

# SMS/TEXT MESSAGING

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## SMS MESSAGE LENGTH

SMS messages allow a length of more than 160 characters in VetlinkPRO. Remember however that although VetlinkPRO allows more than 160 characters, the actual SMS length as set by the telco's is still 160 characters. A 200 character SMS will still be spilt by the telco's into 2 messages then joined again into one message once reaching the clients phone. Thus a 200 character message will still be charged as two SMS.

## SMS UNSUBSCRIBE

To cater for anti-spam laws VetlinkPRO will automatically unsubscribe clients from receiving SMS Mailers, Promotions and Newsletters if the client replies with the word **"STOP"**.

It is highly recommended to add a message such as **"Reply STOP to unsub"** to the end of any marketing material that is broadcast by SMS. If the client replies **"STOP"** the **Send By SMS** marketing fields under the **More** tab of the client record such as Mailers, Promotions and Newsletters will be unticked. The mobile number is still kept in case of emergencies.

If your mailout is set to only send to clients with the SMS fields ticked in the properties, then the client will not get an SMS the next time you send. If your mailout is set to send to anyone with an SMS, then the client will receive the SMS regardless of their marketing preferences. Please check your mailer properties to see what your setup is and also whether your client records currently have the SMS fields ticked.

If you have not been using the Send By fields, you can contact CFL to tick these fields for all clients in bulk so you can unsubscribe clients as they contact you. You should also check your client profiles are set up correctly so new clients are automatically ticked as well. Client profiles can be accessed from **Options | Picklists | Client | Profiles...**

## SMS SEND TIMES

The times between which SMS are sent are now available for users to change themselves. These can be edited from **Options | Setup | Misc | Internet...** SMS will only be sent between the times specified, if an SMS is sent outside those hours it will be "held" and sent the next day. The times are there to prevent clients getting SMS in the middle of the night. For example, if the internet is down the SMS will be held until the connection is up again. If that is in the middle of the night and your setup options allow SMS to be sent at that time the clients will receive the SMS.

**SMS Settings (Branch)**

☒ Use SMS / TXT Facility

Url

Username

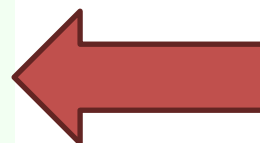
Password

SMS Check Interval (minutes)

Country Code for Replies

On Weekdays, Send SMS between  &

On Weekends, Send SMS between  &



# APPOINTMENT CONFIRMATIONS

## Setup for Sending SMS Appointment Reminders

Appointment reminders can be sent directly to all clients through VetlinkPRO via SMS in a few simple clicks of the mouse. Confirmations sent back from clients via SMS will then automatically update the appointment book to show if a client has confirmed their appointment.

The initial set up for sending SMS appointment confirmations will be done by CFL. You can however edit the default messages that are sent to clients by following the steps below.

### Editing SMS Appointment Reminder Message

This message is used for sending a single SMS when you right click on an appointment and select [Email/SMS | Appointment Reminder](#).

1. Click on the **'Options'** menu then on **'Setup'**.
2. Click on the **'Diary'** button.
3. Make sure there is a tick in the **'SMS Appointment Reminder'** check box and then click **Telemedicine** to edit the telemedicine template or **Standard** to edit the normal template.
4. The SMS template window will open. Type the message and insert any mail merge variables you need by clicking on the **'F11 Mailmerge'** button.
5. Click on the **'F12 OK'** button to save the SMS.

### Editing SMS Appointment Notification Message

This is the message that will be sent to clients when you send appointment reminders from the **'Send Appointment Notifications'** screen. These are usually sent one to two days before the appointment.

1. Click on the **'Options'** menu then on **'Setup'**.
2. Click on the **'Diary'** button.
3. In the field **'SMS/Email, if Appt is moved by [ ] hours from now'**. Choose the length of time, in hours, that must separate the original appointment time and the new appointment time before the SMS appointment notification message is sent.
4. Make sure there is a tick in the **'SMS Appointment Notification'** check box and then click **Telemedicine** to edit the telemedicine template or **Standard** to edit the normal template.
5. The SMS template window will open. Type the message and insert any mail merge variables you need by clicking on the **'F11 Mailmerge'** button.
6. Click on the **'F12 OK'** button to save the SMS.

## Editing SMS Appointment Confirmation Message

This is the message that will be sent to clients when you first create their appointment or the appointment is moved. It is also used for confirming online bookings.

1. Click on the **'Options'** menu then on **'Setup'**.
2. Click on the **'Diary'** button.
3. Make sure there is a tick in the **'SMS Appointment Confirmation'** check box and then click **Telemedicine** to edit the telemedicine template or **Standard** to edit the normal template.
4. The SMS template window will open. Type the message and insert any mail merge variables you need by clicking on the **'F11 Mailmerge'** button.
5. Click on the **'F12 OK'** button to save the SMS.

## Editing Reason Based Appointment Confirmation Messages

Appointment reminder messages can be configured based on Diary Reasons. For example your Grooming or Surgery appointment reminders may say “Hi John, Please drop Fluffy off by 8am for Surgery...”, whereas the message for other reasons may say “Hi John, Your appointment for fluffy is at 1pm on 6/8/2019...”

To configure Reason based appointment reminders go to [Options | Picklists Setup | Diary | Diary Reasons | select reason | Click the Email and SMS tab | Edit SMS or Email Appointment Reminder, Notification or Confirmation](#) as required. Click [Telemedicine](#) to edit the telemedicine template or [Standard](#) to edit the normal template.

Reasons without a message configured will still use the default message under [Options | Setup | Diary](#)

**SMS appointments to clients**

<input type="checkbox"/> SMS Appointment Reminder	<a href="#">Telemed</a>	<a href="#">Standard</a>
<input type="checkbox"/> SMS Appointment Notification	<a href="#">Telemed</a>	<a href="#">Standard</a>
<input type="checkbox"/> SMS Appointment Confirmation	<a href="#">Telemed</a>	<a href="#">Standard</a>

\* If unchecked, messages configured in diary setup will be used for Email & SMS

## Editing SMS Reply Message

The ‘[SMS Reply](#)’ is appended to the bottom of the ‘[Appointment Reminder](#)’ or ‘[Appointment Notification](#)’ message to prompt the client how to reply to the SMS.

1. Click on the ‘[Options](#)’ menu then on ‘[Setup](#)’.
2. Click on the ‘[Misc](#)’ button and then on the ‘[Internet](#)’ tab.
3. Click on ‘[Edit SMS Reply](#)’ and a SMS template will open to edit.
4. Type the message and insert any mail merge variables you need by clicking on the ‘[F11 Mailmerge](#)’ button.
5. Click on the ‘[F12 OK](#)’ button to save the message.



**TIP:** It is difficult to gauge the length of any one mail-merged variable. Therefore SMS messages should be short and to the point and allow spare characters for long client names. If the total message length exceeds 160 characters due to long mail-merged variables two SMS messages may be sent out.

## Setting Client Records

Before a client can receive an appointment confirmation, the client's SMS preferences need to be set in their record. This enables clients who do not wish to receive an appointment confirmation by SMS to be excluded from the list.

1. Search for the client you wish to enable for sending appointment confirmations and open their client record (Please refer to Client management, Search Functions).
2. In the **'General'** tab make sure the client's email, mobile and home phone numbers are correctly filled in.
3. Click on the **'Marketing'** tab.
4. Select how the client would like to receive their appointment confirmations by placing a tick in the appropriate **'A: Apt Confirm'** check box.



**TIP:** The left hand side of the client marketing tab is broken into four sections; **Send By Mail**, **Contact By Phone**, **Send By Email** and **Send By SMS**. Each panel is then broken down into check boxes that determine whether that particular piece of correspondence will be sent by mail, phone, email or SMS.

**TIP:** You can set up your Client Profiles so that Apt Confirm is automatically ticked under **Send By SMS** when a new client is created. New Client forms should also be set up to ask for client SMS preferences to keep in line with anti-spam laws.

## Sending SMS Appointment Reminders

1. Open the diary and go to the day that you wish to send appointment reminders for.
2. In the top left corner of VetlinkPRO click on the **'Actions'** menu and **'Send Appt Confirmations'**.
3. You will be prompted with a message that asks whether you would like to send appointment confirmations for the current diary or all diaries. Select **'Yes'** to send appointment confirmations for the selected diary or **'No'** to send for all diaries.
4. The Appointment Confirmations form will open on the summary page. Make sure a tick is placed in the correct column for the type of reminder confirmation you wish to send.

Appointment Confirmation (Reminder)

Appointments for 22/05/2018

1 : Summary		2 : Phone		3 : Email			4 : SMS		
Client	Start	Finish	TEL	EML	SMS	E.Sts	S. Sts	Appt Sts	Reply
Ben Burnell	3:15 PM	3:30 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UnConfirmed	(Memo)
Freda Dagg	3:45 PM	4:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UnConfirmed	(Memo)
Joe Bloggs	3:00 PM	3:15 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UnConfirmed	(Memo)

Client Name

Exit

5. Select the type of communication you wish to send by clicking on the corresponding tab at the top of the form. All clients that are registered to be sent appointment reminders by that type of communication will be listed in the form.

Appointment Confirmation (Reminder)

Appointments for 22/05/2018

1 : Summary		2 : Phone		3 : Email			4 : SMS		
Client Name	Staff & Reason	Start	Finish	Edit	Status				
Ben Burnell	JB Consultation [Ted]	3:15 PM	3:30 PM	<input checked="" type="checkbox"/>	None				
Freda Dagg	AS Consultation [Scotty]	3:45 PM	4:00 PM	<input checked="" type="checkbox"/>	None				
Joe Bloggs	AS Consultation [Fluffy]	3:00 PM	3:15 PM	<input checked="" type="checkbox"/>	None				

Client Name

Send All

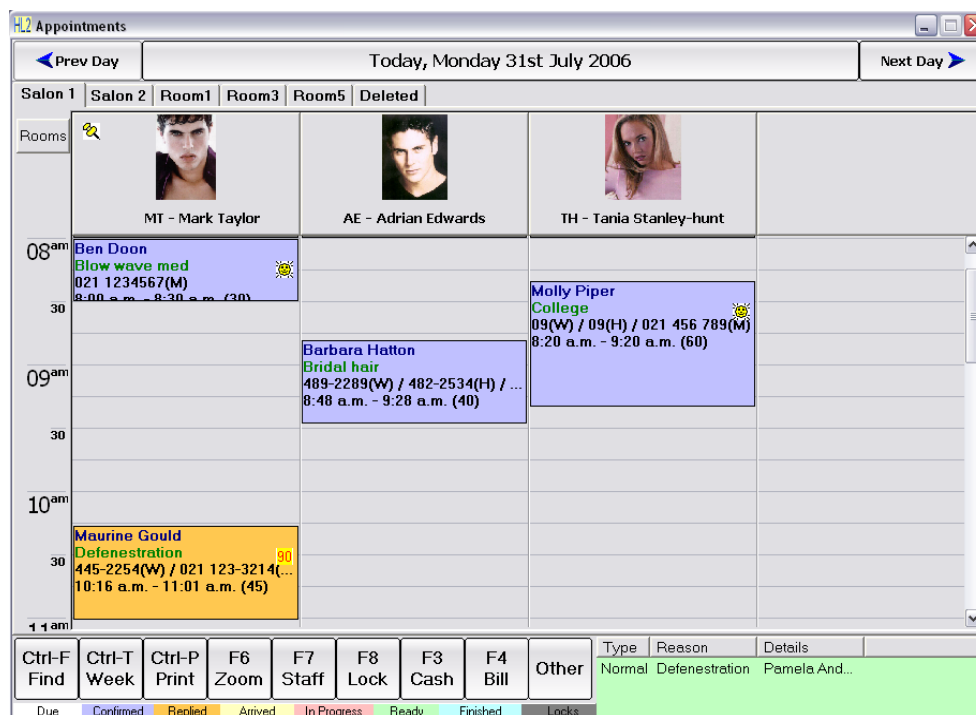
Exit

6. To send all the SMS or Email messages click on the **'Send'** button at the bottom of the screen.

## Checking SMS Confirmations and Replies

When a client replies to an SMS message with anything beginning with 'Y' or 'y' the appointment will be confirmed and turns purple.

If the client replies with a message not beginning with 'Y' or 'y' the appointment will turn orange which indicates a reply other than 'Yes' has been sent. To view the reply, right click on the appointment and choose Email / SMS and then click on 'Look at Reply'. Alternatively you can look in the document manager of a client's record to view the reply.





# SENDING SMS MESSAGES FROM THE DIARY

VetlinkPRO also allows you to send one off text messages from the diary. These messages are particularly handy for informing clients when an patient is ready to be discharged or on the progress of an patient in hospital. These messages cannot be replied to.

## Sending Custom SMS from the Diary

1. Right click on an appointment in the diary.
2. Select **'Email / SMS'** and then **'Custom Message'**.
3. The custom message form will open.
4. Load a template or type the message into the SMS or Email panel depending on the communication you wish to send.
5. If you are sending an appointment reminder and would like a reply, tick the **'Reply Required'** box. The reply will only be used for confirming appointments.

Send Email / SMS

Send Email / SMS to Cumin Tegan

**SMS**

Cell Number: 0432145432 ☒ Reply Required Characters : 128

Load Template: Surgery Finished

Message: Hi Tegan, Muffin's surgery went well & Muffin is recovering well. Pickup can be done after 4pm. For any questions call 123456687

Reply Message:

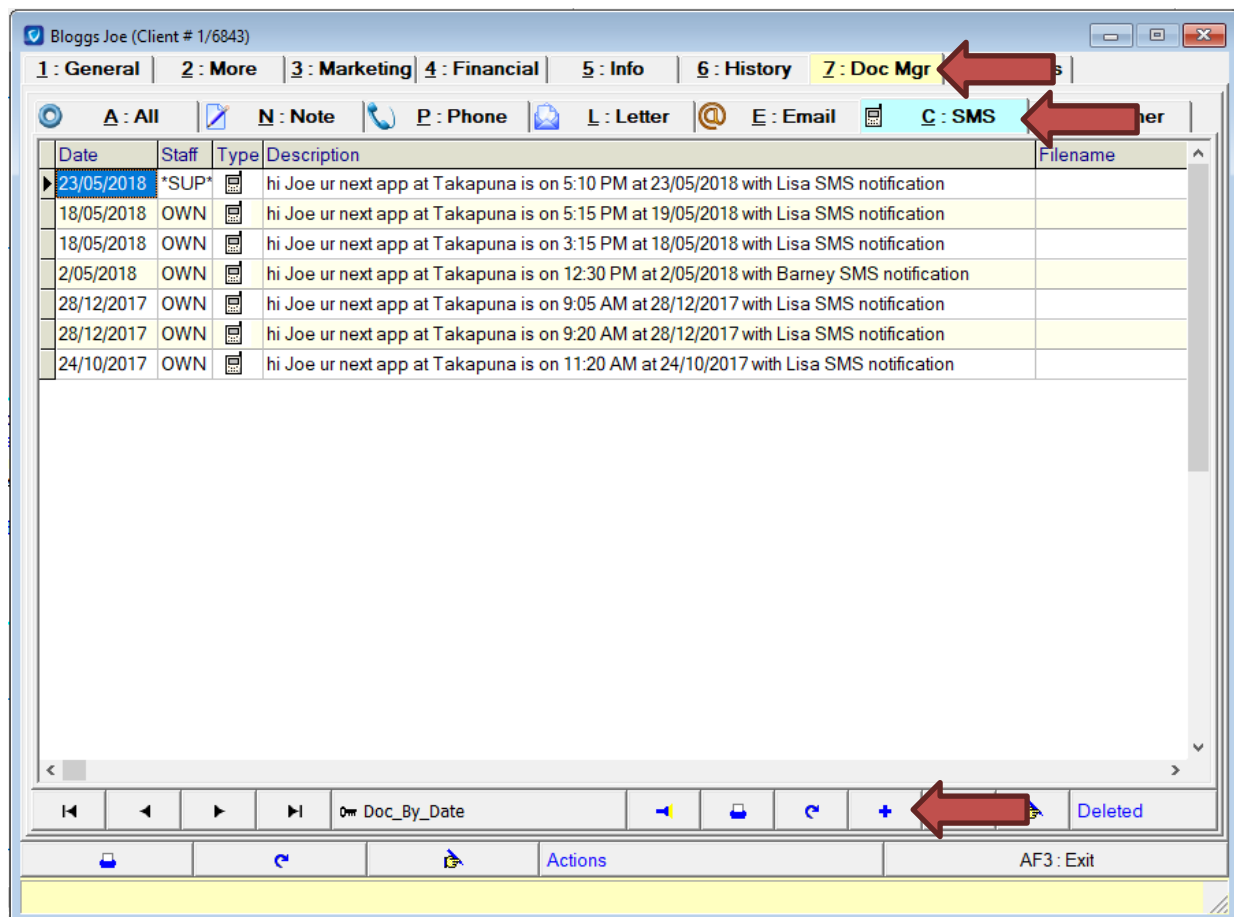
## Creating Custom SMS template

Custom SMS/Email can be configured from [Options | Picklists Setup | Diary | Custom SMS / Email Templates](#).

# SENDING SMS MESSAGES FROM DOC MANAGER

Custom SMS messages can also be sent from a client's document manager.

1. Search for and open the client record for which you wish to send an SMS message to.
2. Click on the **'Document Manager'** tab on then on the **SMS** tab.
3. Click the **+** button at the bottom to create a new SMS.
4. Select the Staff Member who is sending the SMS.
5. Type the message that you wish to send to the client.
6. Click on the **'Save'** button and the message will be sent to the client.



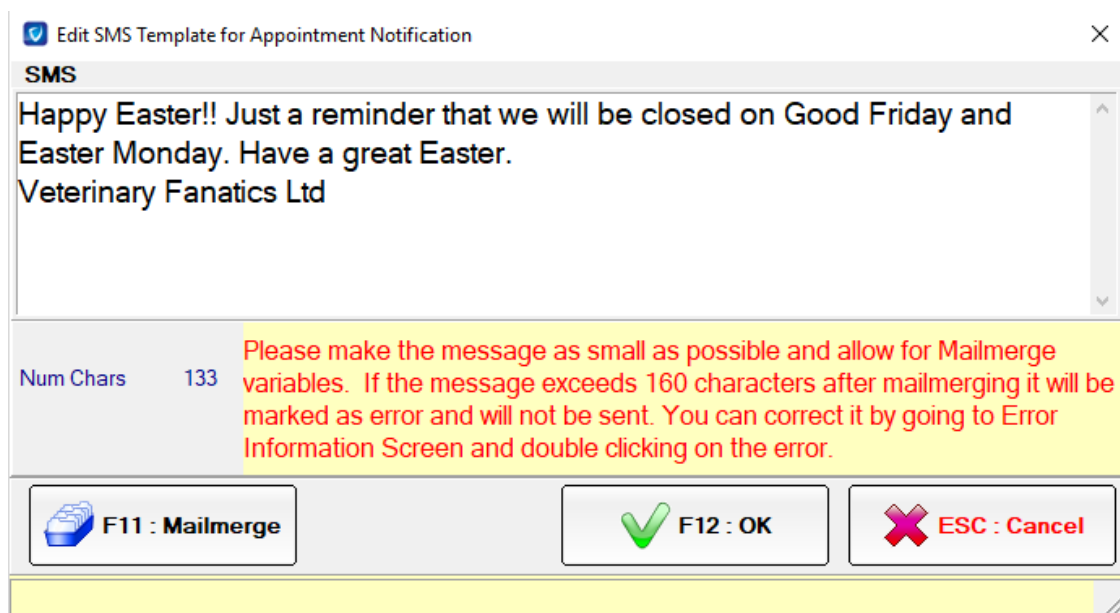
# BULK MAILER SMS MESSAGES

## How to Set Up a Bulk Mailer

1. Click on the **'Reports'** button from the tool bar.
2. Double-click the **'Bulk Mailers'** button.
3. Next click on the **'Add New'** button.
4. Click **'Yes'** to the **'Design New Report'** prompt.

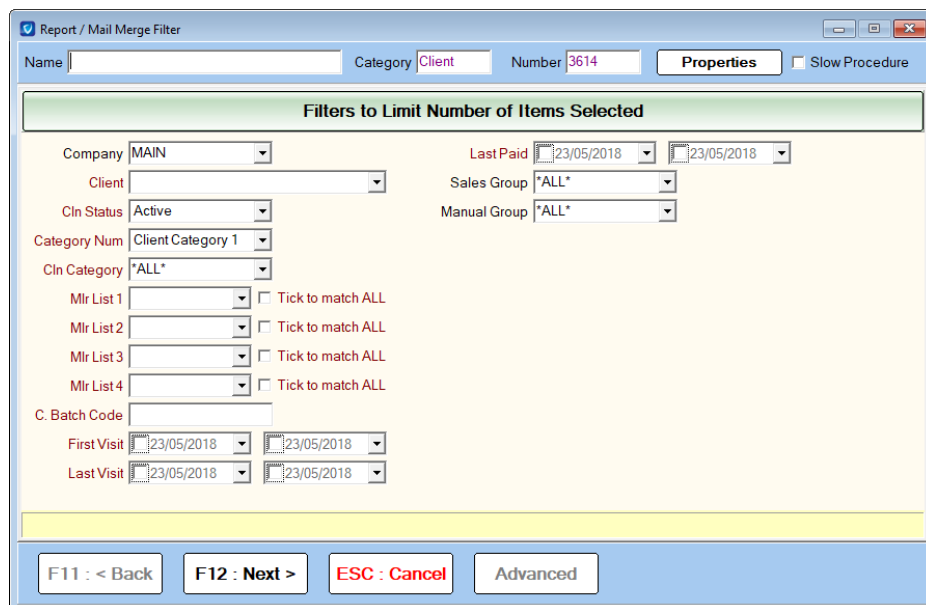
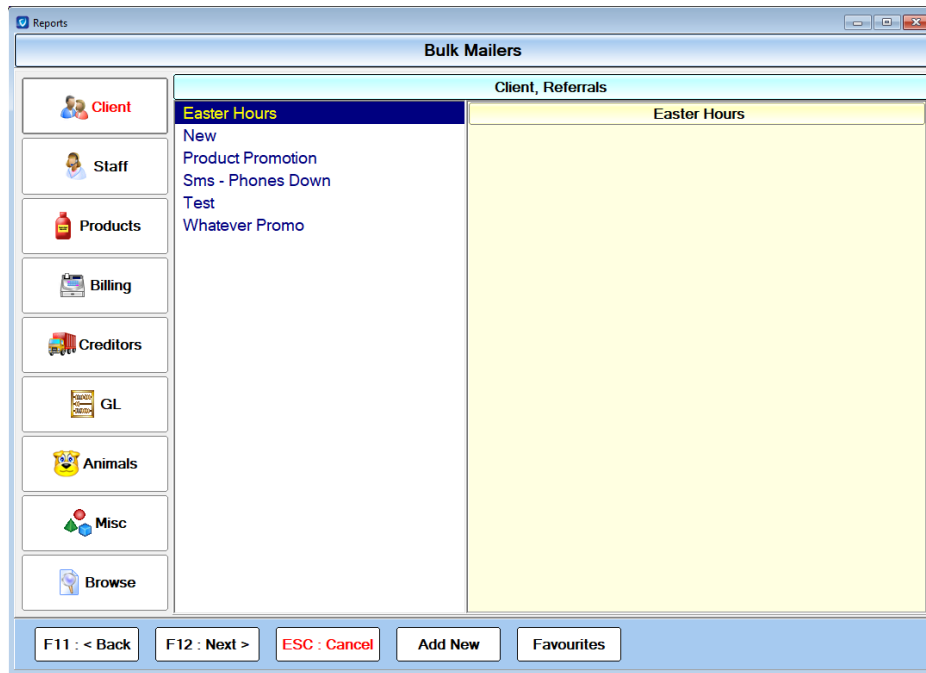
5. In the **'Name'** field enter the name for the SMS (e.g. Mother's Day).
6. From the **'Category'** drop down list select what category the bulk mailer will appear.
7. From the table link drop down menu choose which table link you wish to use for this document. Depending on the link you select you can then choose the tables from which to get information from in the **'Use Following Tables'** section.
8. Choose any special filters that you may wish to use. For example, you may wish to send only one SMS per client, choose **'Client'** from the **'One Entry per'** drop down list.

9. Under the **'Use Client Marketing Tab'** section, select which clients to send SMS messages to by clicking on the **'Txt / Sms'** drop down list. This section uses the information set up in the client record.
  - a. **Don't Send SMS's:** An SMS message will not be created for clients.
  - b. **If Mobile Entered:** In the client record under the **'General'** tab, if they have a mobile number entered an SMS message will be created for that client. (this option will ignore client marketing preferences.)
  - c. **If Mailers checkbox Ticked in 'By SMS':** In the client record under the **'Marketing'** tab, if the **'Mailers'** check box is ticked in the **'Send By SMS' section**, an SMS message will be created for that client.
10. Click on the **'SF8: New'** button to create a new SMS template.
11. You will be prompted to enter a file name for your document (usually the same as the name for the bulk mailer report you are creating), then click **'OK'**.
12. The word processor will open; enter the text for your SMS. This can include mail merge variables.
13. When you have finished, click the save button in the bottom right hand corner to save the document.
14. Now select the Exit button from the bottom right hand corner of the bulk mailers dialog box.
15. You have now completed setting up your SMS template.



## Sending Bulk SMS Messages

1. Click on the **'Reports'** button from the tool bar.
2. Double-click the **'Bulk Mailers'** button.
3. From the Bulk Mailers window chose the category of the bulk mailer you wish to send.
4. Double click on the bulk mailer you wish to send and the filter page will open.



- Choose the filters that you want to limit the search by and click the '**F12: Next**' button to start the search.
- A list will be created with all the results matching the specified filters.
- Click on the SMS tab and uncheck any clients who you do not wish to receive the SMS.

Report / Mail Merge Filter

Name:  Category:  Number:  Properties ☐ Slow Procedure

Verify the Selection then Send to Printer / Email / SMS

All Print Email **SMS / Txt**

Num	Inc	Sms	Name	Animal	Ann_Details	CellPhone	Cln_Num
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Joe Bloggs			0211234567	1/1001
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ben Burnell			0217894561	1/1008
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Freda Dagg			0216543854	1/1003
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Daniel Finlay			0216538945	1/1005
5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Greg Martin			0212354681	1/1004
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anna Smithy			0216741653	1/1002
7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lisa Sullivan			0216431867	1/1007
8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Julia Wall			0219432187	1/1010
9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Belinda Weekes			0219836152	1/1009
10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sue Williams			0213261452	1/1006

Primary Show All Show Inc Show Exc Show Errors

Total 10 Included 10 To Print 0 To Email 10 To SMS 0 Press Refresh to update these figures  
Errors 0 Excluded 0 Printed 0 Eml Sent 0 SMS Sent 0

F11 : < Back Send SMS ESC : Cancel Labels List Export

- Once you have chosen who to send the SMS message to click on the '**Send SMS**' button.
- Any messages that are unable to be sent will be in the error information list.

## SMS CONVERSATION WITH CLIENT



VetlinkPRO supports two-way conversations using SMS. If a message is sent to a client from VetlinkPRO, that client can reply with a message that will be recorded for viewing in VetlinkPRO. The notification bar will alert users to any new SMS messages that have not been read. An SMS icon will also appear on the appointment of clients that have replied to a SMS.



**IMPORTANT:** Clients can only reply to messages that were initiated from VetlinkPRO and only the first reply will be recorded.

### View SMS Conversation from Client Appointment

When a client has an unresolved SMS (e.g. an SMS that may not have been viewed or actioned), an SMS icon will appear in the top right hand corner of the appointment. When the SMS has been resolved it will disappear. To view the SMS conversation with the client right click on the client and select '[Email / SMS | SMS Conversation with Client](#)'.

Rainer Steve	
Bonnie [FY] Dog ( yr )	
Accident	
0274512149(M)	
11:20 a.m. - 11:50 a.m. (30)	

## View SMS Conversation from Notification Toolbar

When the SMS icon on the notification toolbar is flashing or is bright red you have an incoming SMS message that has not been read. When you click on the mobile phone icon the **'SMS Messages and Replies Summary'** window will open.



The **'SMS Messages and Replies Summary'** window will show all clients that have a SMS message that has not been resolved / marked as read. Double Clicking on the client name will open the **'SMS conversation'** window.

SMS Messages and Replies Summary

From: 23/04/2018 To: 24/05/2018 ☐ Show Resolved Entries ☐ Show All Branches

Name	Reply	Original Msg	Staff	Received	Sent	Status	Doc Num	Per Number
						Sent		

Ref Number + Clear All Exit



## SMS CONVERSATION WINDOW

The '**SMS conversation**' window will show all the messages sent from VetlinkPRO on the left with the reply from the client on the right. Users can also select a date range to view the messages within any 7 day period. When a message is read or actioned you should mark it as resolved. Marking a message as resolved will remove it from the notification toolbar.

To reply to a SMS message sent from a client click on the '**Send SMS**' button. This will open the custom SMS window for you to type your SMS message.

The screenshot shows the 'SMS CONVERSATION' window with the title 'SMS Messages and Replies for Test Test'. It includes date range filters (From: 1/12/2020, To: 31/12/2020), a search button (F12 : Search), and navigation buttons (Prev Mth, Next Mth). A table displays one message with its details and a 'Resolved' checkbox.

Doc Num	Message	Reply	Resolved
# 1/129	3/12/2020 3:25:55 PM Hello Test, Catty is due at 4:00 PM on 3/12/2020. Please reply Y to confirm	3/12/2020 3:28:30 PM Can I change the time?	<input type="checkbox"/>

At the bottom, there are three buttons: 'Mark All as Resolved', 'Esc : Exit', and 'Send SMS'.

## SEND APPOINTMENT DETAILS TO STAFF

This function sends a list of appointments to a staff member via SMS. This can be handy for example if a staff member is doing farm calls all day but does not wish to go into the clinic to check the diary.

1. Open the **Diary**.
2. Click on the **'Actions'** menu at the top of VetlinkPRO and choose **'Send SMS to Staff'**.
3. Select the filters from which the appointment list is created
  - a. **Diary**: The diary for which the appointment list is to be generated from.
  - b. **Staff**: The staff member which the SMS will be sent to and whose appointments the appointment list will be generated from.
  - c. **Appts On**: The appointment list is generated from appointments on this date.
  - d. **Appts From**: Only appointments after this time will be included in the appointment list.
  - e. **Appts Till**: Only appointments before this time will be included in the appointment list.
  - f. **Resend**: If this is set to **'NO'**. The appointment will not be sent to the staff member again if they have already received an SMS detailing this appointment.
4. Click **'Send SMS'** to send.

The screenshot shows a software window titled "SMS/EMAIL OPTIONS FOR STAFF IN DIARY". Inside, there's a section titled "Appointment Details" with several filters:
 

- Diary**: Small Animal
- Staff**: RR
- Appts on**: 3/12/2020
- Appts From**: 8:00 AM
- Appts Till**: 7:00 PM
- Resend**: No

 Below these filters, a message states: "Found 1 Appointment(s) for Roger Rabbitt on 3/12/2020 between 08:00 AM and 07:00 PM (incl) in Small Animal diary". At the bottom, there are three buttons: "Send SMS" (with a mobile phone icon), "Send Email" (with an @ symbol icon), and "Esc: Exit" (with a green arrow icon).

## SEND TO-DO LIST DETAILS TO STAFF

The Send To-Do list details to staff function sends a list of To-Do list items to staff member via SMS. This is handy if a staff member is not at the clinic as they can still receive the To-Do list messages on time, rather than receiving them when they are next in the clinic which could be too late. For more information on the To-Do List please refer to The Appointment Book chapter.

1. Open the **Diary**.
2. Click on the **'Actions'** menu at the top of VetlinkPRO and choose **'Send SMS to Staff'**.
3. Select the filters from which the To-Do List is created
  - a. **Staff:** The staff member which the SMS will be sent to and whose appointments the appointment list will be generated from.
  - b. **Items From:** The date on which the To-Do items to be sent is generated.
  - c. **Resend:** If this is set to **'NO'**. The to-do item will not be sent to the staff member again if they have already received an SMS detailing this to-do item.
4. Click **'Alt-T'** to send.

The screenshot shows a software window titled "SMS/EMAIL OPTIONS FOR STAFF IN DIARY". Inside, there is a section titled "To Do" Details. It contains three input fields: "Staff" with a dropdown menu showing "MCD", "Items From" with a date field showing "3/12/2020", and "Resend" with a dropdown menu showing "No". Below these fields, a message states "Found 1 To-Do list(s) for Dr. Jenny Jones from 3/12/2020". At the bottom of the window, there are two buttons: "Alt+T Send" (with a mobile phone icon) and "Esc: Exit" (with a green arrow icon).

## CHECKING SMS FOR ERRORS

There are times SMS messages may not be sent due to incomplete mobile numbers or the internet is down. All SMS messages that have not been sent are shown in the error information screen for you to view. It is good practice to check this screen each day for unsent SMS messages.

1. Click on the **'Utilities'** menu and then on **'Error Information'**.
2. Click on the **'Documents'** tab and all email and SMS documents in error will be listed.

<b>Clear Error:</b>	This button will clear the selected error and the SMS background will attempt to send it again. If it is still unable to be sent, it will go back into error.
<b>Client:</b>	This button will open the client record for the selected error. This will enable you to check the cell phone number and the status of other text messages in the document manager.
<b>Delete:</b>	This button will delete the selected error. The system will not try to resend the message, it will simply be deleted.

Doc#	For	Document	Err_Type	Detail
10000001782	Joanne Bloggs	SMS	42	SMS message is too long
10000001750	Joe Bloggs	SMS	42	SMS message is too long
10000001744	Marco Aan De Brugh	SMS	42	SMS message is too long
10000001734	Greg & Carolyn Alexander	Email	37	Invalid Email, see Evt Log
10000001697	Test Merge Fields for mail merge	SMS	42	SMS message is too long
10000001675	Chloe Adlam	Email	37	Invalid Email, see Evt Log