

SMS Administration

24/10/2024 12:30 pm BST

Summary

SMS messaging is used within the system to communicate with clients in the following areas: Diary, Appointment Reminders, Patient Reminders, Compliance Reminders, Reception and Report Wizard.

Details

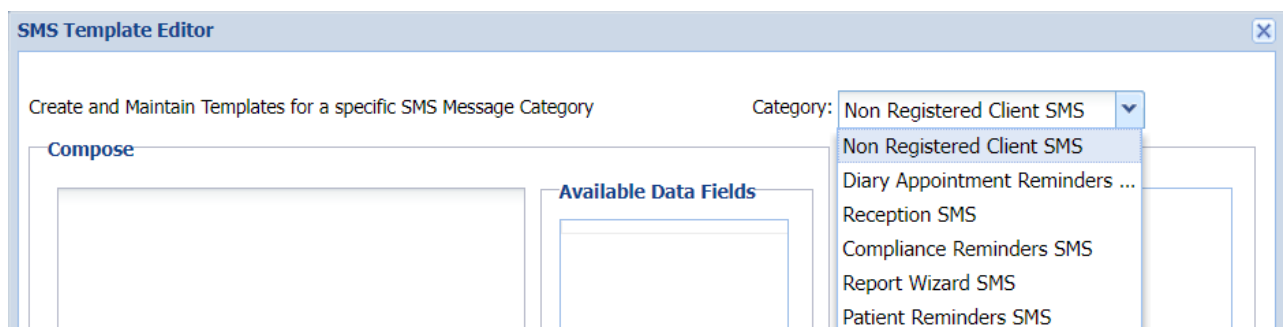
Email and SMS messaging are an additional add-on to Merlin. For more information please contact your RCM or use our the Support Ticket System via Merlin.

SMS Templates

An SMS Template allows pre-written messages to be sent to clients on an individual basis or as a group. Creating templates speeds up the SMS process and allows for accurate spelling and grammar which may be overlooked in a rapidly typed message.

Adding an SMS Template

1. Open the SMS Template Editor (**Administration > SMS Messaging > SMS Templates**).
2. Select the relevant area from the **Category** drop down box.



The screenshot shows the 'SMS Template Editor' window. At the top, it says 'Create and Maintain Templates for a specific SMS Message Category'. On the right, there is a 'Category:' dropdown menu. The dropdown is open, showing a list of categories: 'Non Registered Client SMS' (selected), 'Non Registered Client SMS', 'Diary Appointment Reminders ...', 'Reception SMS', 'Compliance Reminders SMS', 'Report Wizard SMS', and 'Patient Reminders SMS'. On the left side of the editor, there is a 'Compose' text box. On the right side, there is an 'Available Data Fields' section with a list of fields.

3. Once selected, use the 'Compose' text box on the left hand side to **create your message** along with the 'Available Data Fields'.

Compose

Hi \${Title} \${Surname} , \${AnimalName} is now due their \${Description} on \${CV_Date}.

Please call us on 123456789 to get booked in.

Available Data Fields

RecallId
ContactId
AnimalId

'Available Data Fields' can be used to personalise each SMS message. For example, sending SMS messages to two clients: 'Mr Phillips' and 'Mrs Jenkins,' using:

"Hi \${Title} \${Surname}", will send the following to the clients:

Message 1: "Hi Mr Phillips"

Message 2: " Hi Mrs Jenkins".

- Select '**Save as New**' and the template will be added to the 'Existing Templates' list. Please note the 160 character limit for 1 SMS message.

SMS Template Editor

Create and Maintain Templates for a specific SMS Message Category

Category: Patient Reminders SMS

Compose

Hi \${Title} \${Surname} , \${AnimalName} is now due their \${Description} on \${CV_Date}.

Please call us on 123456789 to get booked in.

Available Data Fields

RecallId
ContactId
AnimalId
LV_Date
CV_Date
StartDate
EndDate
Description
TreatmentItemId
RecallLength
RecallPeriod
EnteredOn
TypeName
TypeDescription
WorkSite
ClientSite

Add Field

Existing Templates

Hi \${Title} \${Surname} , \${AnimalName} is 123456789 to get booked in.

\${AnimalName} is now due their booster.

Number of Characters Entered: 132

Practice set limit: 611

SMS Length Information

Warning: Long SMS messages may incur multiple charges; Please use the below as a guide only to SMS standards.

A single SMS will be sent up to 160 characters.

Over 160 characters messages are split into 153 character segments. Charges apply per segment.

The following characters count as 2 characters in the SMS standard: " ^ { } [] ~ \ ? | "

Clear

Save as New

Update

Delete

Exit

Edit an SMS Template

- Select the relevant Category via the drop-down list.

2. Select a template from the '**Existing Templates**' list.
3. The text will load into the top left text box.
4. **Edit the text/Data Fields** as required.
5. Select '**Update**' and this will overwrite the previous text template.

Delete an SMS Template

1. Select the relevant Category via the drop-down list.
2. Select a template from the '**Existing Templates**' list.
3. The text will load into the top left text box.
4. Select '**Delete**' and this will permanently delete the template.

Please note - If this template is in use on an Automatic Scheduler, you will need to remove this as the first step, and then delete from the SMS Template Editor window.

Review Messages Sent



The 'Review Messages Sent' menu is accessed via (**Administration > SMS Messaging > Review Messages Sent**). This screen displays all sent SMS messages with their delivery status (sent/not sent) for the dates specified.

Note: Due to the number of SMS text messages sent through, the delivery status may take up to 72 hours to show as received.

Please allow 3 days for the system to update and review the success rate of sent messages.

Viewing Messages Sent

1. Navigate to (**Administration > SMS Messaging > Review Messages Sent.**)
2. Specify the dates you wish to view.

Start Date:	08/09/2024	End Date:	14/09/2024			
Date Sent	Site	Sent To	Message	Status	✓ Delivered	

A list will display of all SMS messages sent between the date range and include details of who they were sent to, the contents of the message and if the delivery was successful.