

SMS Administration

25/07/2025 9:37 am BST

Summary

SMS messaging is used within the system to communicate with clients in the following areas: Diary, Appointment Reminders, Patient Reminders, Compliance Reminders, Reception and Report Wizard.

Details

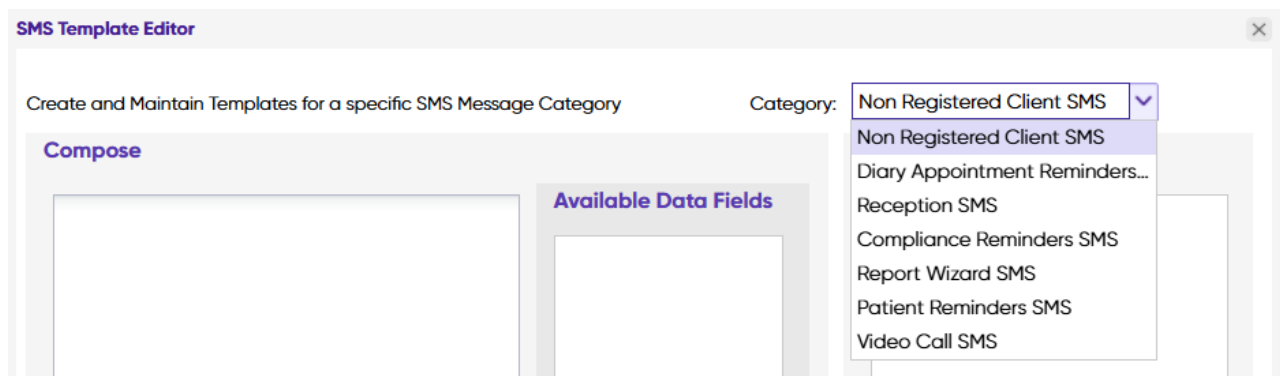
Email and SMS messaging are an additional add-on to Merlin. For more information please contact your RCM or use our the Support Ticket System via Merlin.

SMS Templates

An SMS Template allows pre-written messages to be sent to clients on an individual basis or as a group. Creating templates speeds up the SMS process and allows for accurate spelling and grammar which may be overlooked in a rapidly typed message.

Adding an SMS Template

1. Open the SMS Template Editor (Administration > SMS Messaging > SMS Templates).
2. Select the relevant area from the Category drop down box.



The screenshot shows the 'SMS Template Editor' window. At the top, it says 'Create and Maintain Templates for a specific SMS Message Category'. On the right, there is a 'Category:' label followed by a dropdown menu. The dropdown is open, showing a list of categories: 'Non Registered Client SMS' (which is highlighted), 'Non Registered Client SMS', 'Diary Appointment Reminders...', 'Reception SMS', 'Compliance Reminders SMS', 'Report Wizard SMS', 'Patient Reminders SMS', and 'Video Call SMS'. On the left side of the editor, there is a 'Compose' section with a large text area. To the right of the 'Compose' section is an 'Available Data Fields' section, which is currently empty.

3. Once selected, use the 'Compose' text box on the left hand side to create your message along with the 'Available Data Fields'.

Category:

Message 2: " Hi Mrs Jenkins".

- SMS Template Editor

Create and Maintain Templates for a specific SMS Message Category

Category: Patient Reminders SMS

Compose

Hi \${ClientName}, \${AnimalName} is now due their booster on \${CV_Date}. Please call us on 123456789 to get booked in.

Number of Characters Entered: 118
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

AllAnimals

AnimalAge

AnimalId

AnimalName

AnimalRegisterDate

AnimalStatus

Breed

BreedId

Business2Address1

Business2Address2

Business2Address3

Business2City

Business2Code

Existing Templates

Hi \${ClientName}, \${AnimalName} is now get booked in.

\${AnimalName} is now due their booster

Hi \${ClientName} , \${AnimalName} is over an appointment.

Clear

Save as New

Update

Delete

Exit

1. Select the relevant Category via the drop-down list.
2. Select a template from the 'Existing Templates' list.
3. The text will load into the top left text box.
4. Edit the text/Data Fields as required.

5. Select 'Update' and this will overwrite the previous text template.

Delete an SMS Template

1. Select the relevant Category via the drop-down list.
2. Select a template from the 'Existing Templates' list.
3. The text will load into the top left text box.
4. Select 'Delete' and this will permanently delete the template.

Please note - If this template is in use on an Automatic Scheduler, you will need to remove this as the first step, and then delete from the SMS Template Editor window.

Review Messages Sent

The 'Review Messages Sent' menu is accessed via (Administration > SMS Messaging > Review Messages Sent). This screen displays all sent SMS messages with their delivery status (sent/not sent) for the dates specified.

Note: Due to the number of SMS text messages sent through, the delivery status may take up to 72 hours to show as received.

Please allow 3 days for the system to update and review the success rate of sent messages.

Viewing Messages Sent

1. Navigate to (Administration > SMS Messaging > Review Messages Sent.)
2. Specify the dates you wish to view.

SMS Message History						Activities	Administration
Start Date:	20/07/2025	End Date:	26/07/2025				
Date Sent	Site	Sent To	Message	Status	Delivered		

A list will display of all SMS messages sent between the date range and include details of who they were sent to, the contents of the message and if the delivery was successful.