

# Sending SMS Messages using Keyhouse

## How To Guide

# Use the SMS Option

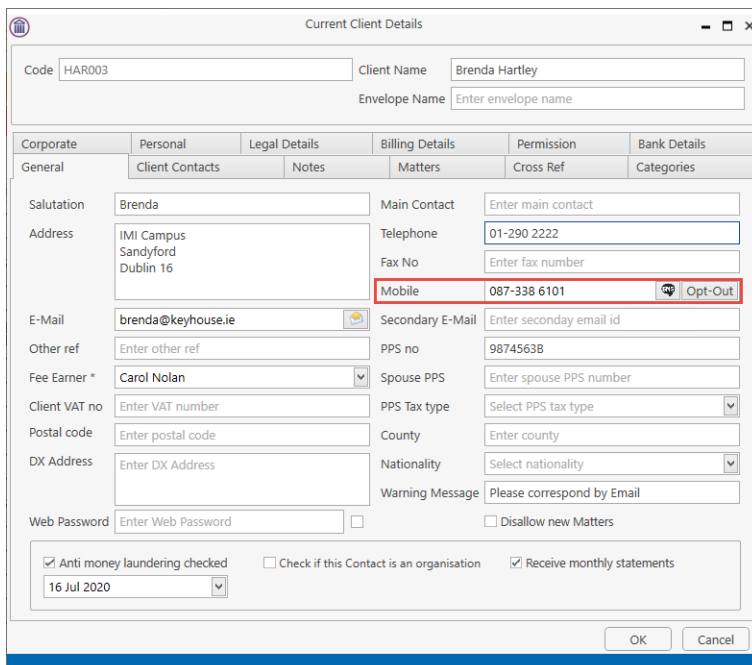
## Overview

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

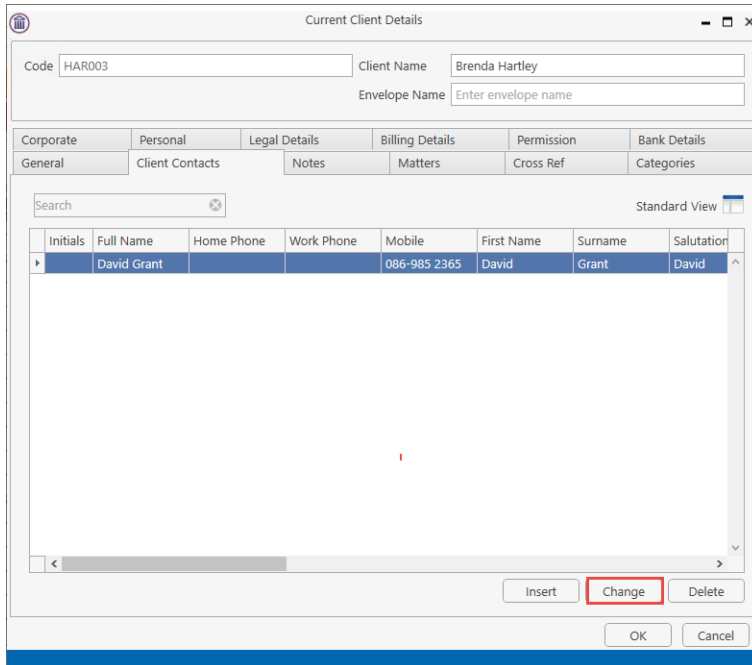
1. Open a matter for the client and click to Current Client Details.
2. Enter the mobile number in the format of your choice and click OK to save.



The screenshot shows the 'Current Client Details' window. The 'Client Name' is 'Brenda Hartley' and the 'Code' is 'HAR003'. The 'Mobile' field is highlighted with a red box and contains the number '087-338 6101'. Next to the mobile number is an 'Opt-Out' button. The window also shows other fields like 'Address', 'E-Mail', 'Telephone', and 'Fax No'.

## How To Guide

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



Current Client Details

Code: HAR003 Client Name: Brenda Hartley  
Envelope Name: Enter envelope name

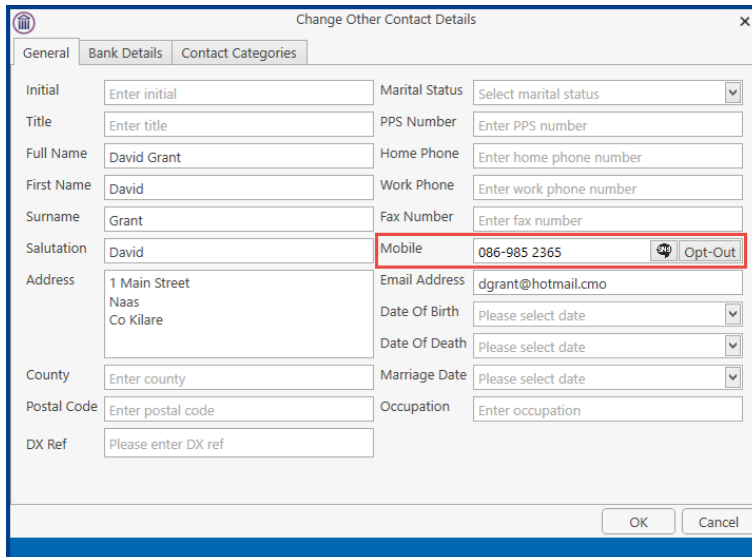
Corporate Personal Legal Details Billing Details Permission Bank Details  
General Client Contacts Notes Matters Cross Ref Categories

Search: Standard View

Initials	Full Name	Home Phone	Work Phone	Mobile	First Name	Surname	Salutation
	David Grant			086-985 2365	David	Grant	David

Insert Change Delete  
OK Cancel

- Click Change



Change Other Contact Details

General Bank Details Contact Categories

Initial: Enter initial Marital Status: Select marital status  
Title: Enter title PPS Number: Enter PPS number  
Full Name: David Grant Home Phone: Enter home phone number  
First Name: David Work Phone: Enter work phone number  
Surname: Grant Fax Number: Enter fax number  
Salutation: David Mobile: 086-985 2365 Opt-Out  
Address: 1 Main Street, Naas, Co Kildare Email Address: dgrant@hotmail.cmo  
Date Of Birth: Please select date  
Date Of Death: Please select date  
County: Enter county Marriage Date: Please select date  
Postal Code: Enter postal code Occupation: Enter occupation  
DX Ref: Please enter DX ref

OK Cancel

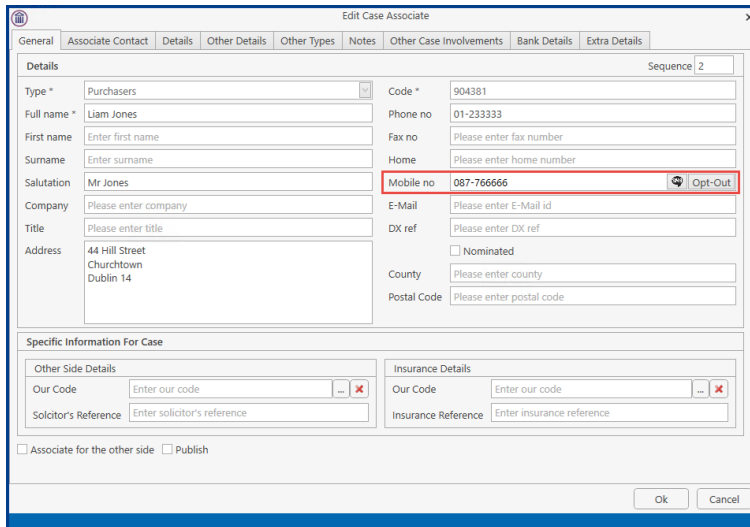
- Enter the mobile number in the format of your choice and click OK and OK again to close the Current Client Details.

## How To Guide

### Adding Mobile Numbers for Associates and Associate Contacts

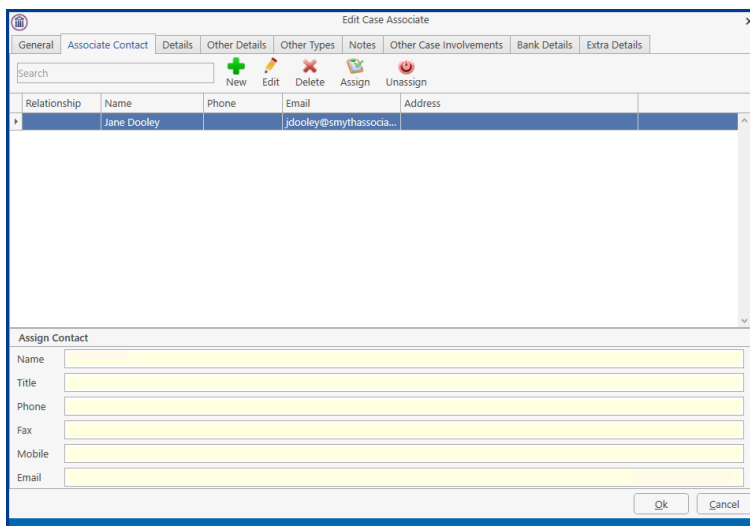
This can be done from the Associates Option on the Search/Open Screen or from the Associates section of the Matter.

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



The screenshot shows the 'Edit Case Associate' window with the 'Details' tab selected. The 'Mobile no' field is highlighted in red and contains the number '087-766666'. Other fields include 'Type' (Purchasers), 'Full name' (Liam Jones), 'Salutation' (Mr Jones), and 'Address' (44 Hill Street, Churchtown, Dublin 14). The 'Opt-Out' button is located to the right of the mobile number field.

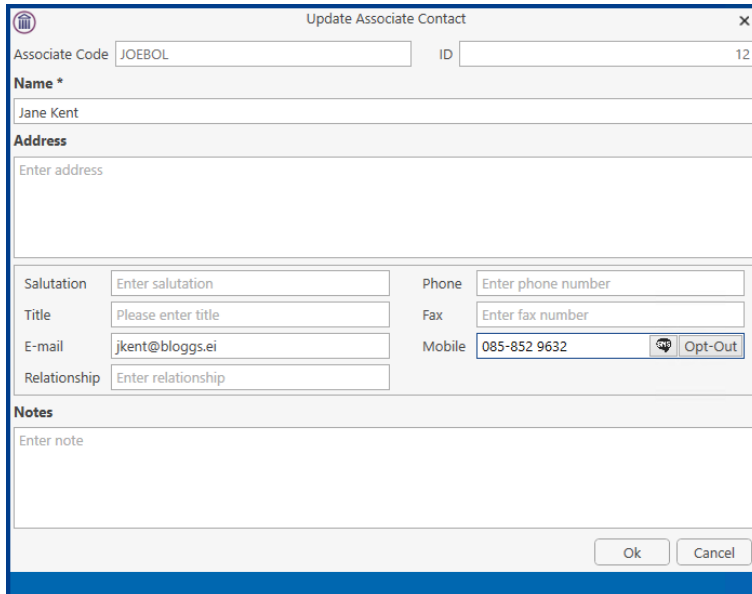
2. Enter the mobile number in the format of your choice and click OK.
3. To add the mobile number to an Associate Contact, open the associate and click to the Associate Contact Tab.



The screenshot shows the 'Edit Case Associate' window with the 'Associate Contact' tab selected. The 'Assign Contact' section is visible, with fields for Name, Title, Phone, Fax, Mobile, and Email. The 'Mobile' field is highlighted in yellow. The 'Name' field contains 'Jane Dooley' and the 'Email' field contains 'jdooley@smythassocia...'. The 'Opt-Out' button is also visible in the top right corner.

## How To Guide

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



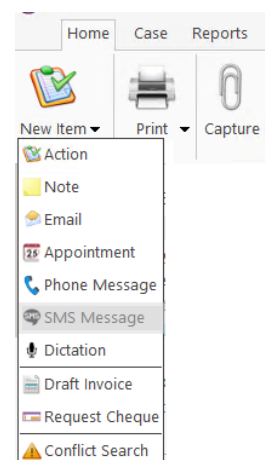
5. Enter the mobile number in the format of your choice and click Ok. Click OK to close the Associate Tab.

### Send an SMS Message

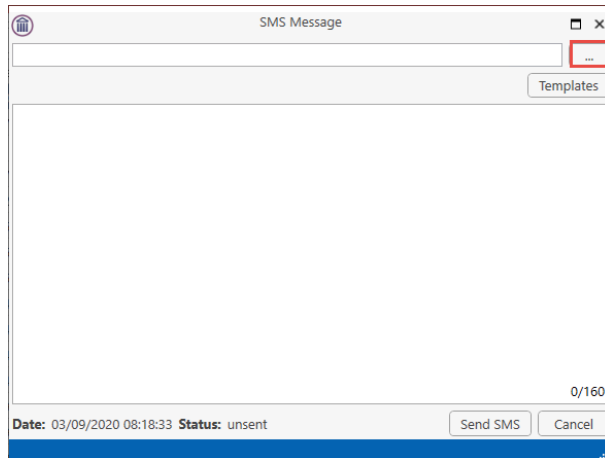
This can be done in three different ways.

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

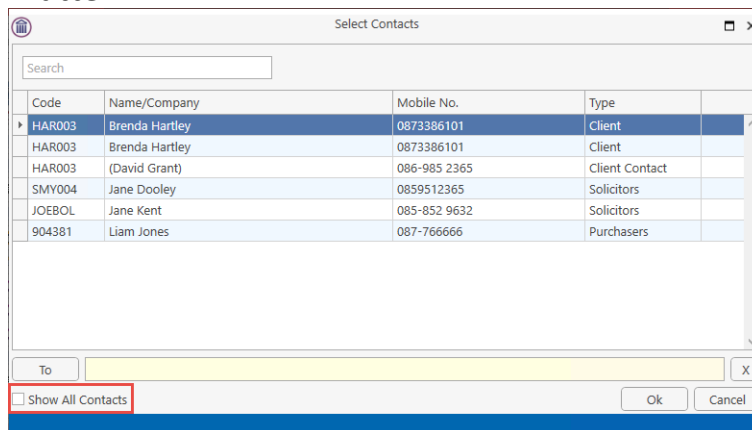
1. Open the matter you wish to send the SMS message from.
2. Click on the New Item button.
3. Select SMS Message to open the message Window



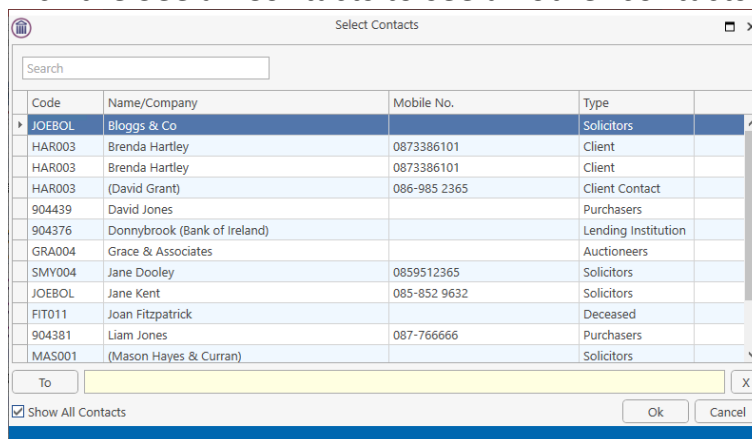
## How To Guide



- Click on the Browse Button to see all the mobile numbers assigned to the matter.



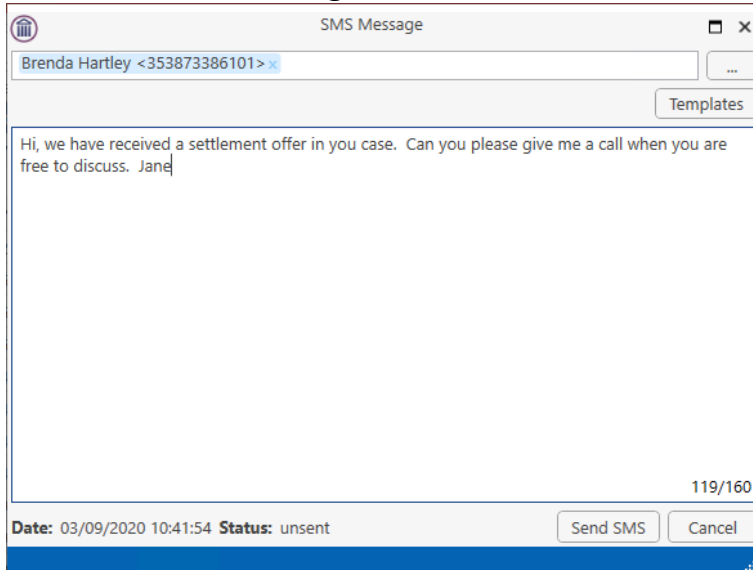
- Tick the See all Contacts to see all other contacts on the matter.



- Select the contact to receive the text from the list.

## How To Guide

### 7. Enter the SMS message and click Send SMS.

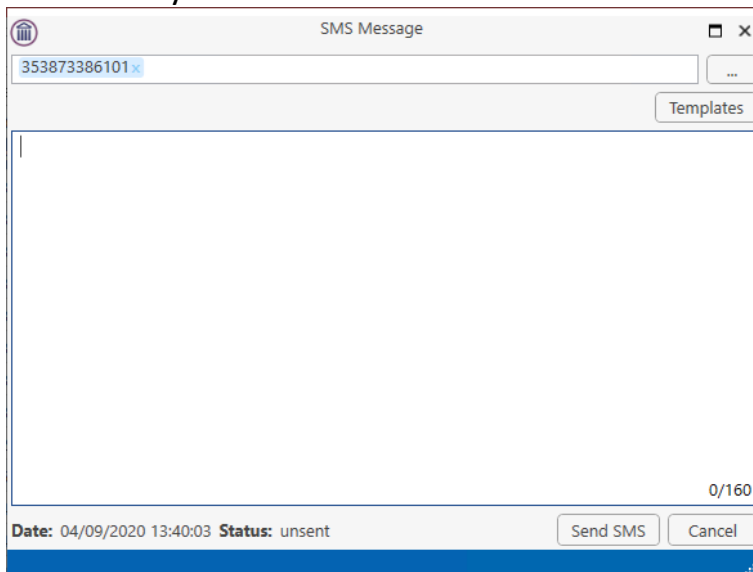


The screenshot shows the 'SMS Message' window. At the top, there is a header with the Keyhouse logo and the text 'SMS Message'. Below the header is a recipient field containing 'Brenda Hartley <353873386101> x'. To the right of the recipient field is a 'Templates' button. The main body of the window is a text area containing the message: 'Hi, we have received a settlement offer in you case. Can you please give me a call when you are free to discuss. Jane'. At the bottom right of the text area, the character count '119/160' is visible. At the bottom of the window, there is a status bar showing 'Date: 03/09/2020 10:41:54 Status: unsent' and two buttons: 'Send SMS' and 'Cancel'.

**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.



The screenshot shows the 'SMS Message' window. At the top, there is a header with the Keyhouse logo and the text 'SMS Message'. Below the header is a recipient field containing '353873386101 x'. To the right of the recipient field is a 'Templates' button. The main body of the window is an empty text area. At the bottom right of the text area, the character count '0/160' is visible. At the bottom of the window, there is a status bar showing 'Date: 04/09/2020 13:40:03 Status: unsent' and two buttons: 'Send SMS' and 'Cancel'.

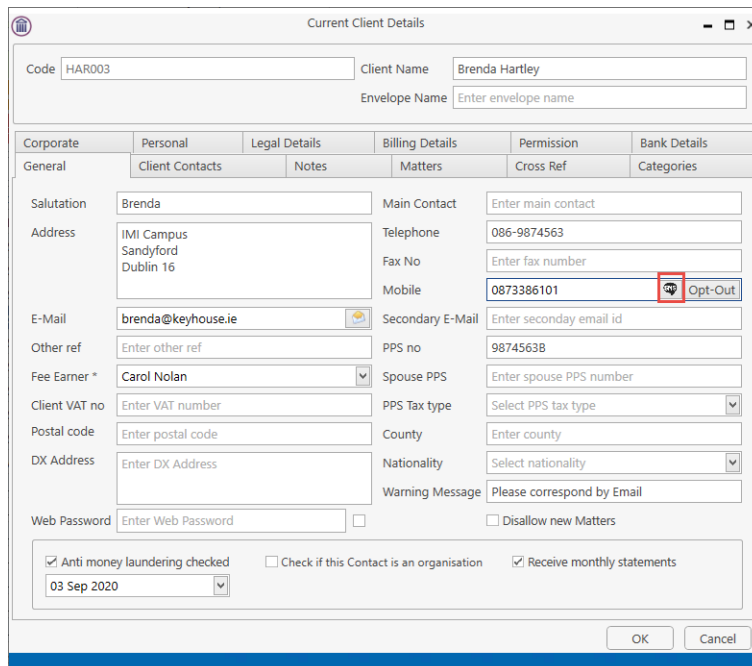
## How To Guide

**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.



Current Client Details

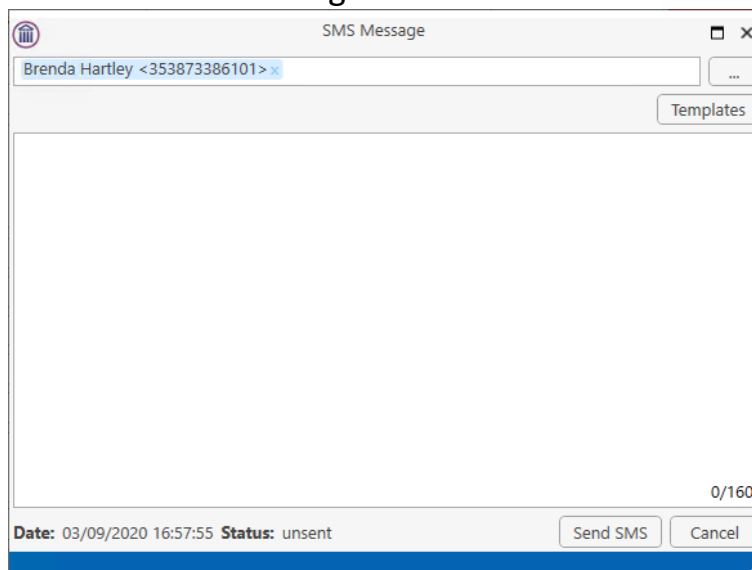
Code: HAR003 Client Name: Brenda Hartley  
Envelope Name: Enter envelope name

Corporate	Personal	Legal Details	Billing Details	Permission	Bank Details
General	Client Contacts	Notes	Matters	Cross Ref	Categories
Salutation: Brenda	Main Contact: Enter main contact	Address: IMI Campus, Sandyford, Dublin 16	Telephone: 086-9874563	Fax No: Enter fax number	Mobile: 0873386101  Opt-Out
E-Mail: brenda@keyhouse.ie	Secondary E-Mail: Enter secondary email id	Other ref: Enter other ref	PPS no: 9874563B	Fee Eamer *: Carol Nolan	Spouse PPS: Enter spouse PPS number
Client VAT no: Enter VAT number	PPS Tax type: Select PPS tax type	Postal code: Enter postal code	County: Enter county	DX Address: Enter DX Address	Nationality: Select nationality
Web Password: Enter Web Password	Warning Message: Please correspond by Email	<input checked="" type="checkbox"/> Anti money laundering checked <input type="checkbox"/> Check if this Contact is an organisation <input checked="" type="checkbox"/> Receive monthly statements			

03 Sep 2020

OK Cancel

3. Enter the SMS message and click Send SMS.



SMS Message

Brenda Hartley <353873386101> x

Templates

0/160

Date: 03/09/2020 16:57:55 Status: unsent

Send SMS Cancel



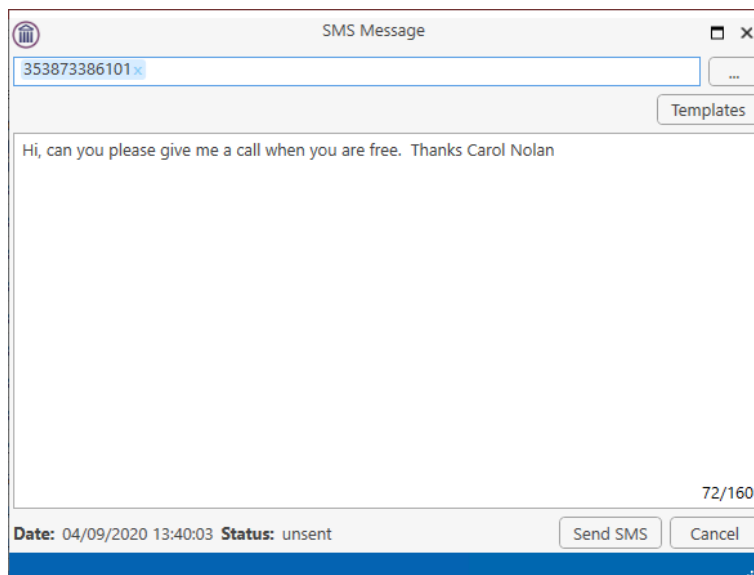
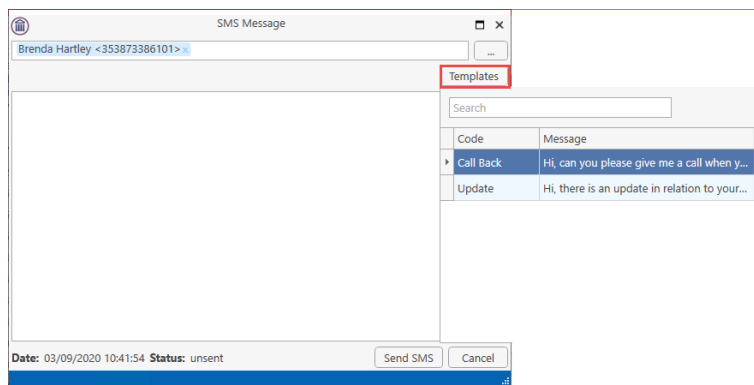
## How To Guide

**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.

## How To Guide

			12 Aug 2020	16:25	CN	Status: Delivered
---	---	--	-------------	-------	----	-------------------

- The status of the message can also be seen. The status will be one of 4 options.

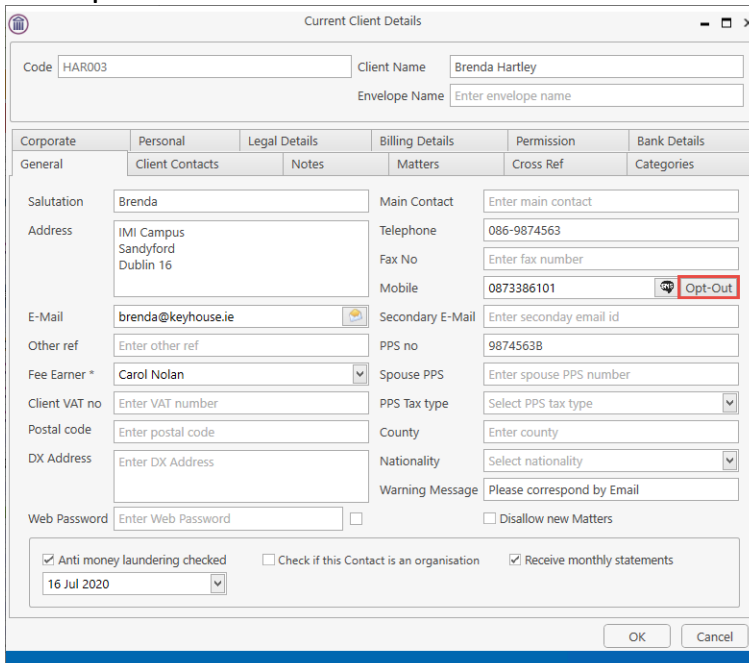
<b>Status: Unsent</b>	The message has not been sent
<b>Status: Sent</b>	The message has been sent but not yet delivered
<b>Status: Delivered</b>	The message has been delivered
<b>Status: DELIVERY FAILED</b>	The message was sent but not delivered

- 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.

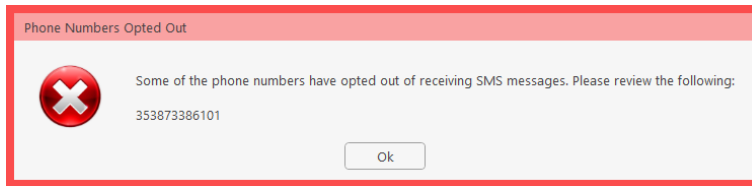
- Open the Current Client Detail or the Associate Details and click the Opt Out option beside the mobile number.



The screenshot shows a 'Current Client Details' window for 'Brenda Hartley'. The 'Mobile' field is set to '0873386101' and has an 'Opt-Out' button next to it. Other fields include 'Code: HAR003', 'Client Name: Brenda Hartley', 'Envelope Name: Enter envelope name', 'Salutation: Brenda', 'Address: IMI Campus, Sandyford, Dublin 16', 'E-Mail: brenda@keyhouse.ie', 'Telephone: 086-9874563', 'Fax No: Enter fax number', 'Secondary E-Mail: Enter secondary email id', 'PPS no: 9874563B', 'Spouse PPS: Enter spouse PPS number', 'PPS Tax type: Select PPS tax type', 'County: Enter county', 'Nationality: Select nationality', 'Warning Message: Please correspond by Email', 'Web Password: Enter Web Password', 'Disallow new Matters: [ ]', 'Anti money laundering checked: [x]', 'Check if this Contact is an organisation: [ ]', 'Receive monthly statements: [x]', and a date field set to '16 Jul 2020'.

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

## How To Guide



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