

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"**.

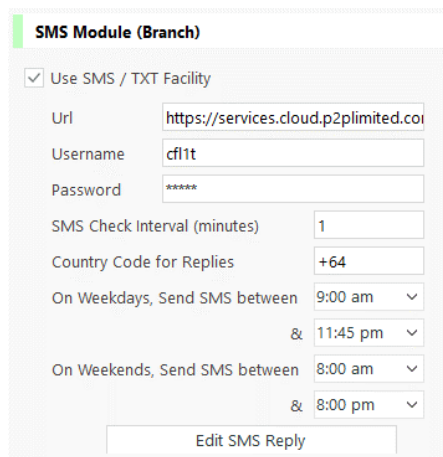
It is highly recommended to add a message such as **"Reply STOP to unsub"** to the end of any marketing material that is broadcast by SMS. If the client replies **"STOP"** the **Send By SMS** marketing fields under the **More** tab of the client record such as Mailers, Promotions and Newsletters will 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 VetlinkPRO 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 Module (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 either automatically, or via SMS in a few simple clicks of the mouse if you prefer to double check what you send. 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 VetlinkPRO. You can however edit the default messages that are sent to clients by following the steps below. Appointment Confirmation messages can be set on the in with a Generic Template, Diary Based templates and Reason based templates. The template that will be sent is based on following priority.

(1) Reason Based Message

If reason based message is linked to the appointment reason patient booked in for, reason based message is used.

(2) Diary Based Message

If Reason based message does not exist and diary based message is linked to the diary patient booked into, diary based message is used.

(3) Generic Message

If reason and diary based messages don't exist, the generic message is sent.

Editing Generic 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 **'Mailmerge'** button.
5. Click on the **'OK'** button to save the SMS.

Editing Generic 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 **'Mailmerge'** button.
5. Click on the **'OK'** button to save the SMS.

Editing Generic SMS Appointment Notification Message

This is the message that will be sent to clients in bulk 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 **'Mailmerge'** button.
6. Click on the **'OK'** button to save the SMS.

Diary / Hotel Setup

1 : Diary Options 2 : More Options 3 : Hotel Options 4 : Telem Options

General (Branch)

Allocation and Usage

☒ Use Diary System

Mths to Keep Diary Records for (1-84) 12

Weeks to Pre-Allocate Diary (1-60) 30

Weeks to Allocate Standing Apts (1-60) 8

Billing

☒ Record Rebooks in Billing

☒ Bill all Reasons for Linked Appointments

Printing

☐ Printouts contain phone number

☒ Print Address in Appointment Notes

Clients

☒ Minimal Entry for new Clients

☒ Check if New Cln already in Database

Diaries

☒ Group Appointments in Arrivals Due List

☐ Collapse Linked Apts in the Holding Tank

☒ Leave copy of Appointment in diary after transferring to Surgery / Hospital

☒ Use Conflicts Diary

Email and SMS (Branch)

Send Appointments To Clients

☒ Email Appointment Reminder Telem Standard

☒ Email Appointment Notification Telem Standard

☒ Email Appointment Confirmation Telem Standard

☒ SMS Appointment Reminder Telem Standard

☒ SMS Appointment Notification Telem Standard

☒ SMS Appointment Confirmation Telem Standard

SMS/Email, if Appt is moved by 24 hours from now

☐ Send email attachment to import into Calendar

Email Appointments To Staff

☒ Send Automatically

For this to work

1. Set "Send Email to Staff" in Diary Profile
2. Set "Auto email appointments" for each staff, in Staff Roster, for each Diary

Resend if appointment is moved more than 5 mins.

SMS Appointment Notification template

SMS

Notification!
@FirstName @LastName, You have an appointment for @Reason1, on @Date,
at @Start with Staff: @Staff

Appended Reply Message

116
Number of characters

Please make the message as small as possible and allow for Mailmerge variables. If the message exceeds 160 characters it will still be sent. The message may be shown split as several messages depending on the recipients ISP and phone.

Mailmerge OK Cancel

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 6/8/2023...”

To configure Reason based appointment reminders

1. Go to [Options | Picklists Setup | Diary | Diary Reasons](#)
2. Select [reason | Click the Email and SMS tab | Edit SMS or Email Appointment Reminder, Notification or Confirmation](#) as required.
3. Click [Telemedicine](#) to edit the telemedicine template or [Standard](#) to edit the normal template.

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

SMS appointments to clients

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

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

Exclude Appointment Reason from being Sent

For some appointment reasons, e.g. Euthanasia, you might not want an appointment reminder to be sent. You can exclude this from being picked up.

To exclude;

1. Click [Options](#) then [Picklist Setup](#)
2. Expand [Diary](#) then double click [Diary Reason](#).
3. Double click diary reason to exclude
4. For;
 - a. Single branch: Set [Notification](#) to [Excluded](#)
 - b. Multi Branch: Click [Select Branch](#) button and set [Notification](#) to [Excluded](#)
5. Click [Accept](#) and exit.

Editing Diary based Appointment Confirmation Messages

As well as having a generic template and reason based templates you can also set a template for a diary. For example your surgery diary may have a message saying to drop patient off at 8am rather than advising the time of the appointment.

1. Go to **Options | Picklists Setup | Diary | Diary Profile**
2. Select **Profile** to add template to.
3. Click the **Email and SMS tab | Edit SMS or Email Appointment Reminder, Notification or Confirmation** as required.
4. Click **Telemedicine** to edit the telemedicine template or **Standard** to edit the normal template.

Exclude Diary from sending Confirmations.

For some Diaries you may wish to exclude them from sending SMS confirmation. For example you may have a Client Orders diary which doesn't need appointment reminders sent for it..

To exclude;

1. Click **Options** then **Picklist Setup**
2. Expand **Diary** then double click **Diary Profile**.
3. Double click diary profile to exclude
4. Set **Notification** to **Excluded**
5. Click **Accept** and exit.

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 **'Mailmerge'** button.
5. Click on the **'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

Manually Sending 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 **'Diary'** menu and **'Send Appt Confirmation'**.
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.

Client	Staff & Reason	Start	Finish	TEL	EML	SMS	E.Sts	S.Sts	Appt Status	Reply
Up Smith	AP AA-Consultati...	4:00 pm	4:15 pm			<input checked="" type="checkbox"/>			UnConfirmed	
Alice Rowell	LOC Consult dog ...	11:00 am	11:30 am	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			UnConfirmed	
Linda Bloggs	MF A.I. dog [Benji]	10:00 am	11:00 am	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			UnConfirmed	

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.

Client	Staff & Reason	Start	Finish	Phone	Edit	Status	Doc Ref
Up Smith	AP AA-Consultation ...	4:00 pm	4:15 pm	0210666200		None	
Alice Rowell	LOC Consult dog [FL...	11:00 am	11:30 am	0210666200		None	1/21502
Linda Bloggs	MF A.I. dog [Benji]	10:00 am	11:00 am	0210666200		None	1/21504

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

Automating Appointment Reminder Sending

1. Click on the **'Reports'** button.
2. Double-click on the **'Automate'** button. The report properties window will open.
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 automated email or SMS (e.g. Appointment Reminders).
6. Under **'Table Link'**, select **Apt-> Cln/Anm.**
7. From the **One Entry Per** drop down list select how many appointment reminders to send if multiple bookings exist for a client.

Client	If multiple reminders exist, by setting the One Entry Per field to Client , a mailer will only be sent for the first appointment for the client.
Patient	If multiple reminders exist by setting the One Entry Per field to Patient , a separate mailer will be sent for the first appointment for each patient the client has.

8. Under the **'Use Client Marketing Tab'** section, select which clients to send emails or SMS messages to by clicking on the drop-down list in each field. This section uses the information set up in the client record.

Email

Don't Send Emails:

Emails will not be generated for clients.

If Email Entered:

In the client record under the general tab, if an email address is entered, an email will be created for that client.

If Automation checkbox Ticked in 'By Email':

In the client record under the **'Marketing'** tab, if the **'Apt Confirm'** check box is ticked in the **'Send By Email'** section, an email will be created for that client.

Txt / SMS

Don't Send Smss:

SMS's will not be generated for clients.

If Mobile Entered:

In the client record under the **'General'** tab, if a mobile number is entered, an SMS will be created for that client.

If Automation checkbox Ticked in 'By SMS':

In the client record under the **'Marketing'** tab, if the **'Apt Confirm'** check box is ticked in the **'Send By SMS'** section, an SMS will be created for that client.

9. Click on the **'New'** button to create a new template. You may do this for each type of communication you wish to use. e.g. an email or SMS.



NOTE: In the '**Template to Use**' section you can also choose an existing template and you can then edit this template by clicking on the button on the same line.

NOTE: SMS messages are charged per 160 characters sent. If your message is over 160 characters you will be charged for two or more SMS.

10. You will be prompted to enter a file name for your mailer document, enter a filename then click '**OK**'.
11. The appropriate processor will open depending on the type of document; enter the text for your mail merge document.
12. When you have finished, click the save button in the top left-hand corner. Next click the cross in the top right-hand corner to close the window.
13. Click '**Save**' then '**Yes**' to the prompt to save the settings.
14. Your Appointment Reminder Mailer should now be saved to the Automation List. Select the Automation you have just created
15. Click the **Schedule** tab to set the Schedule
 - a. **Repeat Every:** Set the frequency the reminder are sent. Eg. Every 1 Day.
 - b. **Cut-Off Time:** The time the reminders will be sent. The automated reminders are created at midnight and then are sent at the cut off time. This is so staff are able to check the reminders if they wish before sending.
 - c. **Channel 1:** The way that you would prefer reminders to be sent. (Email or SMS).
 - d. **Channel 2:** The way that reminders will be sent if it cannot be sent via Channel 1. (Eg. they do not have an email).
16. Click the **Filters** tab to choose what reminders will be sent. The most relevant filters are listed below.
 - a. **Diary:** The diary you wish to send Appointment reminders for.
 - b. **Dry State:** Appointment state you wish to send appointment reminders for. Usually you would just select **Booked**, however you could resend for client that have already confirmed if you wish.
 - c. **Comms For:** You can choose the message type to send. Usually the notification message.
 - d. **Apt Date:** The day you wish to send the appointment reminders for. Eg Today + 1 day will send for appointments booked in tomorrow.
17. Click '**Save**'.

Note: The template used to send the appointment reminder will be on the priority below. You can exclude reasons / diaries from sending reminder in the reason/diary record as well.

(1) Reason Based Message

If reason based message is linked to the appointment reason patient booked in for, reason based message is used.

(2) Diary Based Message

If Reason based message does not exist and diary based message is linked to the diary patient booked into, diary based message is used.

(3) Generic Message

If reason and diary based messages don't exist, the generic message is sent.

SENDING CUSTOM 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 a patient is ready to be discharged or on the progress of a 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 to Rowell Alice

SMS

Cell Number: 0279007310 Characters : 131

Load Template: [Dropdown]

Message: Hi Alice, Fluffy's surgery went well and Fluffy is recovering well. Pick up can be done after 4pm. For any questions call 123456687

Reply Message: [Text Area]

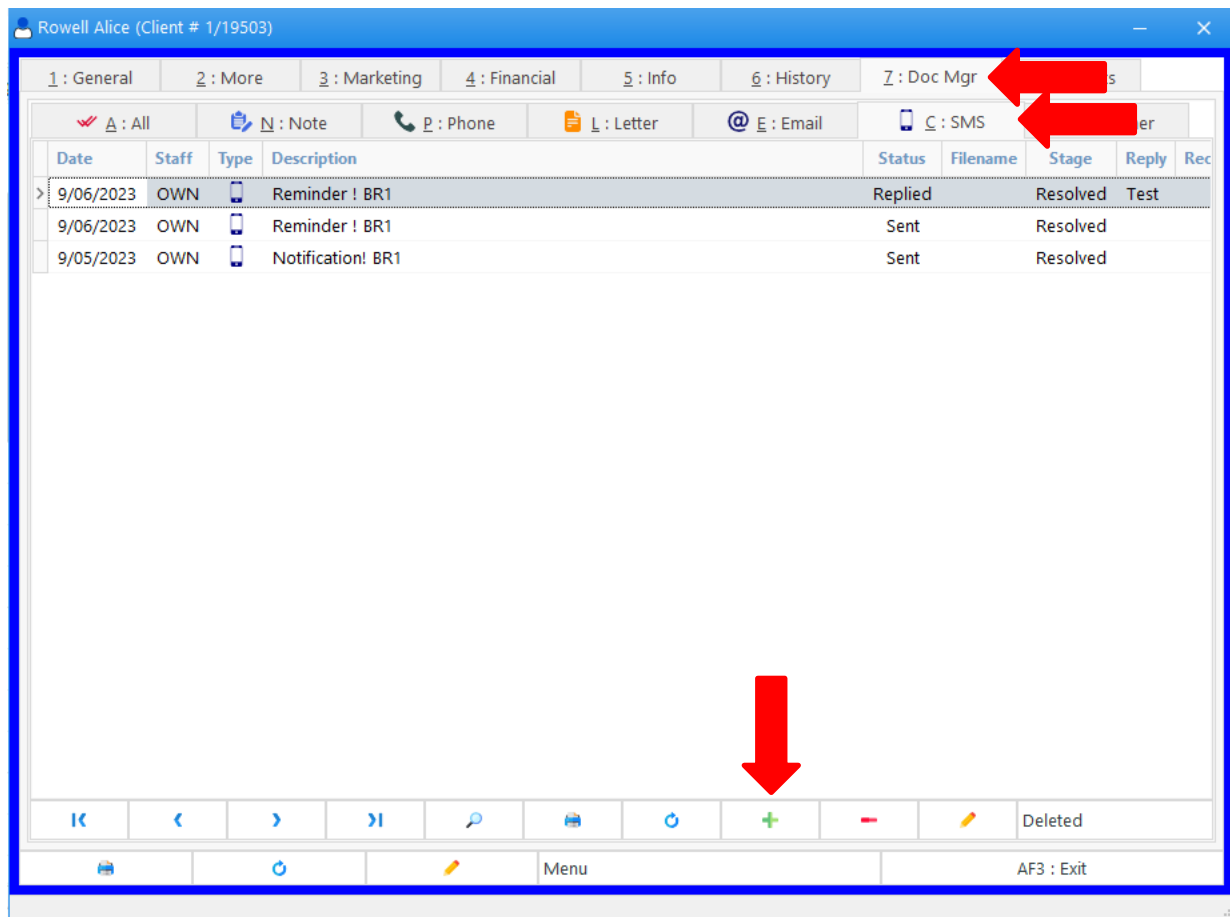
Creating Custom SMS template

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.

New (Report #0)

Name: Status: Profile:

Category: Mailers: Preview: Reserved:

Printer: Shared: Custom Props:

Table Link:

Use Following Tables

<input checked="" type="checkbox"/> Client	<input type="checkbox"/> Product	<input type="checkbox"/> Creditor Invoice
<input checked="" type="checkbox"/> Client Address	<input type="checkbox"/> Reminder	<input type="checkbox"/> Creditor Payment
<input checked="" type="checkbox"/> Client Contact	<input type="checkbox"/> History	<input type="checkbox"/> Referral
<input checked="" type="checkbox"/> Client Account	<input type="checkbox"/> Health Plan	<input type="checkbox"/> Referral Staff
<input type="checkbox"/> Patients	<input type="checkbox"/> Appointment	<input type="checkbox"/> Referral clinic
<input type="checkbox"/> Bill	<input type="checkbox"/> Supplier	<input type="checkbox"/> Referral Address
<input type="checkbox"/> Bill Item	<input type="checkbox"/> Order	<input type="checkbox"/> Referral Contact

Special Filters

Audit:

One Entry per:

Client Group:

Bill Type:

Complex Item:

Use Client Marketing Tab

Document:

Email:

Txt / Sms:

Template to Use

F6 : Edit SF6 : New

F7 : Edit SF7 : New

F8 : Edit SF8 : New

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 **'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.

Edit SMS Template for Notification

SMS

Happy Easter!! Just a reminder that we will be closed on Good Friday and Easter Monday. Have a great Easter.
Veterinary Fanatics Limited

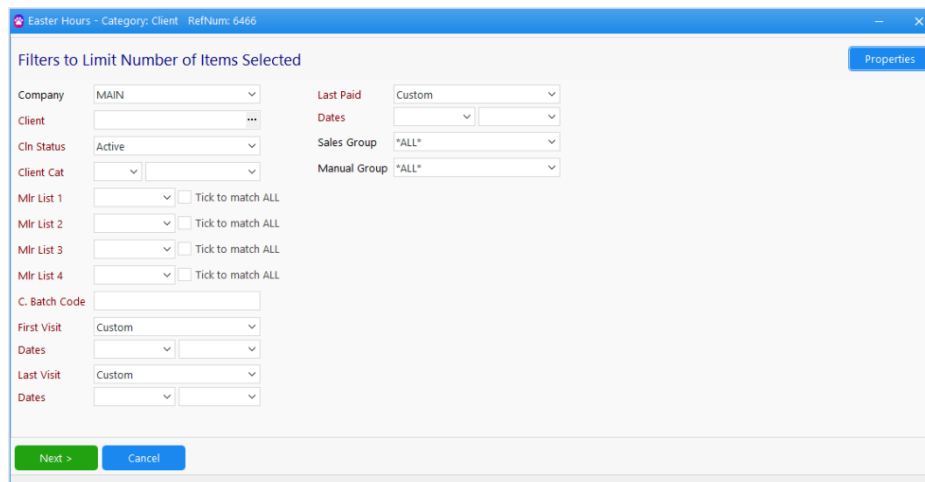
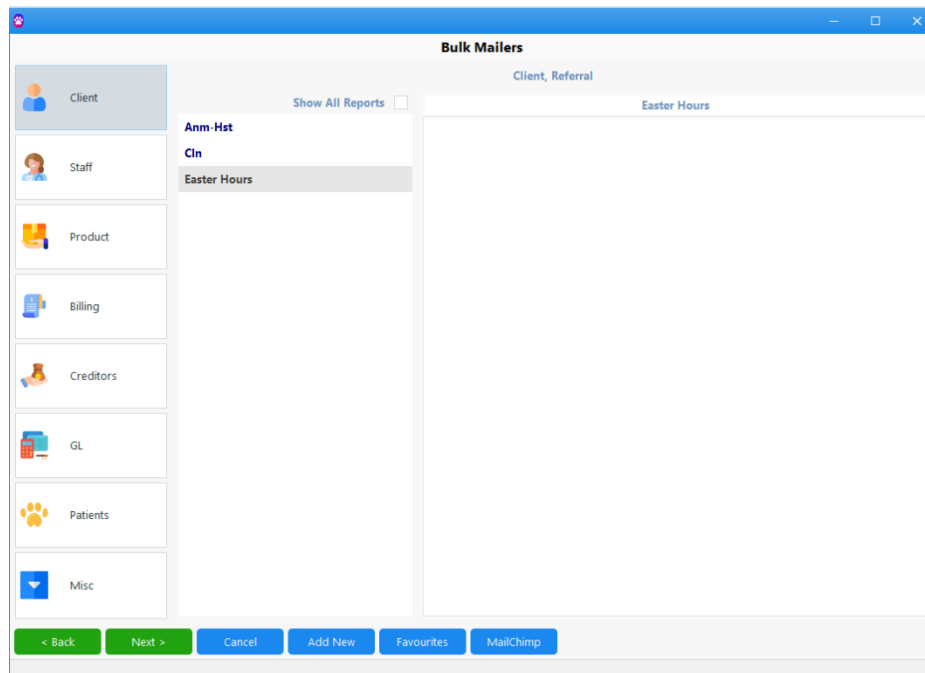
137
Number of characters

Please make the message as small as possible and allow for Mailmerge variables. If the message exceeds 160 characters it will still be sent. The message may be shown split as several messages depending on the recipients ISP and phone.

Mailmerge OK Cancel

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 **'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.

Easter Hours - Category: Client RefNum: 6466

Verify the Selection then Send to Printer / Email / SMS

Showing Included Entries Only

#	Num	Inc	Sms	Client	Mobile	Client Num
> 2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Richard	0210666200	1/10913
3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Roland	0210666200	2/45154
4		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Aliz AAZurcher	0210666200	2/45446
12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Aziza Adams	0210666200	1/22060
13		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlotte Adams	0210666200	1/24208
18		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kevin Adams	0210666200	1/22528
19		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kimberlee Adams	0210666200	1/23633
29		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Duane Addis	0210666200	1/8130
30		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ted Addis	021000000001	1/1025
32		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	E Addy	0210666200	1/20519
34		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mel Adlam	0210666200	1/22179

Total 6632 Errors 0 Included 2227 Excluded 4405 To Print 0 Printed 0 To Email 0 Eml Sent 0 To SMS 2227 SMS Sent 0

Press Refresh to update these figures

< Back Send SMS Cancel Labels List Export MailChimp

- 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](#)'.

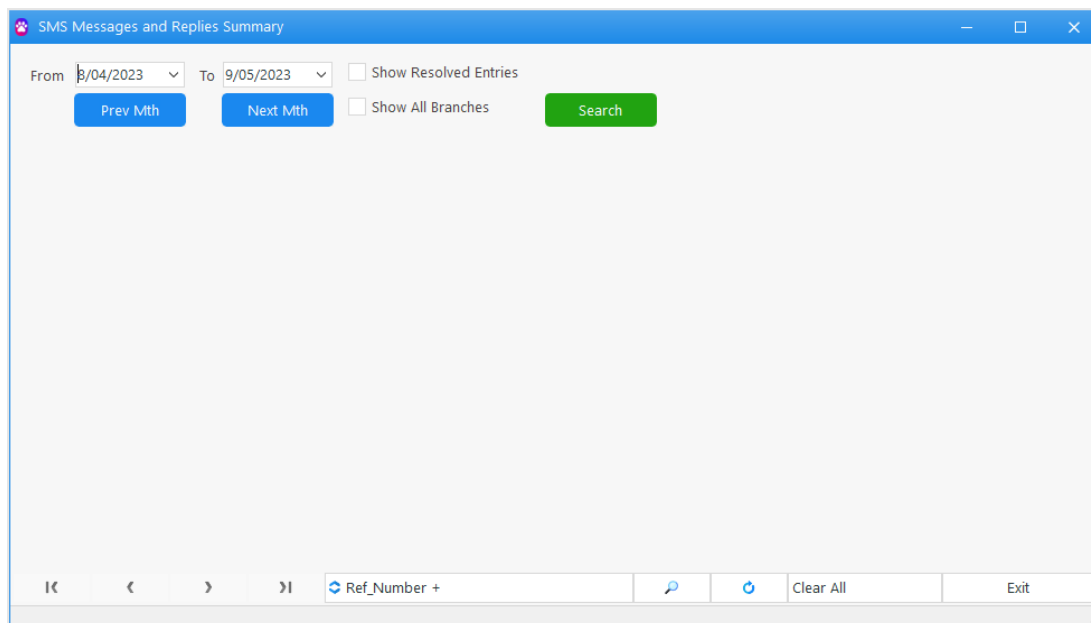
Rainer Steve	
Bonnie [FY] Dog (yr)	
Accident	
0274512149(M)	
11:20 a.m. - 11:50 a.m. (30)	

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's name will open the **'SMS conversation'** window.



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.

SMS Conversation

SMS Messages and Replies for Rowell Alice

From: 1/06/2023 To: 30/06/2023 ☒ Show Resolved Entries

Prev Month Next Month 4 messages. Search

* Doc Num	Message	Reply	Resolved
# 1/21524	Reminder ! BR1 Is this you? Health Check, on 10/06/2023 , at 10:00 am with Staff: Dr. Jarvie Leanne for Alice Rowell max of 160 characters.		<input checked="" type="checkbox"/>
# 1/21527	Reminder ! BR1 Is this you? Health Check, on 10/06/2023 , at 10:00 am with Staff: Dr. Jarvie Leanne for Alice Rowell max of 160 characters.	30/12/1899 Test	<input checked="" type="checkbox"/>
# 1/21532	test test	30/12/1899 Test	<input checked="" type="checkbox"/>
> # 1/21533	test 2	30/12/1899 Test	<input checked="" type="checkbox"/>

Mark All as Resolved Send SMS Exit

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 **'Diary'** 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.

SMS/Email Options for Staff in Diary - Appointment Details

Diary	Tkp Consults	Appts From	12:00 pm
Staff	SY	Appts Till	12:00 pm
Appts on	4/07/2023	Resend	No

Found 1 Appointment(s) for Dr. King Sales Donald on 4/07/2023 between

Send Email

Send SMS

Exit


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 **'Send To Do'**.
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.

CHECKING SMS FOR ERRORS

There are times SMS messages may not be sent due to incomplete mobile numbers or that 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  icon at the top of the screen.
2. Click on the **'Documents'** tab and all email and SMS documents in error will be listed.

Clear Error:

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.

Client:

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.

Delete:

This button will delete the selected error. The system will not try to resend the message, it will simply be deleted.

✖

Errors found by Background

Branch

Takapuna

Bills		Inward Goods Invoices			Payments		Orders		Documents	
* Ref Number	Date	Person Type	Branch	Number	For	Doc Type	Document	Err Type	Detail	
> 10000021503	9/05/2023 11:18:2...	C	1	10000003014	T Collins	5	Email	59	Invalid Protocol, See Evt Log	
10000021501	9/05/2023 11:18:2...	C		10000022401	Miles Franklin	5	Email	59	Invalid Protocol, See Evt Log	
10000021494	2/05/2023 12:05:4...	C		10000022401	Miles Franklin	5	Email	59	Invalid Protocol, See Evt Log	
10000021486	17/04/2023 11:31:...	C		10000019555	Lisa	5	Email	59	Invalid Protocol, See Evt Log	
10000021480	9/03/2023 2:32:30...	C		10000003640	Sampford Farm	5	Email	59	Invalid Protocol, See Evt Log	
10000021479	9/03/2023 2:32:30...	C		10000003640	Sampford Farm	5	Email	59	Invalid Protocol, See Evt Log	
10000021478	9/03/2023 2:32:30...	C		10000003640	Sampford Farm	5	Email	59	Invalid Protocol, See Evt Log	
10000021471	9/03/2023 12:08:2...	C		10000001851	Waiwhenua Farms Ltd	5	Email	59	Invalid Protocol, See Evt Log	
10000021469	2/03/2023 5:04:56...	C		10000001299	Punauui	5	Email	59	Invalid Protocol, See Evt Log	
10000021466	22/02/2023 5:41:3...	C		10000014572	John Smith	5	Email	59	Invalid Protocol, See Evt Log	
10000021465	22/02/2023 5:41:3...	C		20000044151	Piripi Alderman	5	Email	59	Invalid Protocol, See Evt Log	
10000021464	22/02/2023 5:41:3...	C		10000005921	Debbie Abbott	5	Email	59	Invalid Protocol, See Evt Log	
10000021457	7/12/2022 5:18:38...	C		10000003484	Te Tohe Station	5	Email	59	Invalid Protocol, See Evt Log	
10000021456	29/09/2022 11:40:...	C		10000003210	Stan Molloy	5	Email	59	Invalid Protocol, See Evt Log	
10000021418	18/07/2022 4:59:3...	C		10000022401	Miles Franklin	5	Email	57	Attached file(s) not found	
10000021404	21/06/2022 2:55:3...	C		10000004254	G B & T J Trading	5	Email	59	Invalid Protocol, See Evt Log	

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Re-Send

Client

Delete

Exit