

Appointment Reminders Automatic Schedule

23/10/2024 12:40 pm BST

Summary

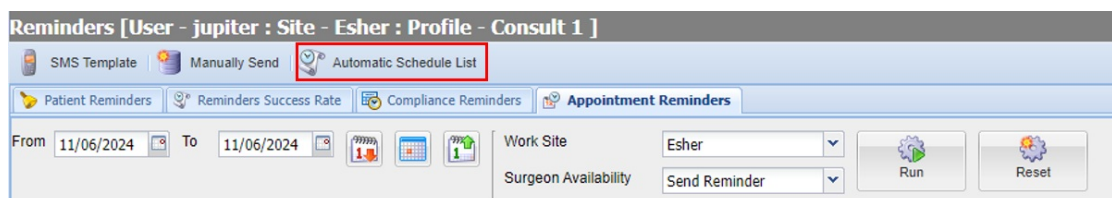
Appointment Reminders can be setup to send out on an automated schedule. The Appointment Reminder Scheduler allows you to send SMS and Email reminders to clients regarding their appointments via an automated scheduled task.

Details

Using the Appointment Reminder Scheduler

The Appointment Reminder Scheduler can be accessed via the Reminders screen.

1. Select Reminders from **Utilities > Reminders**.
2. Select the '**Appointment Reminders**' tab.
3. Select the '**Automatic Schedule List**' button.



4. The '**Appointment Reminder Schedule List**' window will display.

Create an Appointment Reminder Scheduled Task

1. Open the The '**Appointment Reminder Schedule List**' window.
2. Select '**Add**' from the right-hand side menu and the '**Create/Edit Schedule**' window will display.
3. Enter a **Schedule Name** for your scheduled task.
4. Enter your **schedule details**.

Create / Edit Schedule

Schedule Name


Send Reminder at starting on

for reminders due between the next and day(s)

and match the following filtered criteria.

Work Site	<input type="text" value="Esher"/>	Client Category	<input type="text" value="[All]"/>
Client Site	<input type="text" value="[All]"/>	Patient Category	<input type="text" value=""/>
Reminder Type	<input type="text" value="[All]"/>	Species	<input type="text" value="[All]"/>
Treatment Type	<input type="text" value="[All]"/>	Breed	<input type="text" value="[All]"/>


Send via SMS

☒ 

Select Template

Hello \${ClientName,} This is a polite reminder that \${Animal_Name} has an appointment on \${AppointmentDate,} Kind regards, The Vets Vet

Send via Email

☐ 

Select Template

Appointment email template.docx

Appointment Reminder

Appointment reminder.docx

SAAppointment.docx

Communication Type

1. Type in the Schedule Name.
2. Set how often you would like Merlin to send Appointment Reminders, what time they will send and also a start date.
3. **'for reminders due between the next X and X day(s)'** - This is how much notice you wish to give to clients. In the screenshot example above, an SMS and/or email will automatically send to the client 2 days before their appointment.
4. Select the Communication Channels and templates you wish to use:

Note: The mergefield {Appointment Date} also includes the appointment time.

Send via SMS = Tick the checkbox and select the [SMS Template](#) you want to use.

Send via Email = Tick the checkbox and select the [Document Template](#) you want to use.

6. Select '**Save Schedule**' to create the scheduled task.

Editing a Scheduled Task

1. Open the The '**Automatic Schedule List**' window.
2. **Select the task** you wish to edit.
3. Select '**Edit**'.
4. The Create/Edit Schedule window appears, which allows you to modify the existing task.
5. Once modified, select '**Save Schedule**'.

Deleting a Scheduled Task

1. Open the The '**Automatic Schedule List**' window.
 2. **Select the task** you wish to delete.
 3. Select '**Remove**'.
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