



Appointment Reminder Improvements

New Feature Documentation

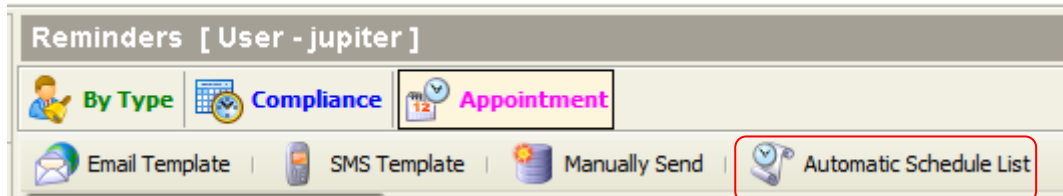
What does it do?

We have simplified the Appointment Reminder Scheduler in 2.7 by using a similar interface to the scheduler used for Compliance Reminders.

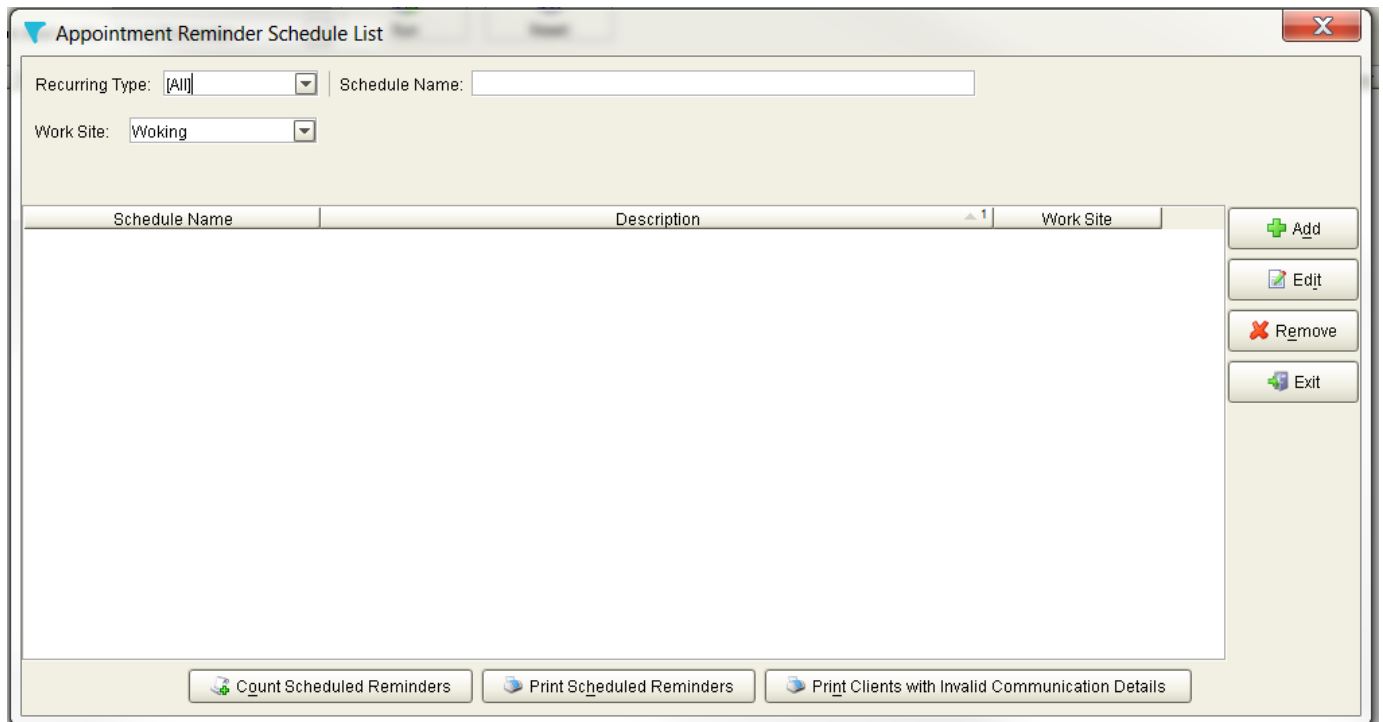
The Appointment Reminder Scheduler allows you to send SMS and Email reminders to clients regarding their appointments via an automated scheduled task.

How do I use it?

The Appointment Reminder Schedule can be accessed via the Reminders screen. Select Reminders from the main menu and select the Appointment Icon. You will then see an option called 'Automatic Schedule List'.



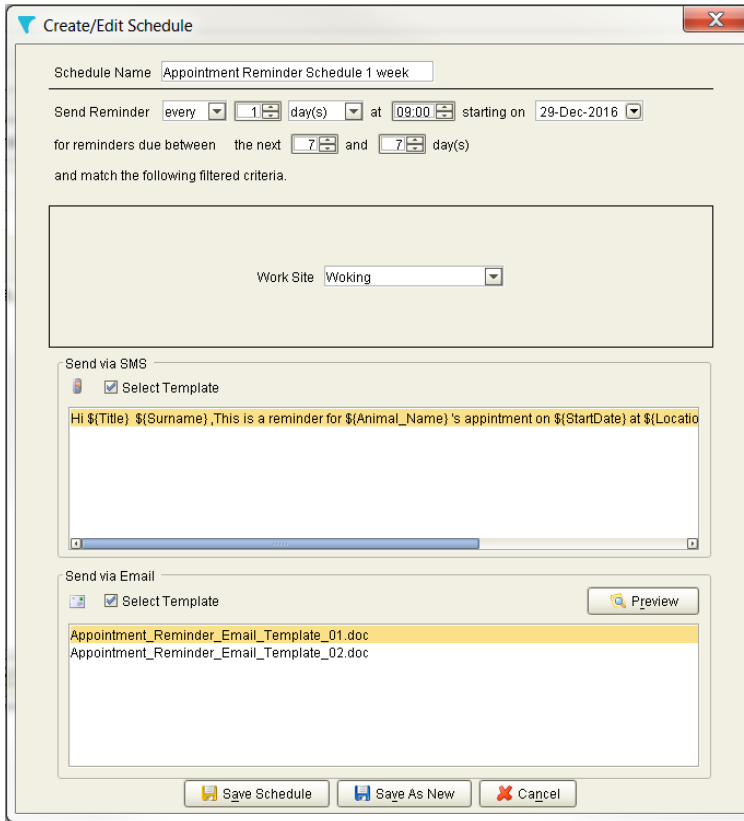
This will display the Appointment Reminder Scheduler which will display all scheduled tasks.



Creating a Scheduled Task

To add a new task, select 'Add' from the right-hand side menu. This will display the Create/Edit Schedule window:

The first step is to enter a name for your schedule. Once this has been done, follow the configuration flow, additional guidance has been provided below:



Field	Description
Schedule Type	Allows "every" or "once". Defines if it is a reoccurring schedule or a one off.
Frequency	Combination of number and type, this allows configuration by number of days or weeks.
Run Time	The time the schedule will start to run during day that the schedule runs.
Start Date	The schedule will only start to run on and after the selected date.
Catchment Day(s)	The number of days from the running date to send reminders for. Example: Setting both values to 1 and the scheduler runs today, will send reminders due tomorrow.
Work Site	Define which site the schedule applies to. If applying to all sites, select [All] from the drop down list.

Send via SMS/Send via Email

Once you have defined the schedule requirements, the next step is to select the templates required for SMS and Email if required, you must select at least SMS or Email by ticking "Select Template" if neither is selected the schedule will not send any reminders. The schedule can send both communication types at the same time therefore selecting both options and the relevant template is possible.

Templates

The SMS templates and Email Templates are created from Utilities > SMS, there are 2 buttons available, "Email Template" and "SMS Template". Any templates added here are selectable from the Scheduler.

Save Options

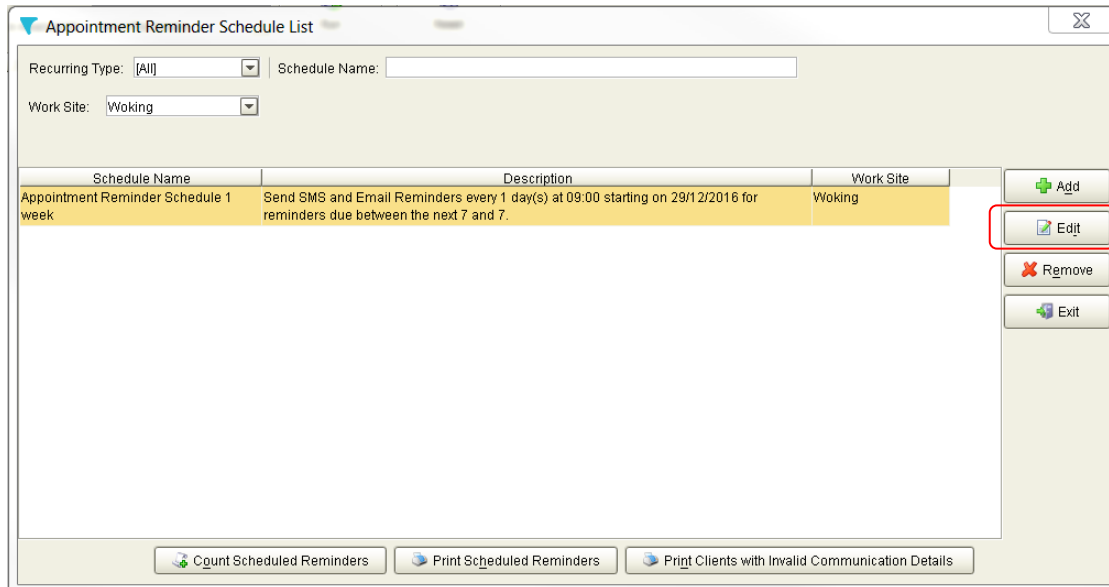
To save your schedule click the Save Schedule button, if you now want to make a similar schedule to the one just created, open the schedule by selecting Edit from the schedules window, rename the schedule and make any changes such as another work site and select "Save As New". This will create an almost identical schedule.

Please note:

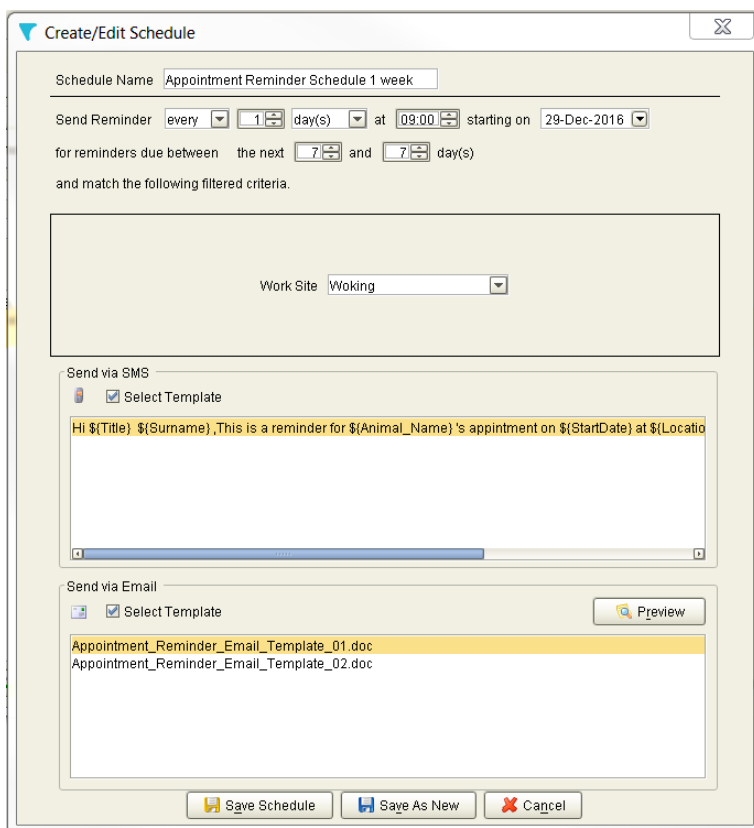
This feature requires that the scheduler service "Voyager Comms Service" is configured by our engineers before the schedules will automatically run. If you are unsure that this has been setup, then please contact support.

Editing a Scheduled Task

Once the task has been saved it will show in the Appointment Reminder Schedule List. To edit the task, select the task from the list and select 'Edit' or double click the task from the list.



This will open the Create/Edit schedule window which allows you to modify the existing task.

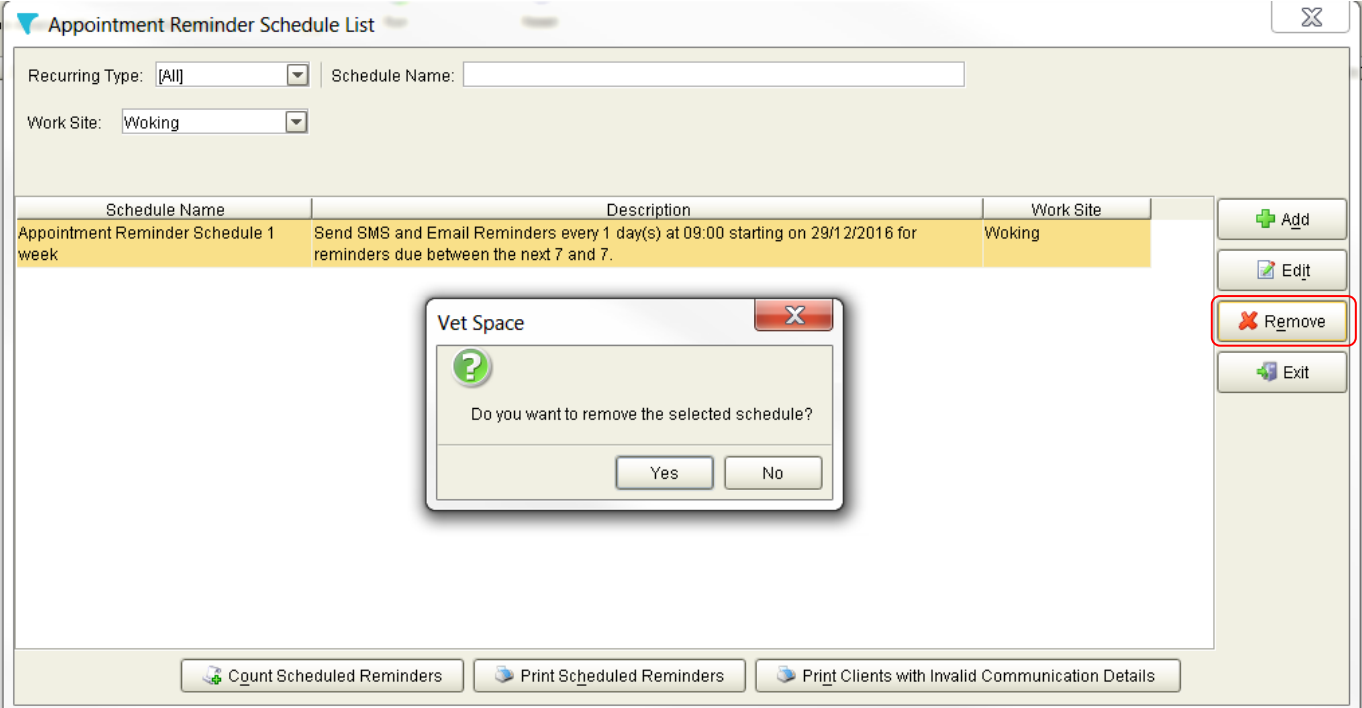


Once modified you have 3 options:

Field	Description
Save Schedule	Overwrites and saves the existing task.
Save as New	Does not overwrite existing task, Saves task as new. This option requires you to enter a new Schedule Name.
Cancel	Cancels changes and does not save.

Deleting a Scheduled Task

To delete a task, select a task from the list and select the 'remove' option from the right-hand side menu.



The screenshot shows the 'Appointment Reminder Schedule List' window. At the top, there are filters for 'Recurring Type' (set to [All]) and 'Work Site' (set to Woking). Below the filters is a table with the following data:

Schedule Name	Description	Work Site
Appointment Reminder Schedule 1 week	Send SMS and Email Reminders every 1 day(s) at 09:00 starting on 29/12/2016 for reminders due between the next 7 and 7.	Woking

To the right of the table is a vertical menu with buttons: '+ Add', 'Edit', 'Remove' (highlighted with a red box), and 'Exit'. A modal dialog box titled 'Vet Space' is open in the center, asking 'Do you want to remove the selected schedule?' with 'Yes' and 'No' buttons.

At the bottom of the window, there are three buttons: 'Count Scheduled Reminders', 'Print Scheduled Reminders', and 'Print Clients with Invalid Communication Details'.

What if I don't want to use this feature?

This feature only works when schedules have been created and the Voyager Comms Service has been setup. Without this service or any tasks created the system will not send any reminders.