



SMS Integration

User's Guide

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SMS Integration by Logics

Description


Contacting customers is now quick and easy with Logics's SMS feature. Sending a quick SMS sometimes seems to be the most convenient way of getting in touch with your customer.

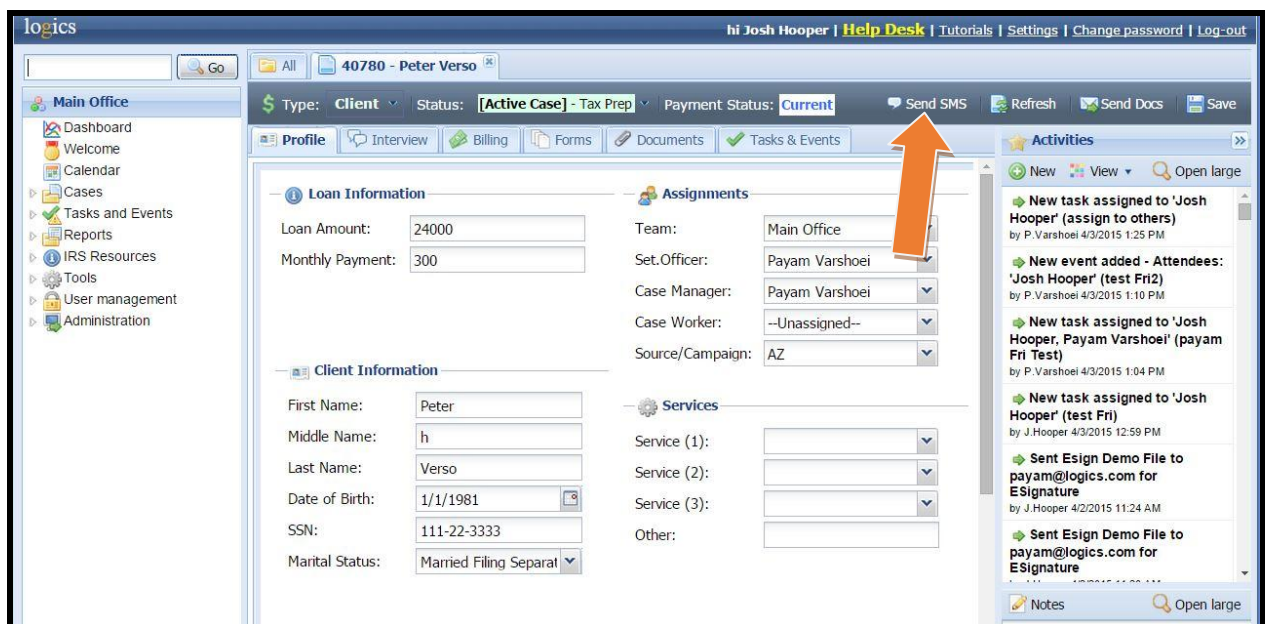
Now, you can send (160 characters per text message) SMS directly from your Logics account. Logics keeps the record of your text messages in SMS Log under Tools section, as well as in Activities bar inside each case.

How to Activate SMS feature

- Open a help desk ticket, request for activation of the SMS feature and let us know the number of SMS numbers you need for your team.
- Tell us the area code you would like to have your SMS numbers from (up to the first 6 digits.)
- You will receive the SMS numbers as the response to your ticket.
- Insert the SMS numbers in the SMS# field in the Edit User window for each user for whom you want to activate SMS feature.

How to Send SMS

- Open a case and at the top right you will see a Send SMS icon . Press the icon.



The screenshot displays the Logics software interface. At the top, the user is logged in as 'hi Josh Hooper'. The main content area shows a case for '40780 - Peter Verso' with a status of 'Active Case - Tax Prep'. The 'Send SMS' icon is highlighted with an orange arrow. The interface includes sections for Loan Information, Client Information, Assignments, and Services. The Activities panel on the right shows recent tasks and events.

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- You will see a SMS pop up at the bottom right of the window.

The screenshot displays the Logics software interface for a client named Peter Verso. The interface is divided into several sections:

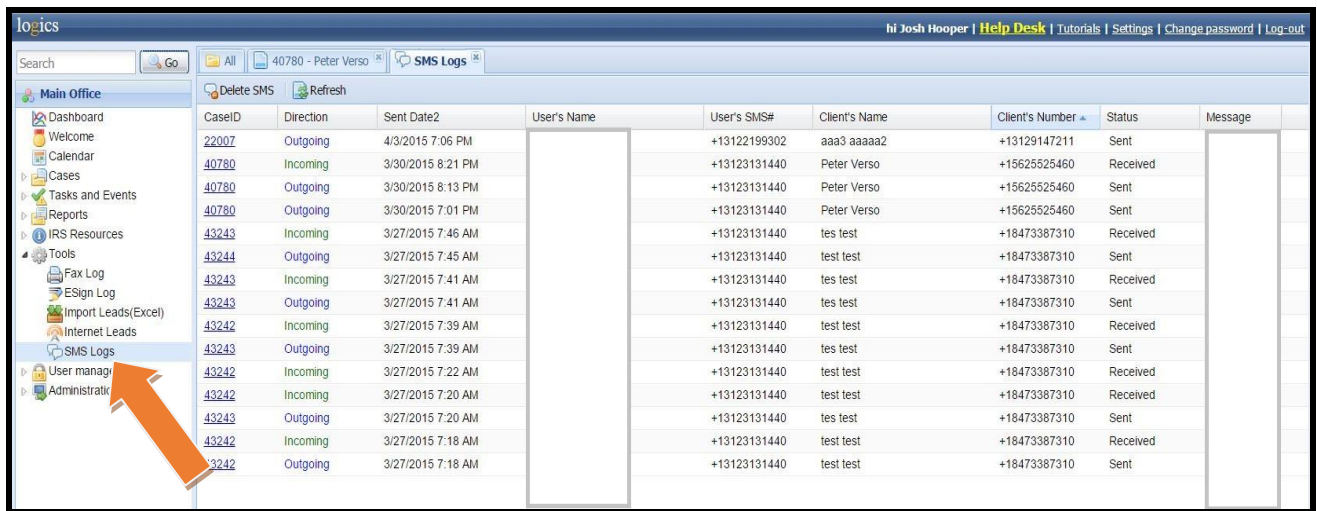
- Client Information:** First Name: Peter, Middle Name: h, Last Name: Verso, Date of Birth: 1/1/1981, SSN: 111-22-3333, Marital Status: Married Filing Separat.
- Contact:** Home #: (321)456-7895, Work #: (123)456-7894, Mobile #: (123)456-7890, Fax #: , Email: test@irslogics.com, Best Time to Call: .
- Home Address:** Street: 123 Main St., #: 456, City: Irvine, State: California, Zip Code: 92618.
- Activities:** A list of recent activities including "New task assigned to 'Josh Hooper' (assign to others)", "New event added - Attendees: 'Josh Hooper' (test Fri2)", "New task assigned to 'Josh Hooper, Payam Varshoei' (payam Fri Test)", "New task assigned to 'Josh Hooper' (test Fri)", "Sent Esign Demo File to payam@logics.com for ESignature", and "Sent Esign Demo File to payam@logics.com for ESignature".

An orange arrow points from the Home Address field to a pop-up window at the bottom right. The pop-up window, titled "Peter Verso", shows a text message being sent to the phone number +13214567895. The message content is: "Hello Peter! Hope all is well. Just wanted to give you an update regarding your OIC".

- Type your message. Shift+ Enter for moving to the next line. Press enter to send.
- Read the message carefully before you press enter, as it sends the message right away.
- After sending the message an activity will be logged in Activities bar in the right hand side of the case page.

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- You can also see a log of all of your text messages (and other users' messages if you have the permission) in SMS Log under Tools.



The screenshot shows the Logics software interface. The top navigation bar includes the user name 'hi Josh Hooper', a 'Help Desk' link, and other utility links. The left sidebar contains a 'Main Office' menu with various options, including 'SMS Logs' which is highlighted by an orange arrow. The main content area displays a table of SMS transactions.

CaseID	Direction	Sent Date2	User's Name	User's SMS#	Client's Name	Client's Number	Status	Message
22007	Outgoing	4/3/2015 7:06 PM		+13122199302	aaa3 aaaaa2	+13129147211	Sent	
40780	Incoming	3/30/2015 8:21 PM		+13123131440	Peter Verso	+15625525460	Received	
40780	Outgoing	3/30/2015 8:13 PM		+13123131440	Peter Verso	+15625525460	Sent	
40780	Outgoing	3/30/2015 7:01 PM		+13123131440	Peter Verso	+15625525460	Sent	
43243	Incoming	3/27/2015 7:46 AM		+13123131440	tes test	+18473387310	Received	
43244	Outgoing	3/27/2015 7:45 AM		+13123131440	test test	+18473387310	Sent	
43243	Incoming	3/27/2015 7:41 AM		+13123131440	tes test	+18473387310	Received	
43243	Outgoing	3/27/2015 7:41 AM		+13123131440	tes test	+18473387310	Sent	
43242	Incoming	3/27/2015 7:39 AM		+13123131440	test test	+18473387310	Received	
43243	Outgoing	3/27/2015 7:39 AM		+13123131440	tes test	+18473387310	Sent	
43242	Incoming	3/27/2015 7:22 AM		+13123131440	test test	+18473387310	Received	
43242	Incoming	3/27/2015 7:20 AM		+13123131440	test test	+18473387310	Received	
43243	Outgoing	3/27/2015 7:20 AM		+13123131440	tes test	+18473387310	Sent	
43242	Incoming	3/27/2015 7:18 AM		+13123131440	test test	+18473387310	Received	
43242	Outgoing	3/27/2015 7:18 AM		+13123131440	test test	+18473387310	Sent	

- When your client responds to your text message, you will receive the response message in your email. The response message will be logged in the Activities bar, as well as in the SMS Log as an Incoming SMS transaction.