

# Front Desk

Practice Management System

## Auto SMS Guide

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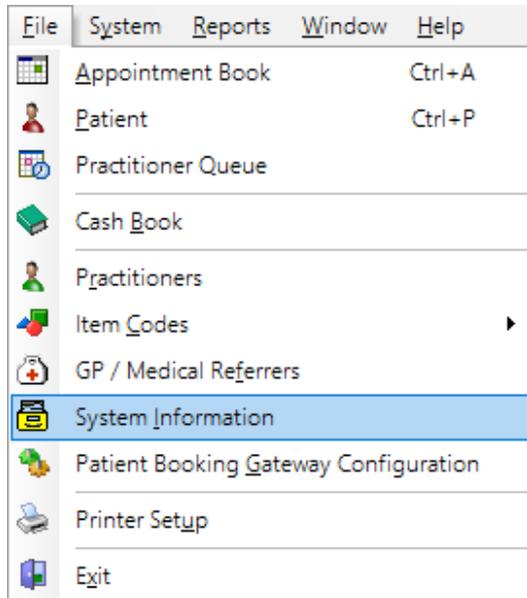
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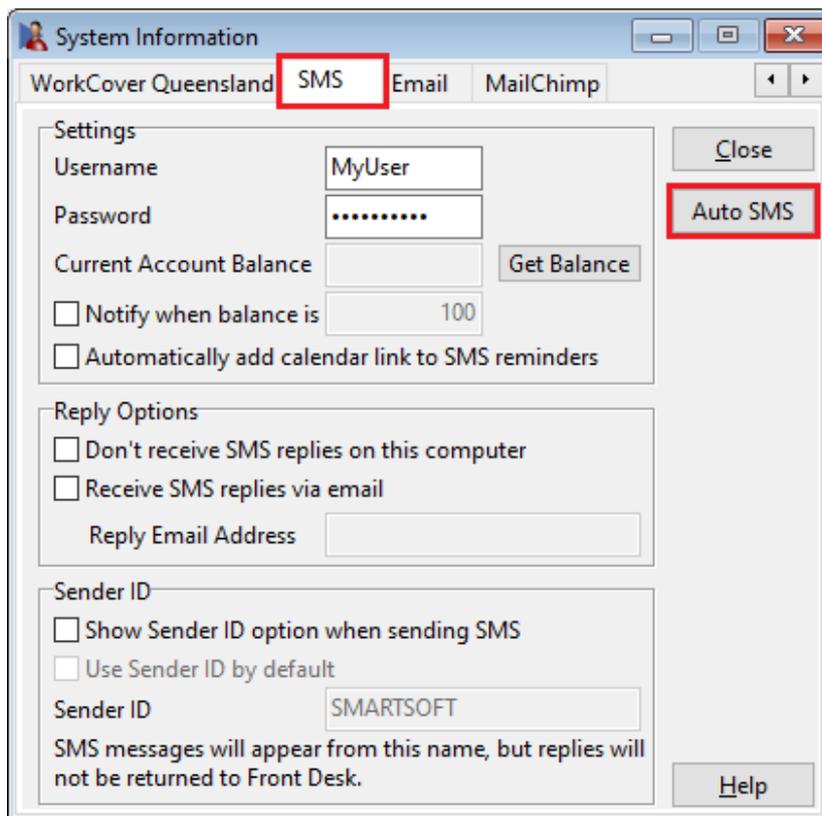
## Step 1 – Enabling Automated SMS Reminders

The Auto SMS functionality in Front Desk will automatically send SMS reminders, based on set rules, for appointments with an **SMS Reminder** flag. Further, should the appointment be rescheduled or cancelled the pending SMS will also be rescheduled or cancelled accordingly.

To enable Automated SMS reminders, login to Front Desk as the 'Admin' user and open **System Information**.



Navigate to the **SMS** tab, then click **Auto SMS**.



The **Automatic SMS Appointment Reminders** dialog will be displayed.

To enable this feature, click **Automatically send SMS appointment reminders**.

Automatic SMS Appointment Reminders

Automatically send SMS appointment reminders

When to send reminders:  
the day before at 11:00 AM

Send additional booking confirmation SMS  
 Only for the following appointment types

Do not send a follow-up reminder if on the same day as the appointment

Do not send any SMS within 1 hour of appointment

SMS Templates

Default Reminder Template  
Appointment Reminder  Add a calendar link to SMS reminders

Default Booking Confirmation Template  
Appointment Reminder  Add a calendar link to SMS reminders

Override templates

Reminder Type	Template	Prac / Group	Appointment Type

By default, the SMS reminders will be sent at a pre-defined time on the day before the appointment. **Please ensure an appropriate Default Reminder Template has been set under SMS Templates, before clicking OK.** This is the template that will be used to send your automated SMS.

SMS Templates

Default Reminder Template  
Appointment Reminder  Add a calendar link to SMS reminders

## Step 2 – Customising Automated SMS Reminders

By default, SMS reminders are set to send automatically the day before the appointment. For most users, no further customisation is required.

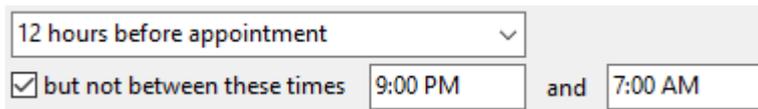
These settings can be customised with the following options:

### When to send reminders:

SMS appointment reminders can be automatically scheduled to send a number of hours before the appointment, on the day before, on the day before excluding Sunday, or on the previous weekday.

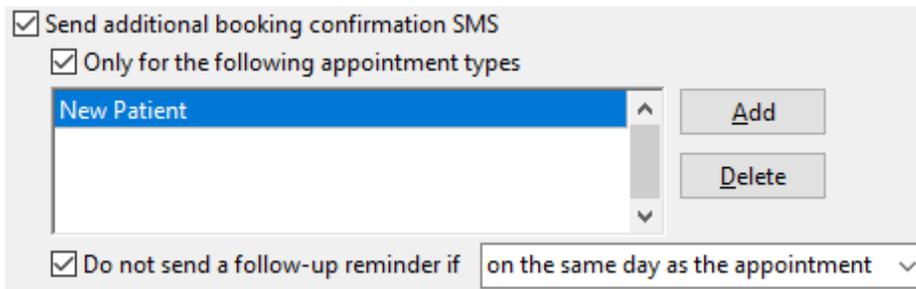
When to send reminders:  
the day before at 11:00 AM

When set to send a number of hours before the appointment, users can also prevent SMS being sent between set times:

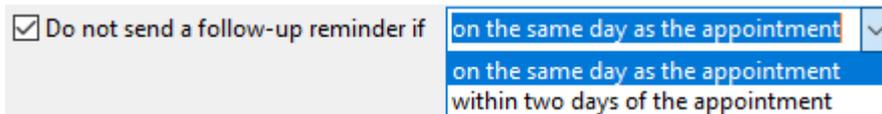


### Send additional booking confirmation SMS

This option will automatically send a booking confirmation SMS to the patient, to be sent shortly after the appointment has been made. If required, this can be set to send only for specific appointment types.



Use the **Do not send a follow-up reminder** option to prevent a follow-up SMS being sent for appointments on the same day, or within two days of the appointment.



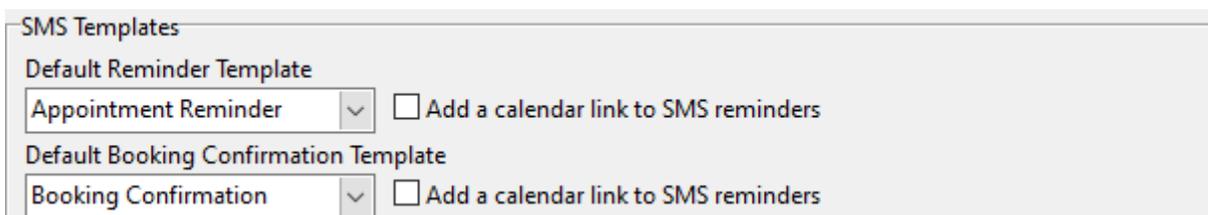
### Do not send any SMS within X hours of appointment

If an appointment has been made for the near future (1-12 hours), this setting will prevent an SMS appointment reminder from being sent.



### SMS Templates

An SMS template can be set as the **Default Reminder Template**, or as the **Default Booking Confirmation Template**. These will be used when sending automated SMS.



Users can also **Add a calendar link to SMS reminders**.

## Override Templates

**Override Templates** can be set if you have specific SMS templates you wish to use for individual **Appointment Types**, **Practice Groups** or **Practitioners**.

Reminder Type	Template	Prac / Group	Appointment Type
Reminder	New Patient Reminder	<<All>>	New Patient

Buttons: Add, Edit, Delete, Up, Down

Click **Add** to create an override.

Edit SMS Template Override

SMS Type: Reminder

Appointment Type: New Patient

Group Appointments

By Practice

Group: Dr Robert Smith Group

Practitioner: Adam Ardvark - Adelaide

SMS Template: New Patient Reminder

Add a calendar link to SMS reminders

Buttons: OK, Cancel

Select whether this template applies to the **Default Reminder** or **Booking Confirmation**.

Reminder

Reminder

Booking Confirmation

Select the appropriate options to apply this override to an **Appointment Type**, and whether this applies to **Group Appointments**.

Appointment Type: New Patient

Group Appointments

If required, filter **By Practice**.

By Practice

Group: Dr Robert Smith Group

Practitioner: Tom Jones - Hazelwood Park

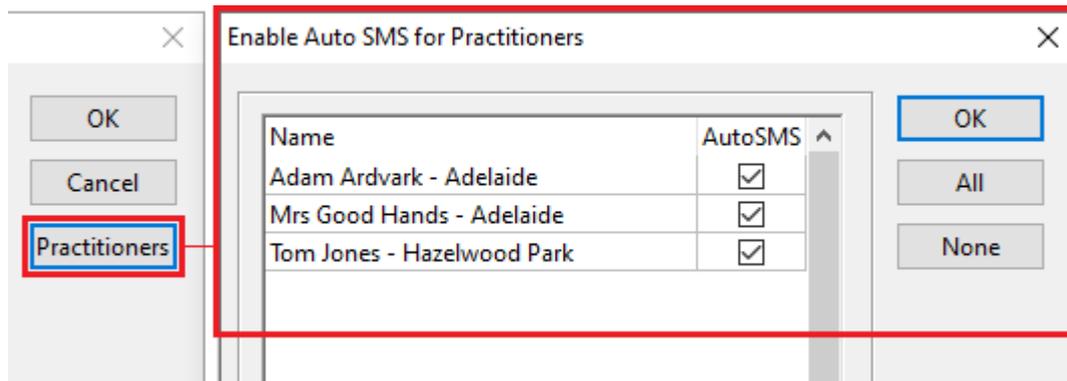
Lastly, select the **SMS Template** to be used and whether to **Add a calendar link to SMS reminders**.

SMS Template: New Patient Reminder

Add a calendar link to SMS reminders

## Practitioners

Click the **Practitioners** button to enable or disable Auto SMS for specific practitioners.



If Auto SMS has been disabled for a practitioner, any patients booked in with that practitioner will not receive automated SMS.

## Frequently Asked Questions

### How does Auto SMS work?

Every 15 minutes, Front Desk will read your appointment book and upload appointment reminder information to the Smartsoft gateway. Any changes to your appointment book will be uploaded at this time:

- If a new appointment has been made, it will be scheduled to send based on your Auto SMS settings.
- If an appointment has been moved, the scheduled time will be updated automatically.
- If an appointment has been deleted, the scheduled SMS will be removed and not sent.

Note: If an appointment has been created or moved **within the period to send SMS reminders**, the SMS will send immediately on the next 15-minute update.

E.g. You have set your SMS appointment reminders to send at 11:00AM on the day before the appointment. If you make an appointment for the **CURRENT** day, it is within this window and will be sent immediately on the next update (every 15 minutes).

### How will I know when my SMS are sent?

Currently, users know an SMS has been sent because the **Appointment Reminder** flag disappears from the appointment:



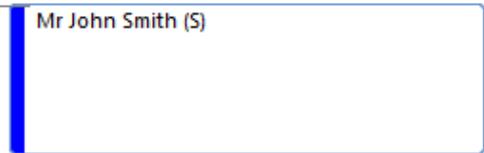
This is mostly unchanged, except a new reminder flag has been introduced to show when reminders are **Queued for Automatic Delivery**. When this flag appears an SMS appointment reminder has been **queued** for delivery:

Queued for Automatic Delivery flag



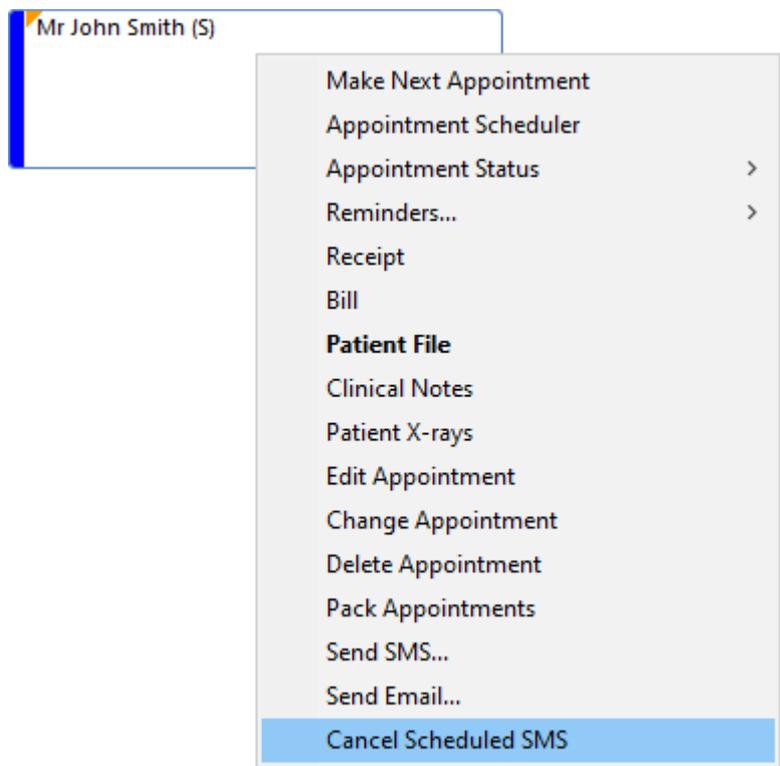
As before, when this flag **disappears** the SMS has been sent, based on your setting on when to send your SMS:

SMS reminder flag has disappeared

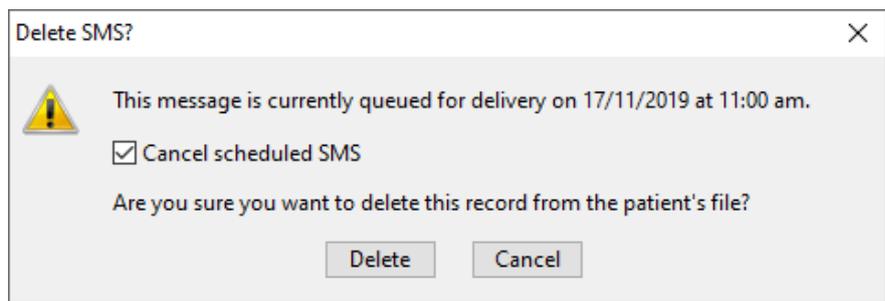


### Can I cancel an SMS that has been queued for delivery?

If an automated SMS has been scheduled for an appointment, the appointment will display the **Queued for Automatic Delivery** reminder flag. The **Cancel Scheduled SMS** option is available when right-clicking the appointment.



Alternatively, when deleting a queued message from the **SMS** tab of a **Patient File** users will have an opportunity to cancel the scheduled SMS.



### Which SMS template will be used?

The **Default Reminder Template** set within the Auto SMS settings will be used for automated SMS reminders.

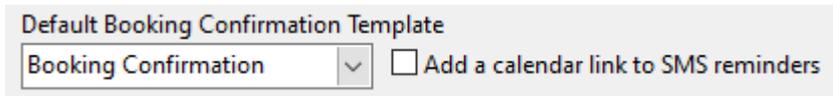


SMS Templates

Default Reminder Template

Appointment Reminder  Add a calendar link to SMS reminders

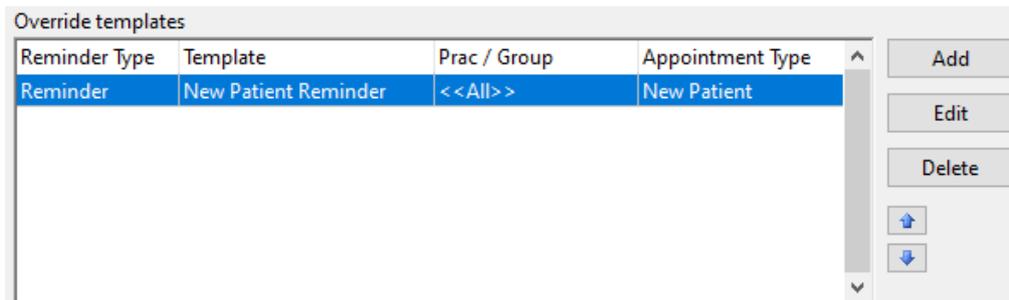
If additional **Booking Confirmation SMS** have been enabled, these will use the **Default Booking Confirmation Template**.



Default Booking Confirmation Template

Booking Confirmation  Add a calendar link to SMS reminders

If **Override Templates** have been configured these will be used instead:



Reminder Type	Template	Prac / Group	Appointment Type
Reminder	New Patient Reminder	<<All>>	New Patient

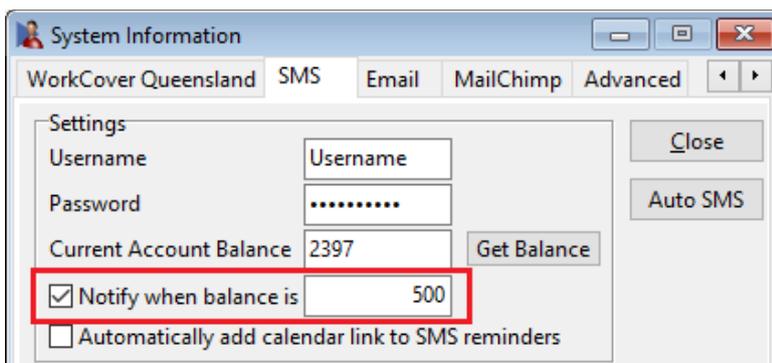
Buttons: Add, Edit, Delete, Up, Down

**It is important that the correct templates have been set before closing and saving this window, otherwise the wrong template may be used.**

### How will SMS credit be deducted for automated SMS?

**Front Desk will automatically upload the next two weeks of appointment reminders, which will be deducted from your available credits.** If you delete an appointment, the scheduled SMS reminder will also be removed and the credit refunded.

As users will no longer be sending SMS manually there are fewer opportunities to see your SMS balance – As such, a balance notification will be enabled by default on the **SMS** tab of **System Information**:



System Information

WorkCover Queensland SMS Email MailChimp Advanced

Settings

Username: Username

Password: .....

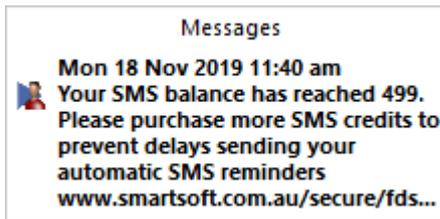
Current Account Balance: 2397

Notify when balance is

Automatically add calendar link to SMS reminders

Buttons: Close, Auto SMS

When your SMS account balance reaches this level, you will receive a notification in the **Messages** section of the **Appointment Book**.



### [Does my computer need to be switched on for SMS to send automatically?](#)

Your computer does **not** need to be switched on for automated SMS to be sent. Your upcoming appointment reminder information will be uploaded to the Smartsoft gateway every 15 minutes, and will be forwarded by Smartsoft to the mobile provider at the appropriate time.

This means your computers can be switched off and the message will still be sent.

### [Can I still send SMS manually?](#)

By enabling automated SMS your appointment reminders will be sent automatically, and do not need to be sent manually. That said, this does **not** prevent you from sending SMS manually. Sending SMS manually, while Auto SMS is enabled, could result in the patient receiving multiple appointment reminders.

## **SMS Resources**

The following resources relate to the general use of SMS integration in Front Desk:

- [Creating SMS and Email Templates in Front Desk](#)
- [Automatically confirming appointments from SMS replies](#)
- [Using 'Add to Calendar' links in SMS reminders](#)
- [Adding an image to SMS 'Add to Calendar' links](#)
- [Front Desk – Letters tags for use in SMS](#)
- [Sending Holiday Greetings by SMS](#)
- [Sending bulk SMS manually](#)