

SMS from Report Wizard

24/10/2024 12:31 pm BST

Summary

The Report Wizard screen is used to collate data from the database based on various user-defined criteria. The clients who meet the specified criteria can then be contacted by various channels including SMS.

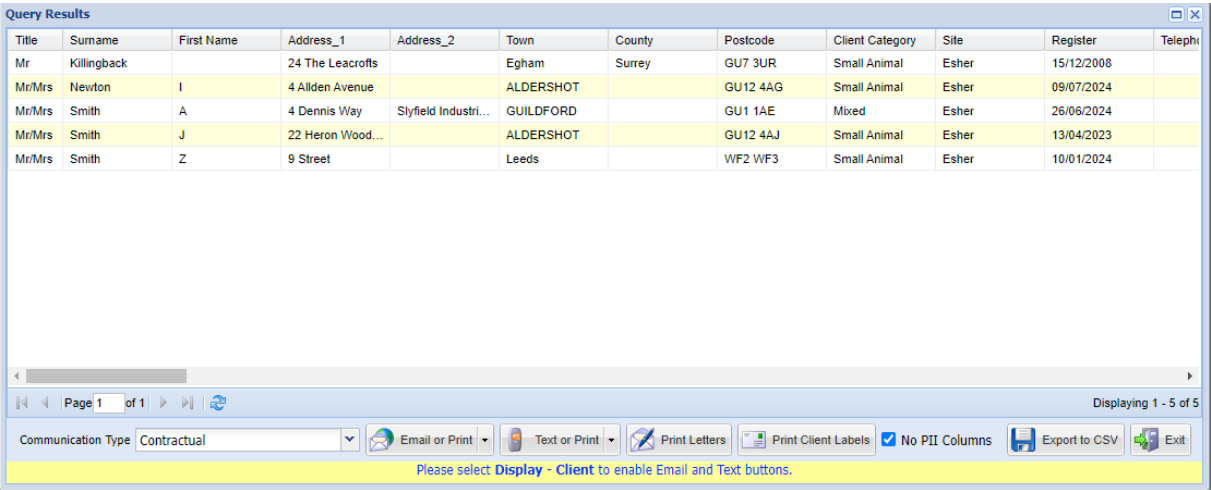
For example, a bespoke report can be generated to contact specific clients during promotional/marketing periods such as a practice carrying out free Geriatric Nurse Clinics to all dogs over the ages of 7, sending information regarding Rabbit Awareness Week and top tips on Bonfire Night etc.

For further information see: [Report Wizard](#)

Details

Sending SMS from Report Wizard

1. Enter the Report Wizard screen (Utilities > Reports > Report Wizard Tab).
2. Specify your criteria and select 'List' (For further information see: [Report Wizard](#)).
3. The clients/patients that meet the specified criteria are displayed.



Title	Surname	First Name	Address_1	Address_2	Town	County	Postcode	Client Category	Site	Register	Telephone
Mr	Killingback		24 The Leacrofts		Egham	Surrey	GU7 3UR	Small Animal	Esher	15/12/2008	
Mr/Mrs	Newton	I	4 Allden Avenue		ALDERSHOT		GU12 4AG	Small Animal	Esher	09/07/2024	
Mr/Mrs	Smith	A	4 Dennis Way	Slyfield Industri...	GUILDFORD		GU1 1AE	Mixed	Esher	26/06/2024	
Mr/Mrs	Smith	J	22 Heron Wood...		ALDERSHOT		GU12 4AJ	Small Animal	Esher	13/04/2023	
Mr/Mrs	Smith	Z	9 Street		Leeds		WF2 WF3	Small Animal	Esher	10/01/2024	

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Displaying 1 - 5 of 5

Communication Type: Contractual

Email or Print | Text or Print | Print Letters | Print Client Labels | ☒ No PII Columns | Export to CSV | Exit

Please select Display - Client to enable Email and Text buttons.

4. Select 'Text or Print' and this will provide two options of 'Text Only' or 'Text & Generate Letter for Missing'.

Option 1: Text Only

This option will send an SMS to all clients generated on the report, providing they have a stored mobile number in their Client Details.

Once selected, the below window will appear. This screen allows you to select an SMS template or free text an SMS message with Data Fields to send to clients.

SMS Text Editor

Enter the Text you wish to send

Compose Ad-Hoc SMS

Number of Characters Entered: 0
Practice set limit: 611

SMS Length Information

Warning: Long SMS messages may incur multiple charges; Please use the below as a guide only to SMS standards.

A single SMS will be sent up to 160 characters.

Over 160 characters messages are split into 153 character segments. Charges apply per segment.

The following characters count as 2 characters in the SMS standard: " ^ { } [] ~ \ ? | "

Available Data Fields

- Address1
- Address2
- Address3
- AddressOO
- Age
- AllAnimals
- Allergies
- AnimalAge
- AnimalDOB
- AnimalId
- AnimalName
- AnimalNotes
- AnimalRegisterDate
- AnimalStatus
- Animal_DateOfBirth
- Animal_Name

Add Field

Available SMS Templates

Hi, As Rabbit Awareness Week is approach our vet nurses! Please contact the practice

Wishing S{AnimalName} a Happy Birthday

Communication Type: Contractual

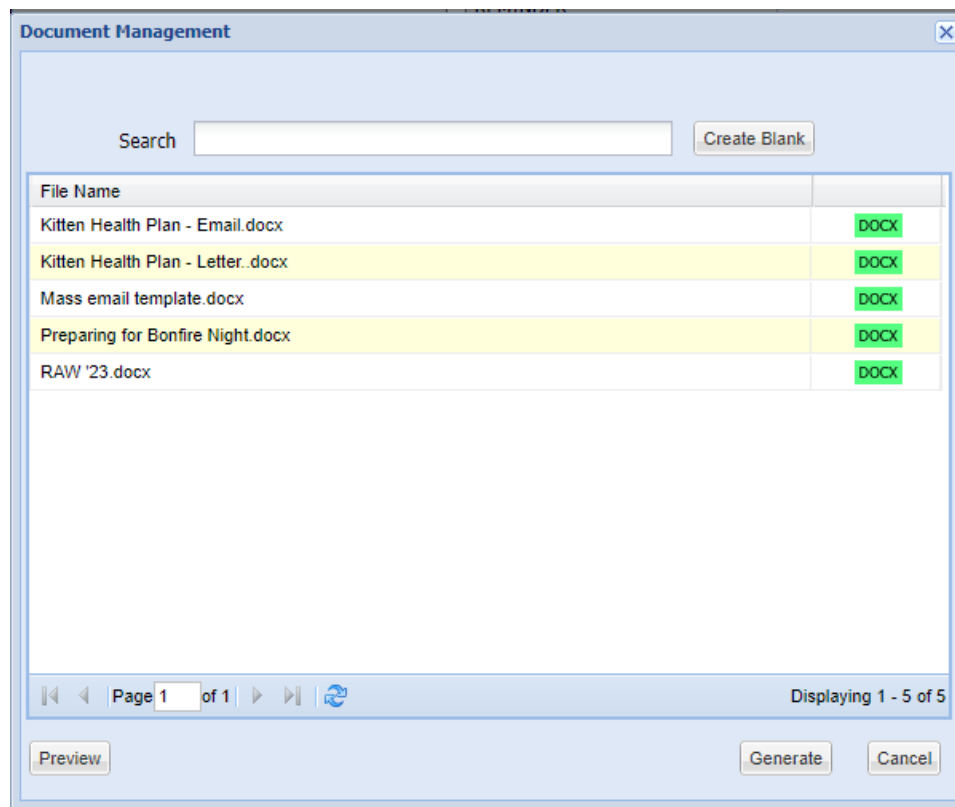
Cancel Send

Option 2: Text & Generate Letter for Missing

This option will send an SMS message to all clients with a stored mobile number and generate a letter for any clients who do not have a stored mobile number.

Selecting either option will display the same screen as pictured above.

1. Enter a message into the field provided, or select a template from the 'Available SMS Templates' section. (For information on creating SMS templates see: [SMS Administration](#))
2. To send the SMS select 'Send'.
3. SMS messages will be sent. Any clients with invalid mobile numbers will be displayed. If you selected Option 1, the sending of SMS is now complete. If you selected Option 2, see below.
4. Once SMS messages have been sent, the below window will appear, prompting you to select a Template to print for clients with no mobile number stored.



5. Once the template has been selected and 'Generate' has been selected, the template will print.