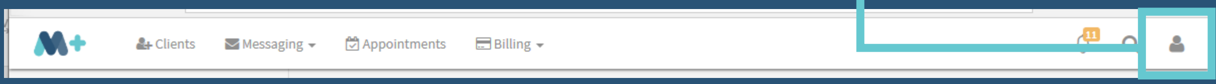
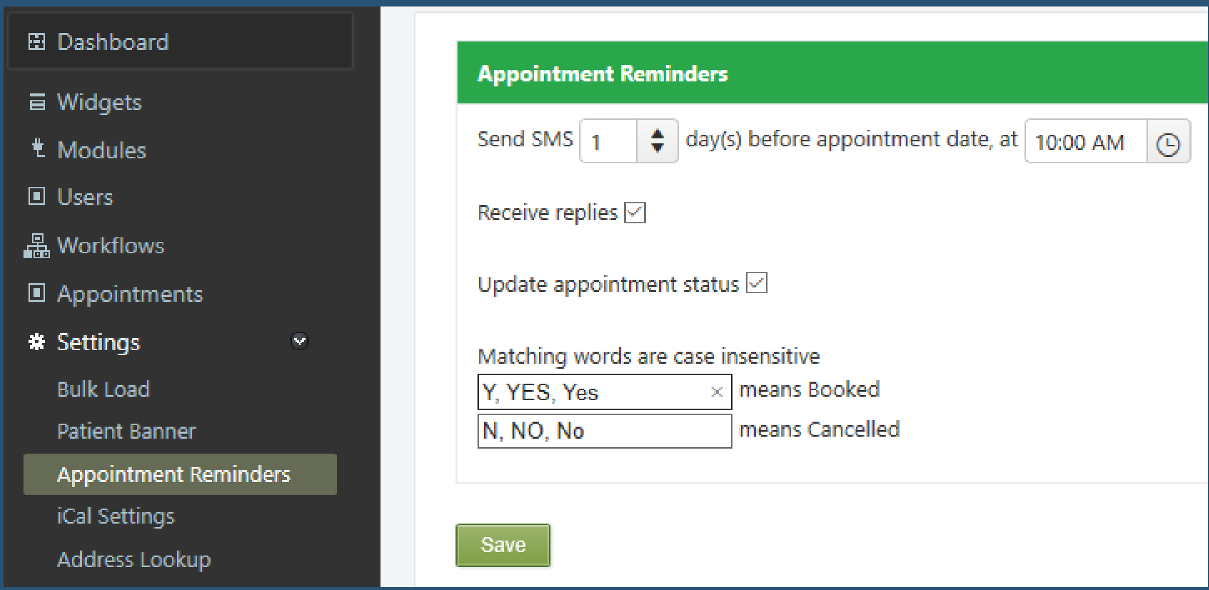
2-WAY SMS

User Guide

CONFIGURATION

1. Go to ‘Admin Configuration’
   - Click on ‘Settings’
   - Click on ‘Appointment Reminders’





2. Choose when you’d like to send the SMS appointment reminder to your client

3. Enter the appointment status responses:

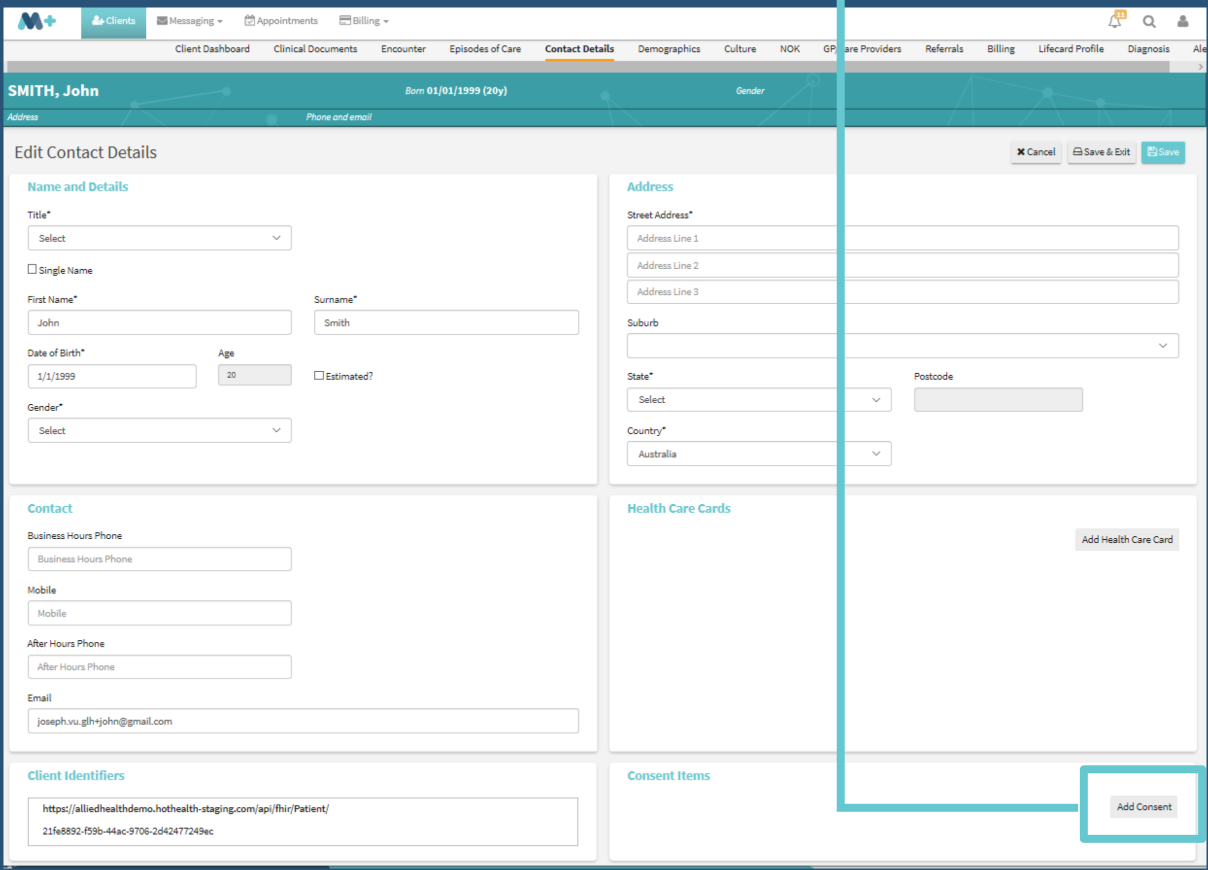
- • Yes, or Y, for booked
- • No, or N, for cancelled

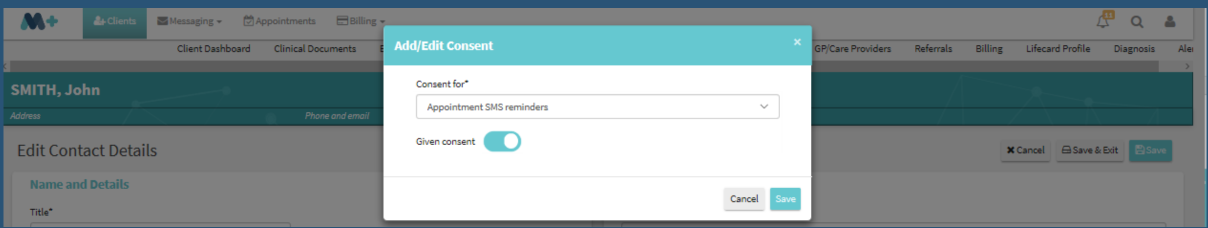
CONSENT FROM CLIENT

4. In order to send SMS reminders, you need to obtain consent from your client

   Note: the patient mobile number must be recorded for an SMS to be sent

   Update consent by selecting your client's record, and editing consent under the 'Consent' tab



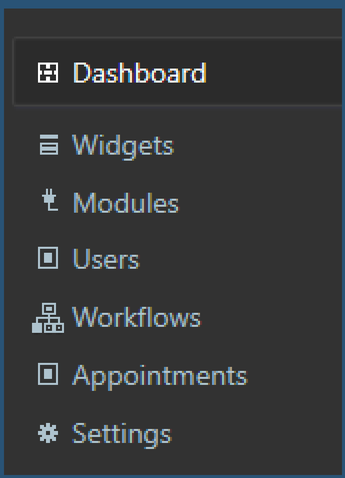


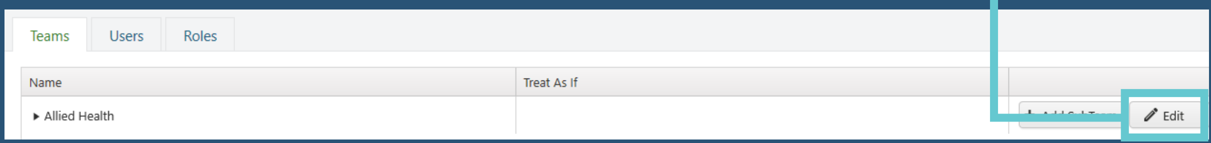
SMS SETTINGS FOR TEAMS

Different teams can have different SMS appointment settings

1. Go to 'Users', and click 'Teams'

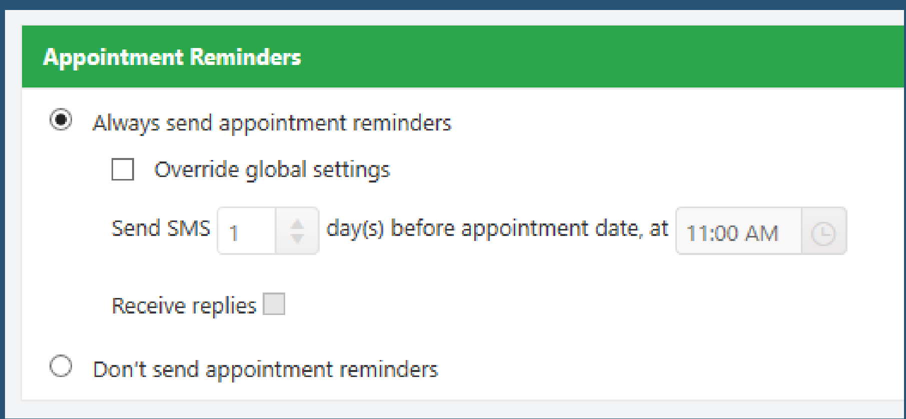
2. Select the team you wish to edit and click 'Edit'





3. Scroll to 'Appointment Reminders' and edit the chosen settings

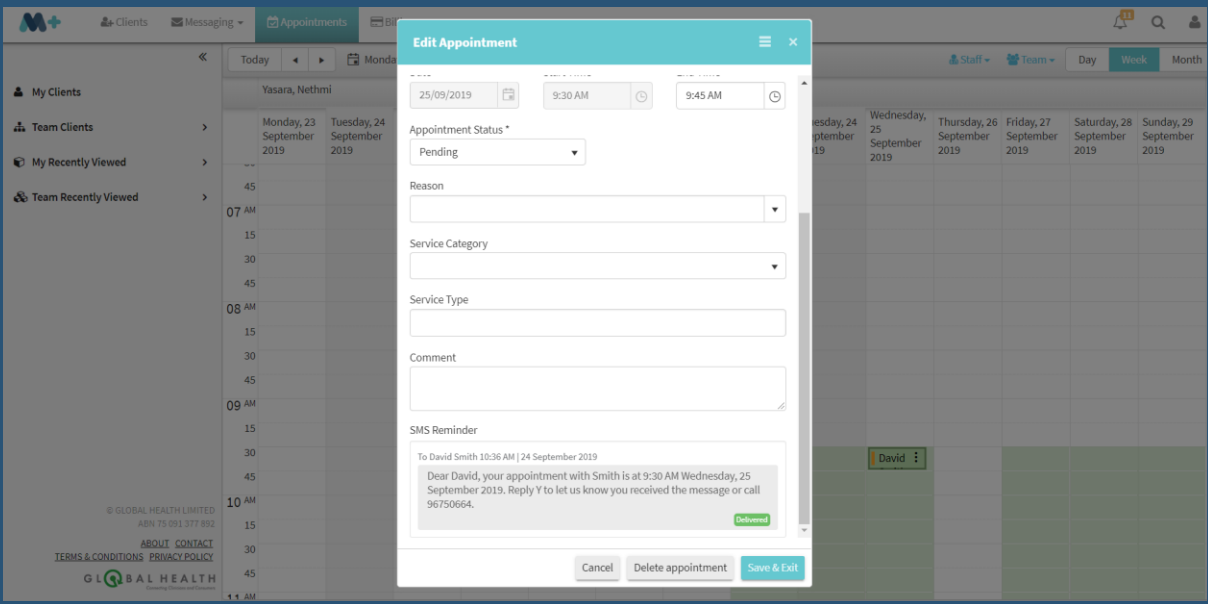
Note: There is also an option to not send appointment reminders



VIEW STATUS

1. Select an appointment via the ‘Appointments’ tab

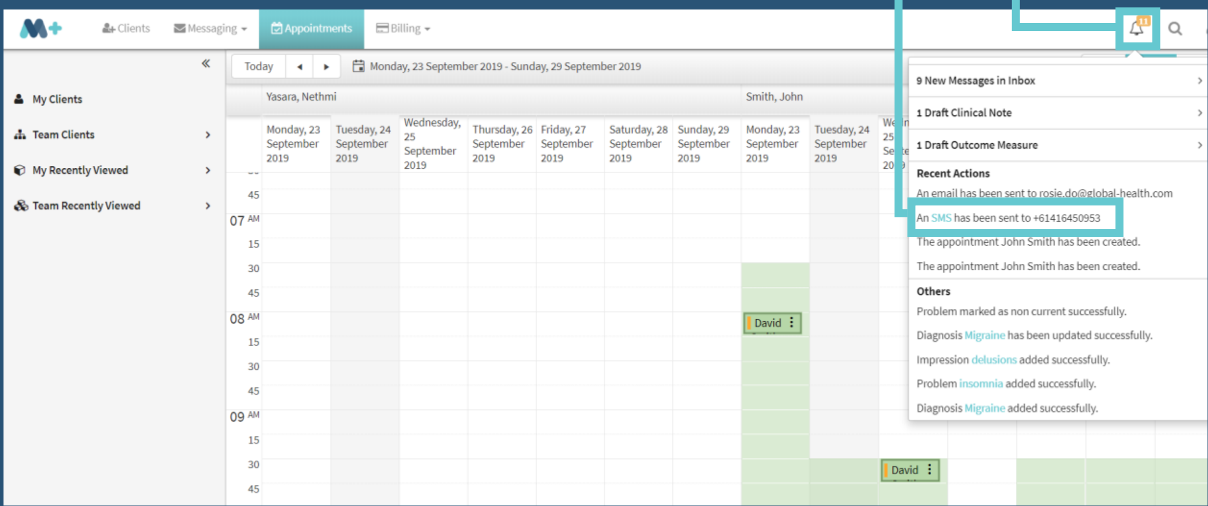
   At the bottom of the ‘Edit Appointment’ screen, you’ll be able to view the SMS status, and the client’s response



2. When a client sends a response, you will receive a notification

   Click on the bell symbol, to view notifications

3. Click on the SMS link on the notifications tab



4. You'll be able to view the SMS history between you and your client on this page

   Select the time period within which you'd like to view the SMS history, and then click 'Apply'