

Using SMS in TrialWorks

Version 11 and higher

PREREQUISITES

iMESSAGE

If your work email address (the one you use in TrialWorks) is set up in Apple iMessage to send/receive messages, you need to set up an alias to send SMS messages from TrialWorks.

OFFICE 365

Microsoft does not allow users to send emails as an alias. Instead, you can set up a Distribution Group for each user and give them Send As permissions to allow them to send emails to that group.

1. Log in to Office 365 [Admin Portal](#).
2. Click the Admin centers drop-down menu and click Exchange to open the Exchange Admin Center.
3. Click Recipients on the left, then click groups from the top menu.
4. Click the + button and choose Distribution group.
5. Type Display name. This will be the name shown in the Outlook Global Address Book.
6. Type Alias. This is used to generate the email address.
7. (Optional) Change email address to desired alias address.
8. Set Owner. Can leave admin user or set to another user.
9. Add Members. These will be the users that receive emails sent to this group.
10. Click Save when finished.
11. Double click newly created group.
12. Click delivery management. Make sure Sends inside and outside my organization is selected to allow anyone to send emails to this group.
13. Click group delegation. Click the + under Send As and add users who will send emails as this group.
14. Click Save when finished.

GOOGLE APPS

1. Log in to Google Apps [Admin Console](#).
2. Click Users.
3. Click the user you want to edit.
4. Click Account.
5. Under Aliases, click Add an alias and type in new email alias.
6. Click Save when finished.
7. Log in to [Gmail](#).
8. Click the Gear icon, then Settings.
9. Click Accounts along the top.
10. Under Send mail as click Add another email address.
11. Type in Name for the alias as well as the alias email address.

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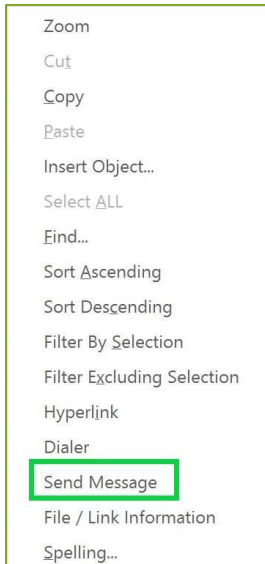
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12. Click Next Step when finished.
13. Under When replying to a message, choose Reply from the same address the message was sent to.

SENDING SMS



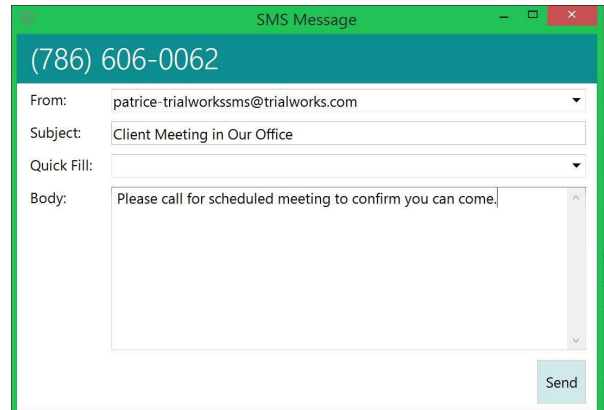
Right-click any cell phone number in TrialWorks and choose to Send Message at the bottom of the menu. You must have a contact with a cell phone number to utilize the Text Messaging feature.

The SMS window appears. The From email address automatically populates with the email address entered for your user under Admin Tools > Edit User.

If you followed the above procedure due to iMessage, you could type in the alias email address you set up before. The email address is added to the drop-down and appears the next time the window is opened.

Enter a Subject (optional) and Body and click Send.

Most Recipients do not have the subject turned on in text messaging so write the significant details into the Body of the Message Box.



FILING SMS MESSAGES

Sent

After sending an SMS message, the message is automatically filed into the case's Email tab.

On the Email tab, the TO phone number is replaced with the SaveAs of the Contact with that phone number. The Category is automatically set to SMS.

Received

When the contact replies to the SMS, you receive it in the form of an email in your Outlook Inbox. Once you click on the email reply, the phone number is replaced with the Contact's SaveAs, matched based on the phone number. The subject is also updated to the subject of the last SMS that you sent to this person.

Received replies can be filed like other emails. The Auto Matched Cases section of the Add-In case list will match the phone number to a contact in your TrialWorks database, then show the case(s) that contact is in. If no Category is selected in the Add-In, the SMS category will automatically be set.

