

Lynx SMS

Revision 3.0

August 2023



1 Lynx SMS Facilities

Lynx provides facilities to enable you to send SMS messages to customers, suppliers and staff. This is done using a paid third-party service called The SMS Works. To use Lynx SMS services, you will need to have an account with them.

Since the account information has been configured into Lynx, you will be able to send SMS messages to Customers, Leads and Suppliers. Typically, you will do this by using the 'SMS' button on the Action Bar of many Lynx enquiry screens. You can also use the SMS button at the top of your home page to send an ad-hoc message to a staff member or any UK mobile phone number.

Lynx can also receive inbound SMS messages via the SMS Works' reply number facilities. Received messages are automatically matched with your Lynx records where possible and the inbound SMS manager program lets you keep track of messages received and mark them off as actioned when you have responded or dealt with them.

2 SMS Works Outbound SMS Setup

2.1.1 SMS Works Account Information

You will first need to set up an account at <https://thesmsworks.co.uk>. Please follow the account set up instructions provided there. Your new account will include 50 initial texts for free, after which you will need to purchase credits from them.

Once your account has been created, and you are logged in, you can go to the 'My Account' page, then select the 'API Key' tab. You will see a blue 'New Key/Secret' button, which you need to click to obtain your customer ID, key and 'secret' codes.

Cut and paste these codes into the SMSWORKS_CUSTOMERID, SMSWORKS_KEY and SMSWORKS_SECRET fields in the System Configuration screen, on the Email/SMS tab. Don't include the " characters.

You also need to set the SMS_PROVIDER field to 'smsworks' to tell Lynx which SMS service to use and the SMS_TAG field to the sender you would like your recipients to see when they receive messages. This can be a mobile number or your company name (to a maximum 11 characters).

It should look something like this when you are done:

SMS_PROVIDER	smsworks
SMS_TAG	Lynx Demo
SMSWORKS_CUSTOMERID	add8-793d-256e-4fe0-827f-ff08e4ce
SMSWORKS_KEY	9dc0ec3b-8b1d-40e9-af3a-cbabef01033f
SMSWORKS_SECRET	94a92c62df0354baa541520ad46096be608065d590498a1e8edcc2c49dec4ebc

Please **submit** these changes, then return to the Email/SMS tab.

Finally, click on the "Set SMSworks Token" button to create a new secret token that Lynx will store in its database to authenticate requests made to SMS Works to send messages.



3 Inbound SMS Messages

To receive SMS messages, you will need to have a Reply Number created on your SMS Works account. This can take a day or two to set up, and it comes with an additional charge, currently £13.50 plus VAT per month, billed quarterly.

Please follow the instructions on the SMS Works site to create your reply number. Once it has been created, you will need to configure it as follows:

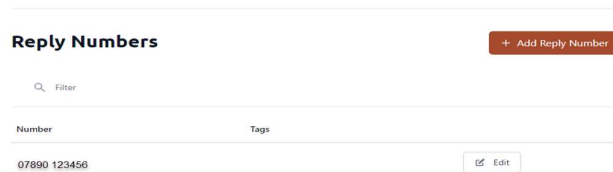
- i) Open the Lynx System Config program (Admin->System Config from the Lynx menu) and select the Email/SMS tab. At the bottom of the tab you will see a message with a URL similar to the one below:

Your SMS Works Webhook address is:

https://lynx.cloud/lynxsmsin/smsreceived.cfm?system=mylynx&smsworks_key=31df56fc-29f1-4c3e-9359-c612fdf26450

Copy the URL to your clipboard by highlighting it in your browser with the mouse and clicking 'Ctrl-C'

- ii) Set the value of the 'SMS_TAG' field to your SMS Works **reply number**. This is important as without it, the recipient of any messages from Lynx will not be able to reply to them. Note that this means you will not be able to use a 'friendly' tag like 'MyWindows Ltd' and that it may be a good idea to include your company name in any messages sent so it is clear to the recipient whom they have come from if they don't have your reply number set up in their phone contacts (which will typically be the case for an initial message).
- iii) Select Reply Numbers from the SMS Works menu and click 'Edit' on the list next to the number you want to set up for Lynx inbound messages.





- iv) Paste the URL into the 'Webhook' field in the SMS Works form and click 'Update'. This tells the SMS Works where to send details of the messages received to your reply number and allows Lynx to store the information and process it. You are now ready to send your first message to your reply number and Lynx will start processing inbound messages immediately.

Edit reply number: 07890 123456
Specify either the email address OR the webhook URL to which we will forward your incoming SMS.

Forwarding email address
The email address to forward each incoming message to

Webhook
The URL to forward each incoming message to

Webhook username
Optional. We support the inclusion of an 'Authorization' header in the POST to your webhook. The webhook username and password are base64 encoded.

Webhook password

Reply number tags (optional)
Tags specified here will stored on each outbound message when you use this reply number as the sender, and will be added to each forwarded incoming message

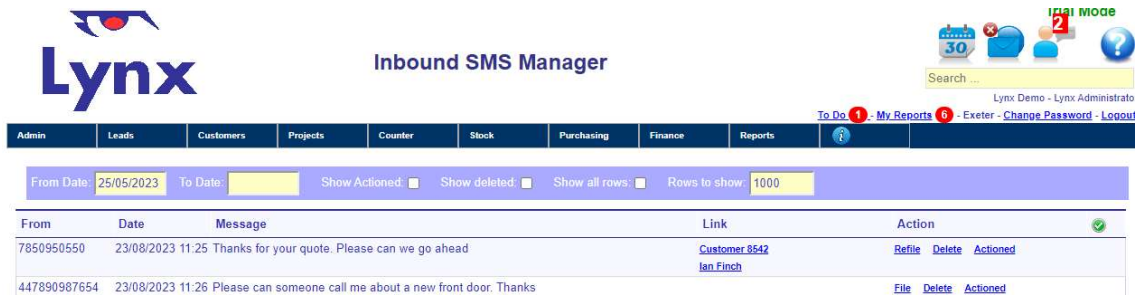
4 The SMS Manager

When SMS messages are received into Lynx, they will be stored and then matched against the database. You will also see a rec counter appearing at the top of the screen by the Ad-hoc SMS button, showing you the number of SMS messages received that have not been actioned or deleted. You can then deal with these in the SMS manager program.



To access the SMS Manager, either click on the red counter number, or else use the Lynx menu (Admin->SMS Manager).

The SMS manager will present you a list of SMS messages received with their date/time of receipt and messenger content and show you when Lynx has been able to match the message to an existing record on your database. Matching is done in the following order – Customers, Leads, Suppliers, Contacts. Where a match is made to a Contact, the SMS is linked back to the record the Contact itself goes with, which could be for example a Project. The default date range shown is the last three months, but you can set it to any date range for received messages that you wish, and you can specify how many messages you want to display as a maximum.



Lynx Inbound SMS Manager

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From	Date	Message	Link	Action
7850950550	23/08/2023 11:25	Thanks for your quote. Please can we go ahead	Customer 8542 Ian Finch	Refile Delete Actioned
447890987654	23/08/2023 11:26	Please can someone call me about a new front door. Thanks		File Delete Actioned

You can use the link shown in the 'Link' column to go to the associated record and the links in the 'Action' column to update the status of the SMS as follows:

- i) File – Allows you to search for a Lynx record (e.g. customer) to match file the SMS with
- ii) Refile – Allows you to change a previous automatic or manual link to a Lynx record
- iii) Actioned – Allows you to mark an SMS as having been dealt with. It will then disappear from the display unless the 'Show Actioned' box is ticked.
- iv) Pending – Reverses the effect of marking an SMS as 'Actioned'
- v) Delete – Allows you to mark an SMS as having been deleted. This will generally be used for spam messages or ones sent to the wrong number. As with Actioned messages, it will then disappear from the list unless 'Show Deleted' is selected.
- vi) Undelete – Reverses the effect of deleting a message

As a messages is associated with another Lynx record such as a customer, a note is created against that record with a category of 'SMS'. This allows you to see the history of messages exchanged (even if actioned) on the 'Top notes' section or on the Notes tab of the associated enquiry program.