

Setting Up Automatic SMS/Text Messaging.

Setting the System to Send SMS's

1. Go to *Settings->System Configuration*
2. To send birthday messages select Yes from the "Send Birthday SMS texts:" list. Set it to No to not send texts.
3. Choose a number from the "Reminder SMS Texts Frequency" list. This is how many days must be between when the appointment was made or edited and the appointment itself before a text is sent. E.g. The default setting of 7 means that if an appointment was made or edited more than 7 days before the appointment occurs, then a reminder will be sent. This is to avoid sending messages to people who have just booked an appointment a few days before.

If this is set to Never, no messages will ever be sent. 0 will always send messages regardless of when the appointment was made. Other numbers will set the gap in days between making/editing and the actual appointment that triggers a message to be sent.

4. Click Save to save any changes.

Set Your SMS Message Content.

5. Go to *Settings->SMS Messages*
6. Set your birthday message. If you want to include the person's first name put %%name%% in the text where you want it and the system will insert it automatically.
7. Click Update under the Birthday message to save any changes.
8. Set your reminder message. You can use %%name%% in the message to insert the patient's first name and %%appt%% to insert the appointment time e.g. 4pm.
9. Click Update under the Reminder Message boxes to save any changes (you may have to scroll down to see the button).

Credit Your SMS Account.

10. Next add credit to your account. To do this you need the email address that you subscribed to iconpractice with and the password in the SMS password box on SMS Settings page.
11. Click on the link under the heading "SMS Control Panel", or if your pdf reader allows, click this link here:
<http://clearhealthmedia.transmitsms.com/>
12. Once you have logged in click the BILLING link in the top right of the screen.
13. Then click Add Card in the bottom right corner

14. Complete the fields and then click Add Card.
15. Then click Add Credit.
 - a. Select the Credit Amount. We suggest you do the \$20 amount to minimise the \$1 processing fee charged by the SMS supplier.
 - b. Check the Credit Card is the correct one if you have added more than one card.
 - c. Click Add Credit.
16. You can then set the account to Auto Credit Re-charge under Billing Settings if you wish. Setting this means you will not have to repeat this process each time you need credit, and will stop your SMS messaging service being suspended due to insufficient funds. We recommend you do set this.
17. Set Send Balance Warning if you wish, though if you have auto recharge set then it is not usually necessary.
18. Click Update to save changes.
19. You can now log out. Your system should now be set to send messages according to the preferences you set in the System Configuration.