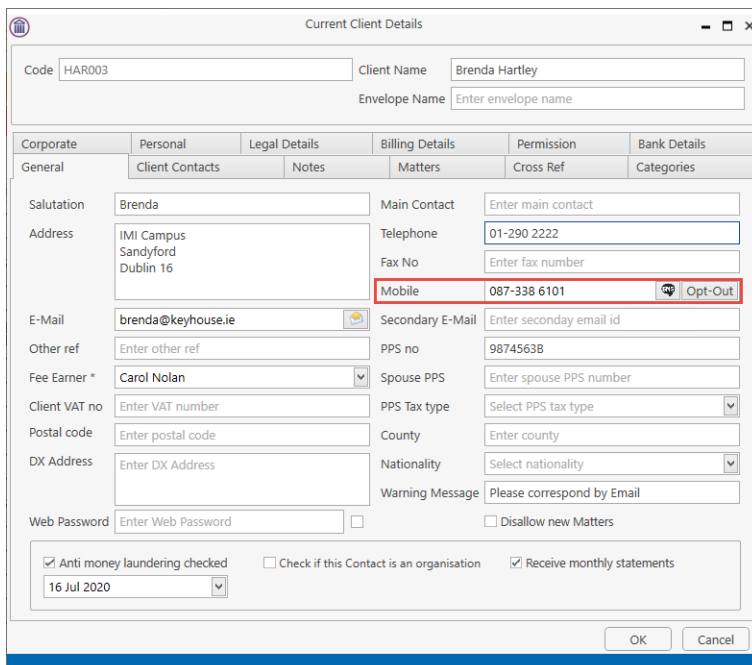
How To Guide

Use the 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: This feature must be activated by your System Administrator before it can be used. In addition, template messages can also be created for use by your System Administrator.

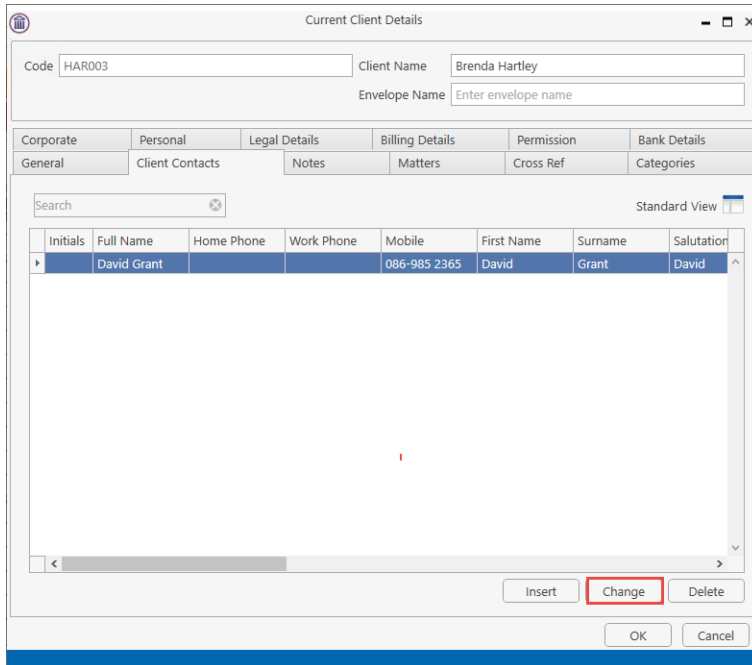**Adding Mobile Numbers for Clients and Client Contacts**

1.   Open a matter for the client and click to Current Client Details.

2.   Enter the mobile number in the format of your choice and click OK to save.

3. To add a mobile number for a client contact, click to Client Contacts Tab in the Current Client Details.
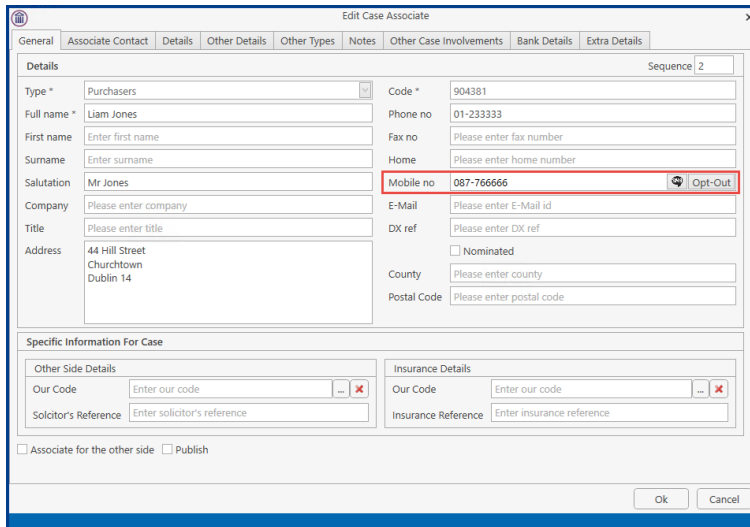

4. Click Change

5. Enter the mobile number in the format of your choice and click OK and OK again to close the Current Client Details.

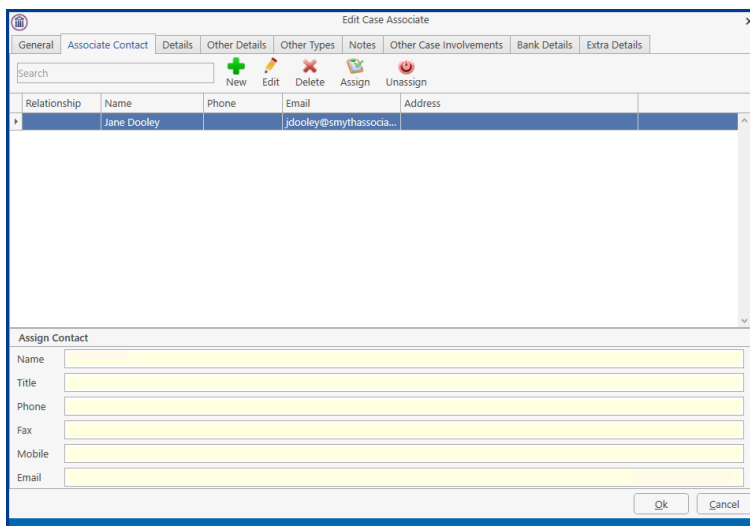**Adding Mobile Numbers for Associates and Associate Contacts**

This can be done from the Associates Option on the Search/Open Screen or from the Associates section of the Matter.

1. Open the Associates section and select the required associate, double click to open.
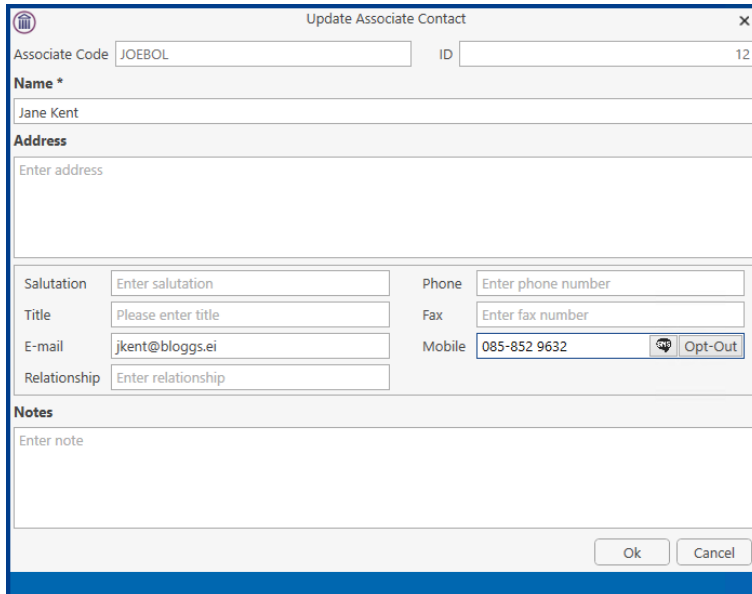

2. Enter the mobile number in the format of your choice and click OK.

3. To add the mobile number to an Associate Contact, open the associate and click to the Associate Contact Tab.

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4.   Double Click on the Associate Contact or right click and click Edit to open the Associate Contact.


5.   Enter the mobile number in the format of your choice and click Ok. Click OK to close the Associate Tab.
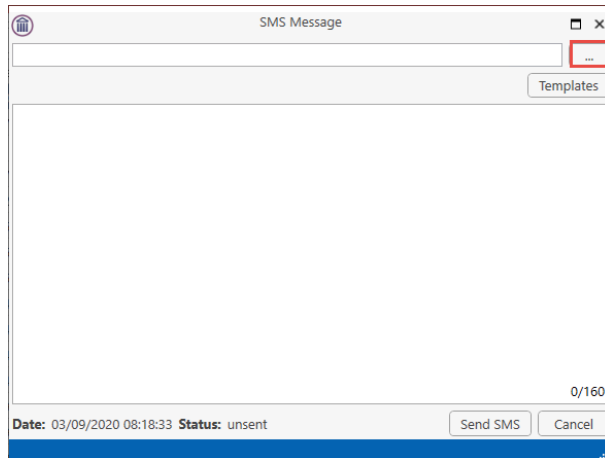
Send an SMS Message

This can be done in three different ways.

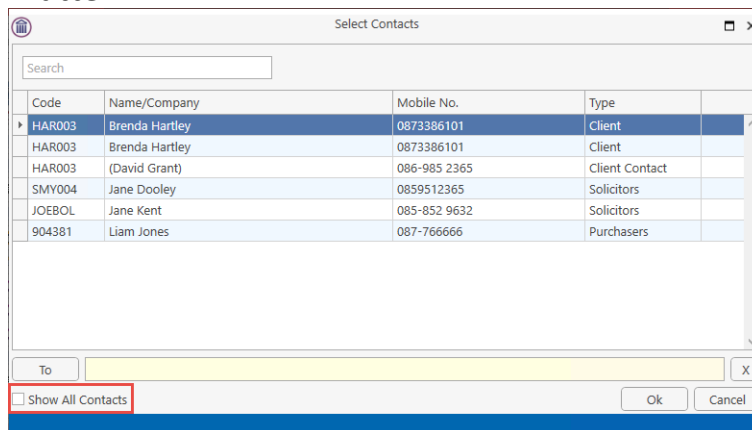**Option 1 - Using New Item Option where the mobile number is recorded on the system.**

1.   Open the matter you wish to send the SMS message from.
2.   Click on the New Item button.
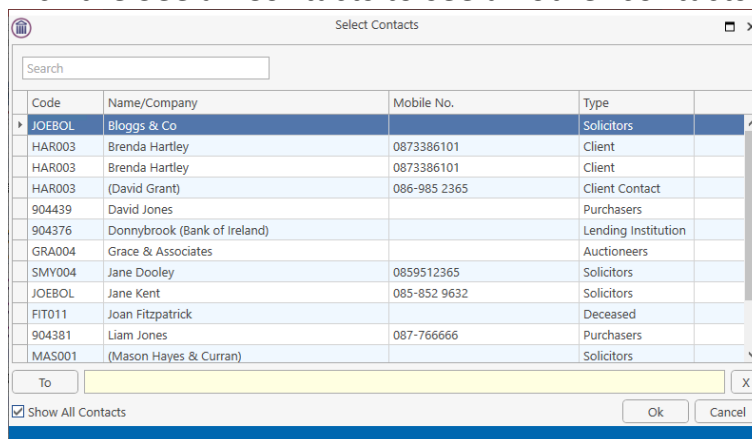3.   Select SMS Message to open the message Window
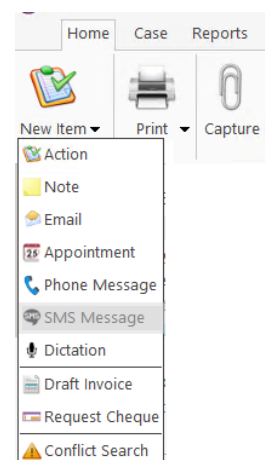
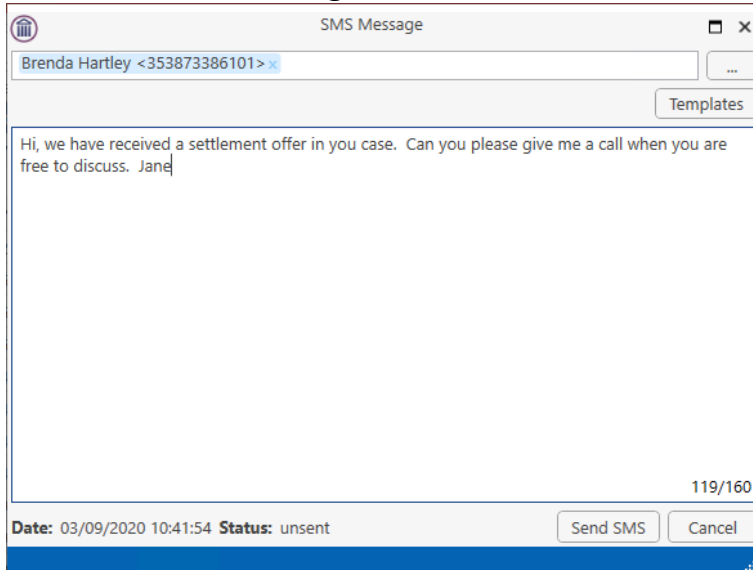4. Click on the Browse Button to see all the mobile numbers assigned to the matter.

5. Tick the See all Contacts to see all other contacts on the matter.

6. Select the contact to receive the text from the list.
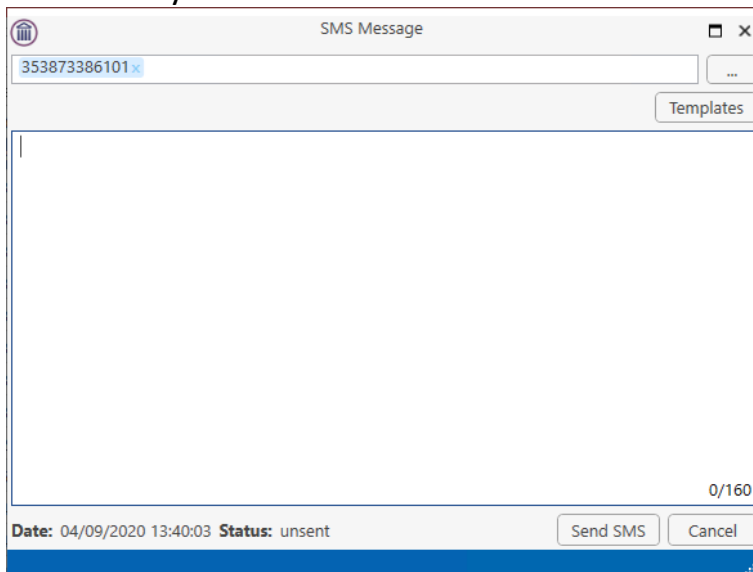
7. Enter the SMS message and click Send SMS.

NOTE: The message is restricted to 160 characters and a count is visible in the bottom right of the window.

Option 2 - Using New Item Option where the mobile number is not record on the system.

1. Open the matter you wish to send the SMS message from.
2. Click on the New Item button.
3. Select SMS Message to open the message Window
4. Manually enter the mobile number using the international format followed by a semi colon.

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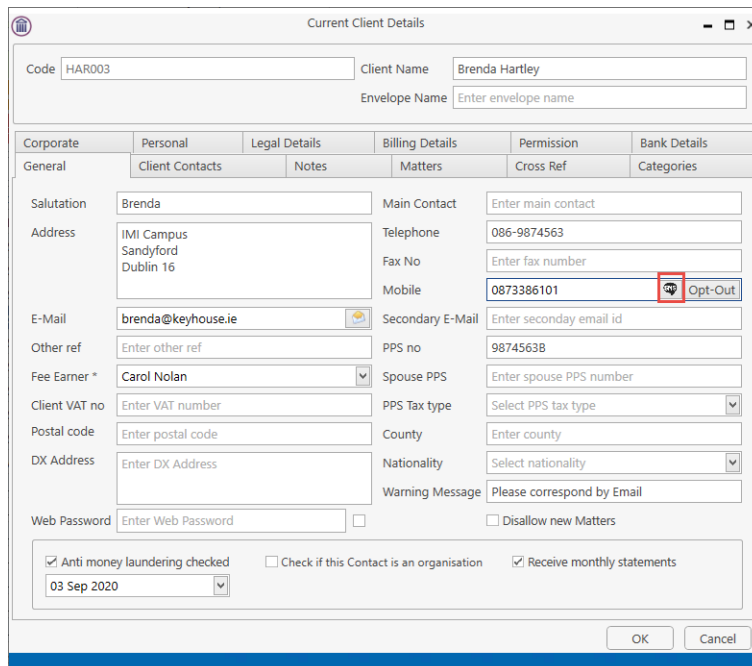Call +353 1 2902222
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NOTE: If the ; is missing, the message will not be sent and the status will appear in the case diary as 'Unsent'.

NOTE: The message is restricted to 160 characters and a count is visible in the bottom right of the window.

Option 3 – Using the SMS Button on the Mobile Number

1. Open the Current Client Details or the Associate Details.
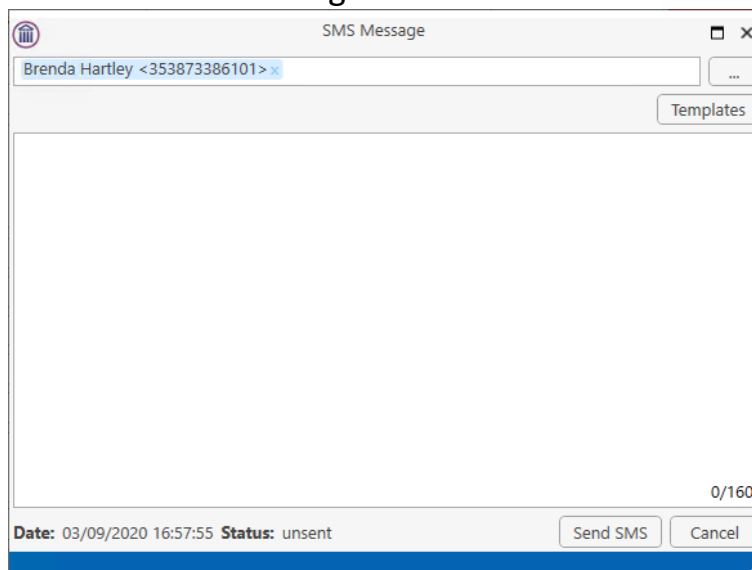2. Click on the SMS Button beside the mobile number.


3. Enter the SMS message and click Send SMS.

NOTE: The message is restricted to 160 characters and a count is visible in the bottom right of the window.

4.   Close the Current Client Details or Associate Details.

Using Templates

1.   If you wish to use a Template message, select Template.
NOTE: The templates must be set up by the System Administrator.

2.   Double click on the Template required and click Send SMS.
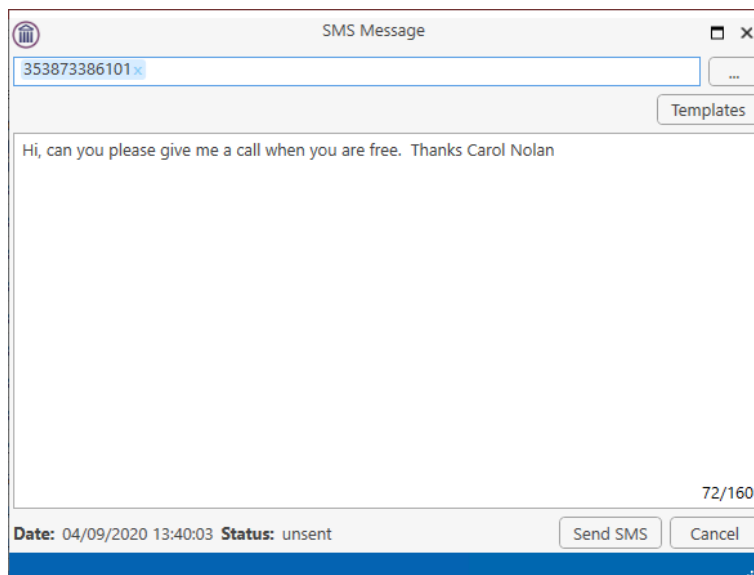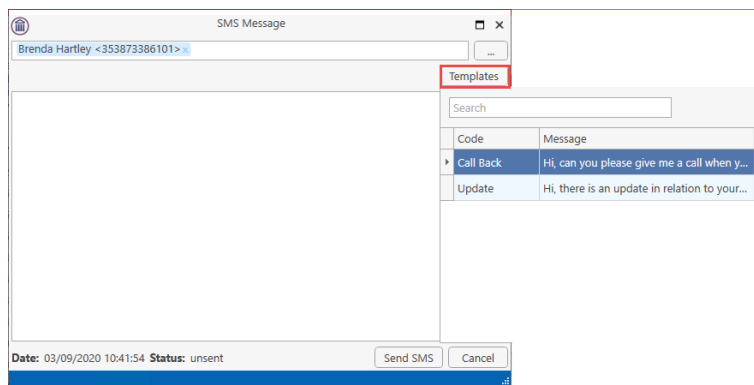
3.   Click Send SMS.

Case Diary

1.   The SMS will appear in the Case Diary as a completed action with the status of the message visible.

✅	📱			12 Aug 2020	16:25	CN	Status: Delivered

2. The status of the message can also be seen. The status will be one of 4 options.
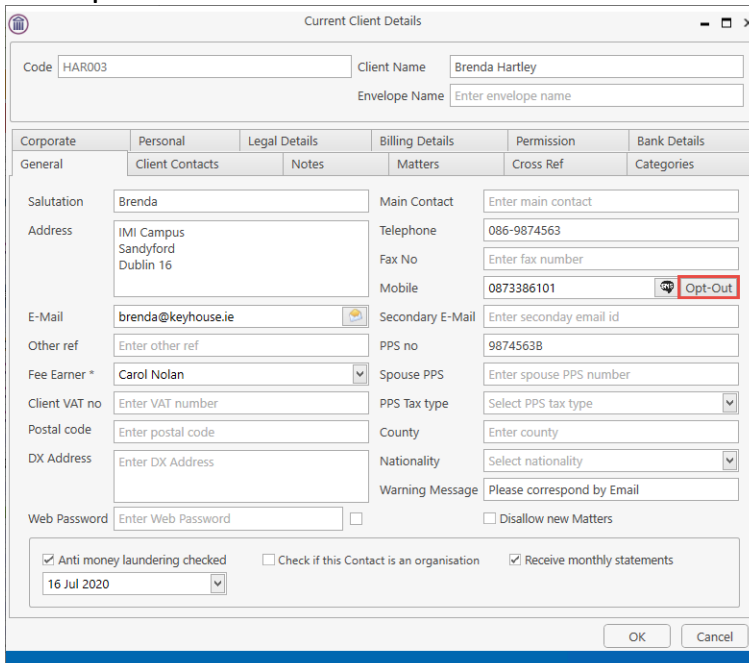
Status: Unsent	The message has not been sent
Status: Sent	The message has been sent but not yet delivered
Status: Delivered	The message has been delivered
Status: DELIVERY FAILED	The message was sent but not delivered

3. If the delivery fails, then a new message will need to be created.

Opting Out

If a client or an associate do not want to receive text messages, the Opt Out option can be set.
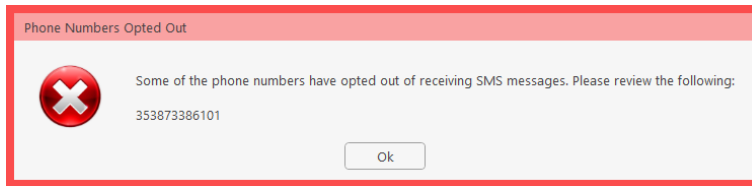
1. Open the Current Client Detail or the Associate Details and click the Opt Out option beside the mobile number.

2. If a user tries to send a message, using any of the options, the following warning will appear.

3. If the client or associate wishes to receive, then click on the Opt In button to re-enable the feature.