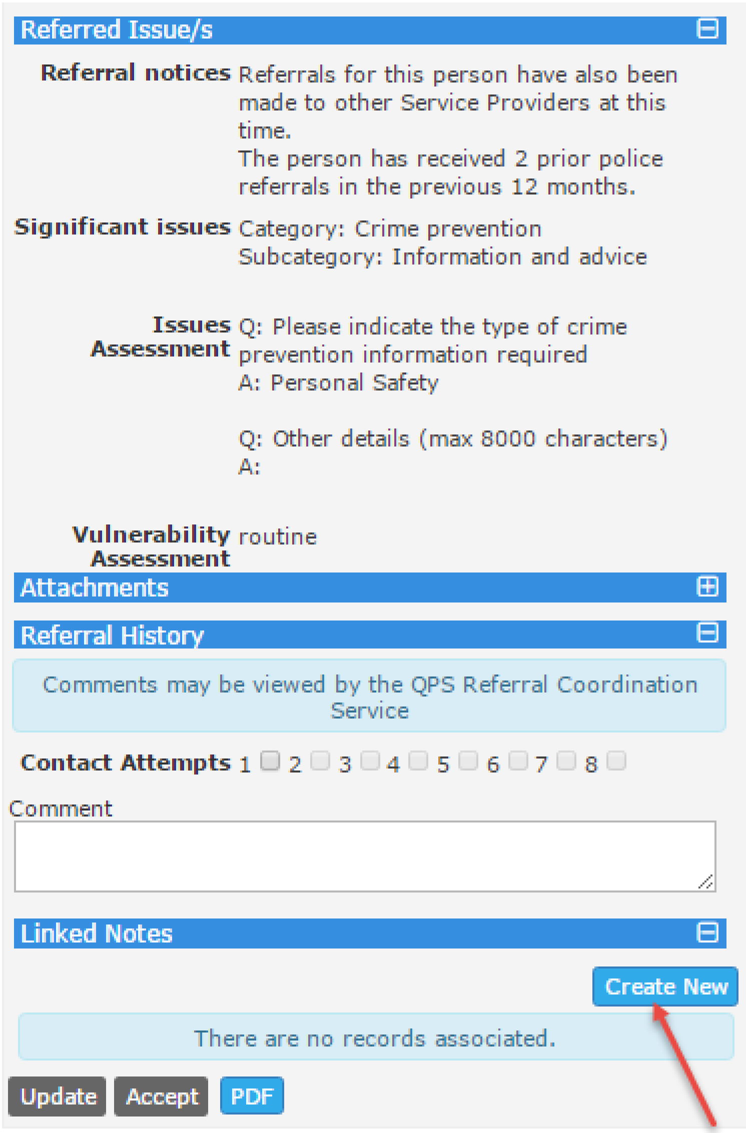
SENDING CLIENTS EMAILS / SMS DIRECTLY FROM THE REFERRAL

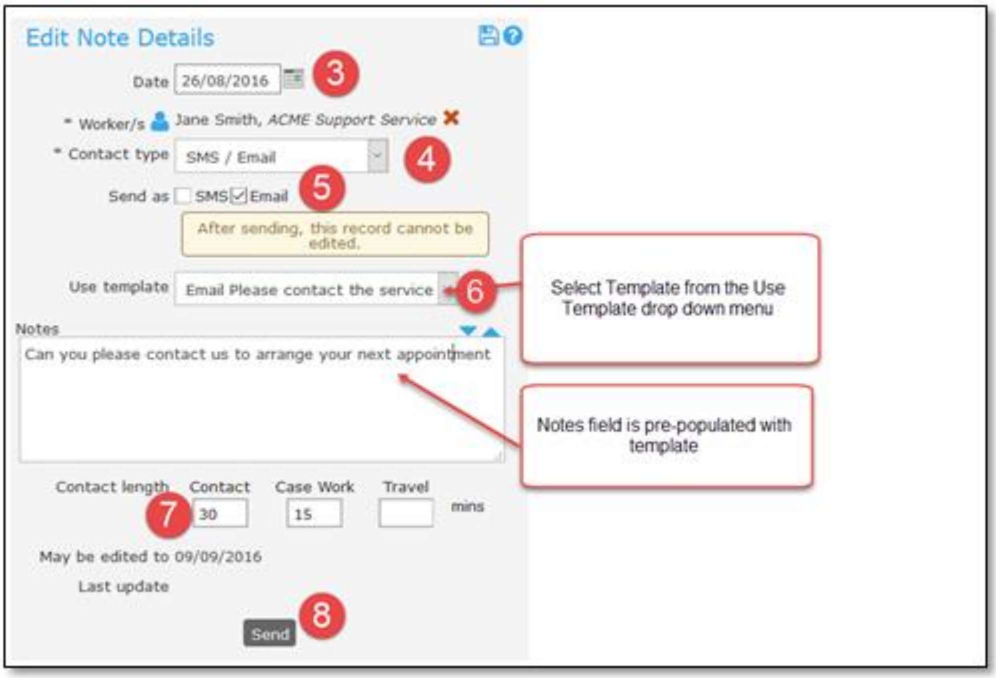
Once a client has been added into SRS database, the service provider can send an SMS or email directly from the Referral (viewed in the **Home** page). A message may be freetext or pre-designed and saved as a Template. If sending via SMS, there is a maximum character allowance of 160.

1. From the person's referral go to the **Linked Notes** section at the bottom of the Referral.Click on the plus symbol and a **Create New** option will appear:



2. Select **Create New** to open the Note template.
3. Select **Contact Type** from the drop down menu
4. If **Contact Type**, SMS Email is selected the option to send via either Email or SMS is available.
5. Tick the Send as SMS or Email Box.
6. Select the appropriate presaved Template if appropriate OR create message in **Notes** into the notes field.

7. Add contact length if appropriate/
8. Select **Send.**



- Templates can be created within SRS which can be used when selecting SMS/Email or standard note types. To create template, go to ADMIN – TEMPLATES or see **Section 14 of How To Guide.** If sending via SMS, there is a maximum character allowance of 160.

- If there is no **econtact** recorded in the client details section, a message will appear as follows – 'T*o send reminders, set a mobile phone number or email address as preferred option for text communication in Person Details'*. For details in updating Person Details / econtacts, please refer to the How To Guide.