

# Appointment Reminders Automatic Schedule

24/07/2025 2:57 pm BST

## Summary

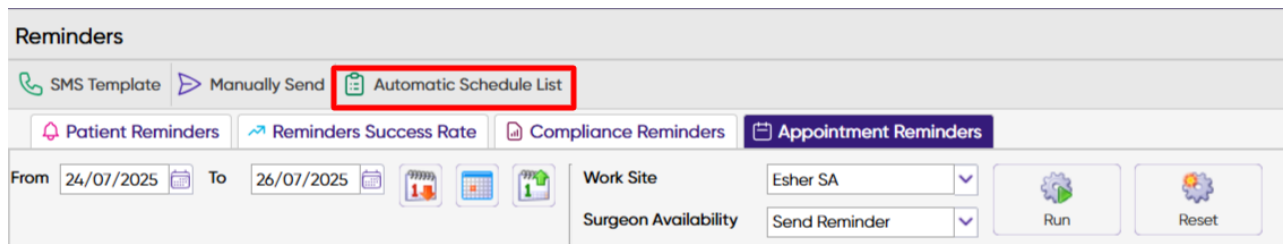
Appointment Reminders can be setup to send out on an automated schedule. The Appointment Reminder Scheduler allows you to send SMS and Email reminders to clients regarding their appointments via an automated scheduled task.

## Details

### Using the Appointment Reminder Scheduler

The Appointment Reminder Scheduler can be accessed via the Reminders screen.

1. Select Reminders from Comms > Reminders.
2. Select the 'Appointment Reminders' tab.
3. Select the 'Automatic Schedule List' button.



The screenshot shows the 'Reminders' interface. At the top, there are three buttons: 'SMS Template', 'Manually Send', and 'Automatic Schedule List'. The 'Automatic Schedule List' button is highlighted with a red rectangular box. Below these buttons, there are four tabs: 'Patient Reminders', 'Reminders Success Rate', 'Compliance Reminders', and 'Appointment Reminders'. The 'Appointment Reminders' tab is currently selected. Below the tabs, there are two date pickers: 'From' (set to 24/07/2025) and 'To' (set to 26/07/2025). To the right of the date pickers, there are two dropdown menus: 'Work Site' (set to 'Esher SA') and 'Surgeon Availability' (set to 'Send Reminder'). At the bottom right, there are two buttons: 'Run' and 'Reset'.

4. The 'Appointment Reminder Schedule List' window will display.

### Create an Appointment Reminder Scheduled Task

1. Open the The 'Appointment Reminder Schedule List' window.
2. Select 'Add' from the right-hand side menu and the 'Create/Edit Schedule' window will display.
3. Enter a Schedule Name for your scheduled task.
4. Enter your schedule details.

Create / Edit Schedule

Schedule Name
Appointment Reminders

Send Reminder
every
1
day(s)
at
09:00
starting on
24/07/2025

for reminders due between
the next
2
and
2
day(s)

and match the following filtered criteria.

Work Site
Esher SA

Client Site
[All]

Reminder Type
[All]

Treatment Type
[All]

Client Category
[All]

Patient Category

Species
[All]

Breed
[All]

Send via SMS

☒

Select Template

Dear \${ClientName}, \${Animal\_Name} has an appointment on \${AppointmentDate}. If you are unable to attend please call the practice on \${SitePhone}

Send via Email

☐

Select Template

Appointment Reminder Template.docx

Communication Type
Contractual

Save Schedule

Save As New

Cancel

1. Type in the Schedule Name.
2. Set how often you would like Merlin to send Appointment Reminders, what time they will send and also a start date.
3. 'for reminders due between the next X and X day(s)' - This is how much notice you wish to give to clients. In the screenshot example above, an SMS and/or email will automatically send to the client 2 days before their appointment.
4. Select the Communication Channels and templates you wish to use:

*Note: The mergefield {AppointmentDate} also includes the appointment time.*

Send via SMS = Tick the checkbox and select the SMS Template you want to use.

Send via Email = Tick the checkbox and select the Document Template you want to use.

6. Select 'Save Schedule' to create the scheduled task.

## **Editing a Scheduled Task**

1. Open the The 'Automatic Schedule List' window.
2. Select the task you wish to edit.
3. Select 'Edit'.
4. The Create/Edit Schedule window appears, which allows you to modify the existing task.
5. Once modified, select 'Save Schedule'.

## **Deleting a Scheduled Task**

1. Open the The 'Automatic Schedule List' window.
  2. Select the task you wish to delete.
  3. Select 'Remove'.
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