



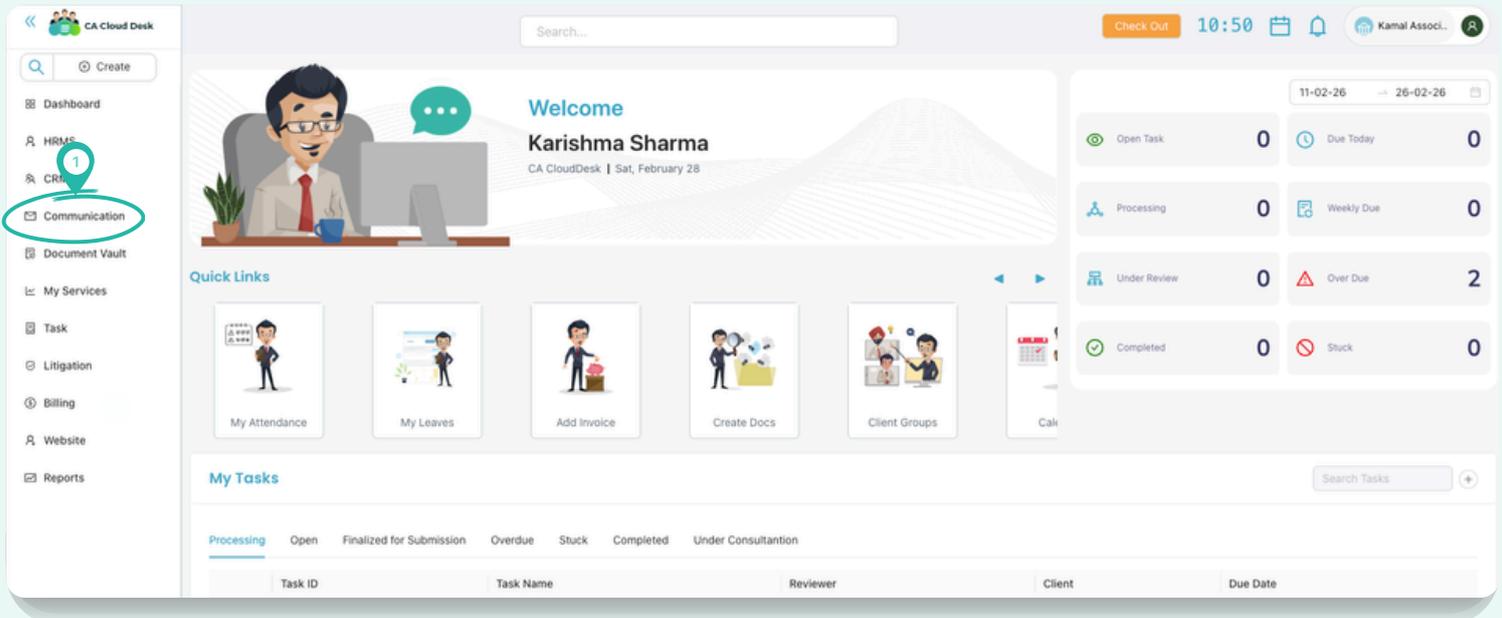
SMS

CA CloudDesk



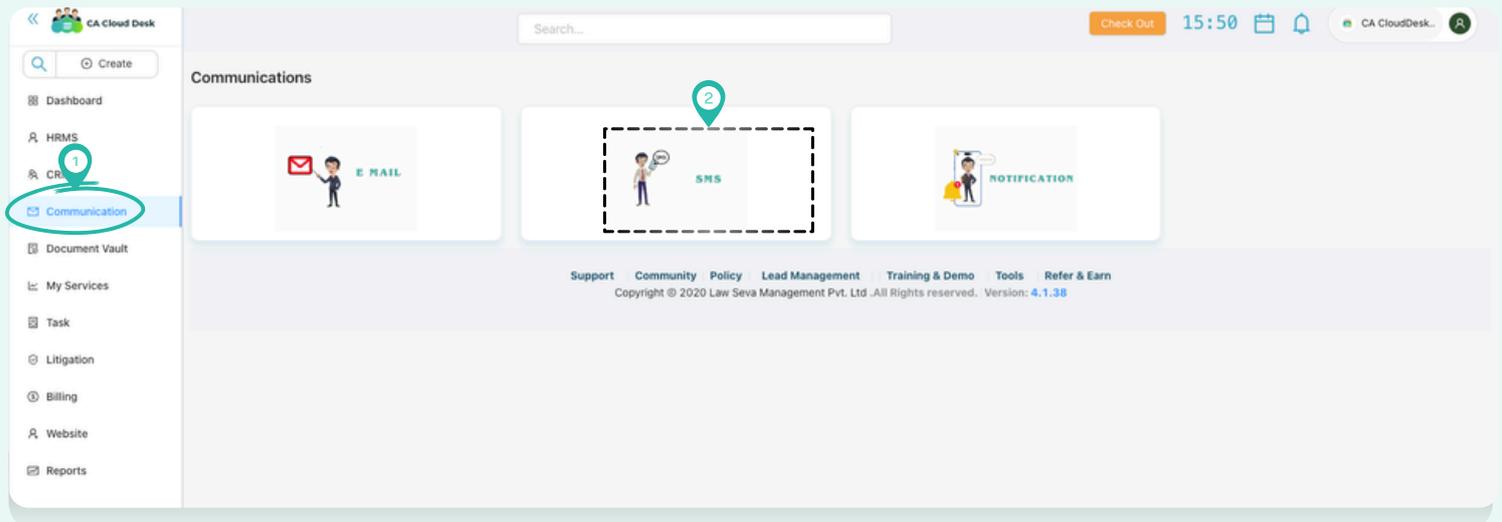
Step 1: Login and open Communication.

1. Login to your CA Cloud Desk account.
2. From the left panel on the dashboard, click **Communication**.
3. Select SMS.



The screenshot shows the CA CloudDesk dashboard for user Karishma Sharma. The left sidebar contains a menu with 'Communication' highlighted by a red circle and a green callout bubble containing the number '1'. The main dashboard area includes a 'Welcome' message, 'Quick Links' for My Attendance, My Leaves, Add Invoice, Create Docs, and Client Groups, and a 'My Tasks' section with a table of task statuses.

Task ID	Task Name	Reviewer	Client	Due Date

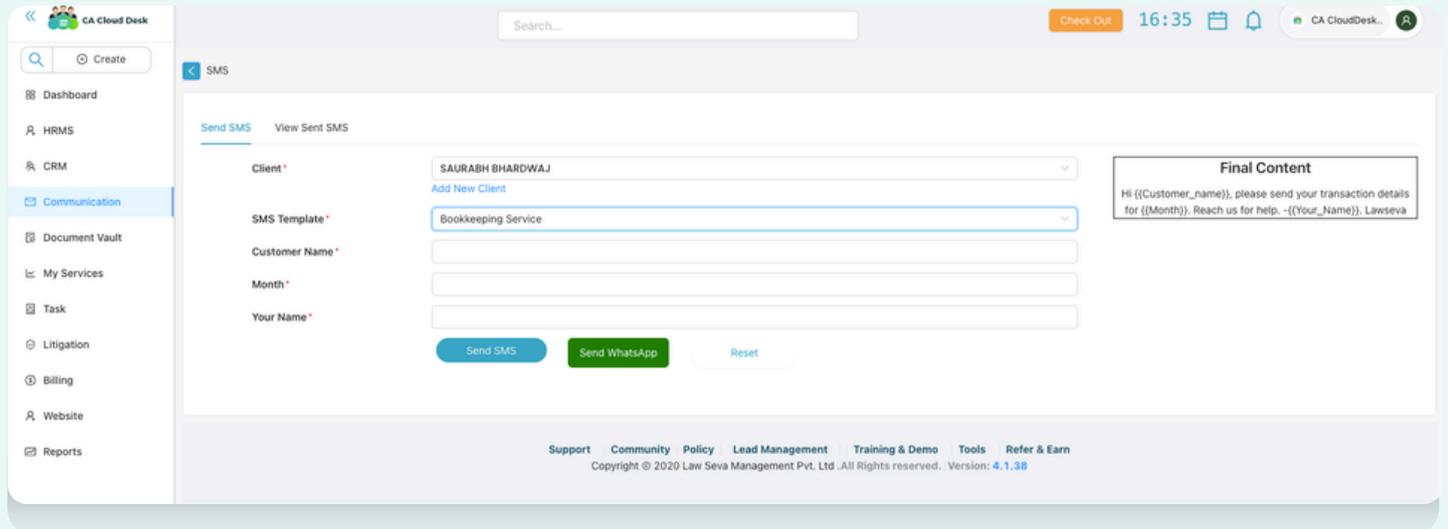


The screenshot shows the 'Communications' page in CA CloudDesk. The 'Communication' menu item in the sidebar is still circled in red. The main content area displays three communication options: E MAIL, SMS (which is circled in red with a green callout bubble containing the number '2'), and NOTIFICATION. The footer contains links for Support, Community, Policy, Lead Management, Training & Demo, Tools, and Refer & Earn, along with copyright information for Law Seva Management Pvt. Ltd.



Step 2: Select SMS

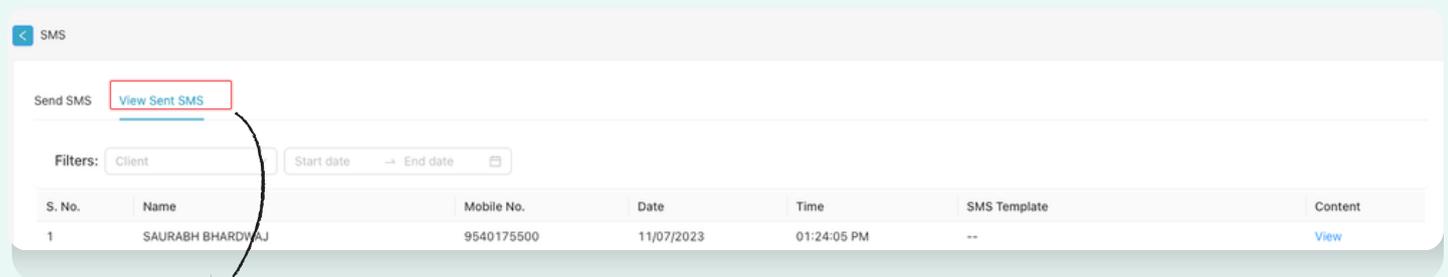
From Communication Module, Select the client. If the client does not exist, add a new client first. Then select the SMS template you want to send. You can choose to send it via WhatsApp as well.



The screenshot shows the 'Send SMS' interface in the CA CloudDesk application. The left sidebar contains navigation options: Dashboard, HRMS, CRM, Communication (highlighted), Document Vault, My Services, Task, Litigation, Billing, Website, and Reports. The main content area is titled 'SMS' and has two tabs: 'Send SMS' (active) and 'View Sent SMS'. The 'Send SMS' form includes the following fields and options:

- Client ***: A dropdown menu with 'SAURABH BHARDWAJ' selected and a link for 'Add New Client'.
- SMS Template ***: A dropdown menu with 'Bookkeeping Service' selected.
- Customer Name ***: An empty text input field.
- Month ***: An empty text input field.
- Your Name ***: An empty text input field.

Below the form are three buttons: 'Send SMS' (blue), 'Send WhatsApp' (green), and 'Reset' (grey). To the right of the form is a 'Final Content' preview box containing the text: 'Hi {{Customer_name}}, please send your transaction details for {{Month}}. Reach us for help. -{{Your_Name}}. Lawseva'. At the bottom of the interface, there is a footer with links for Support, Community, Policy, Lead Management, Training & Demo, Tools, and Refer & Earn, along with copyright information for Law Seva Management Pvt. Ltd. and version 4.1.38.



The screenshot shows the 'View Sent SMS' interface. At the top, there are two tabs: 'Send SMS' and 'View Sent SMS' (active). Below the tabs are filter options: 'Filters: Client' (with a dropdown) and 'Start date → End date' (with a date range selector). Below the filters is a table displaying the sent SMS messages.

S. No.	Name	Mobile No.	Date	Time	SMS Template	Content
1	SAURABH BHARDWAJ	9540175500	11/07/2023	01:24:05 PM	--	View

[View Sent SMS](#)

All sent SMS messages will be displayed here by using Filters of client and date you can view all the sent SMS.