

SMS from Report Wizard

25/07/2025 9:40 am 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.

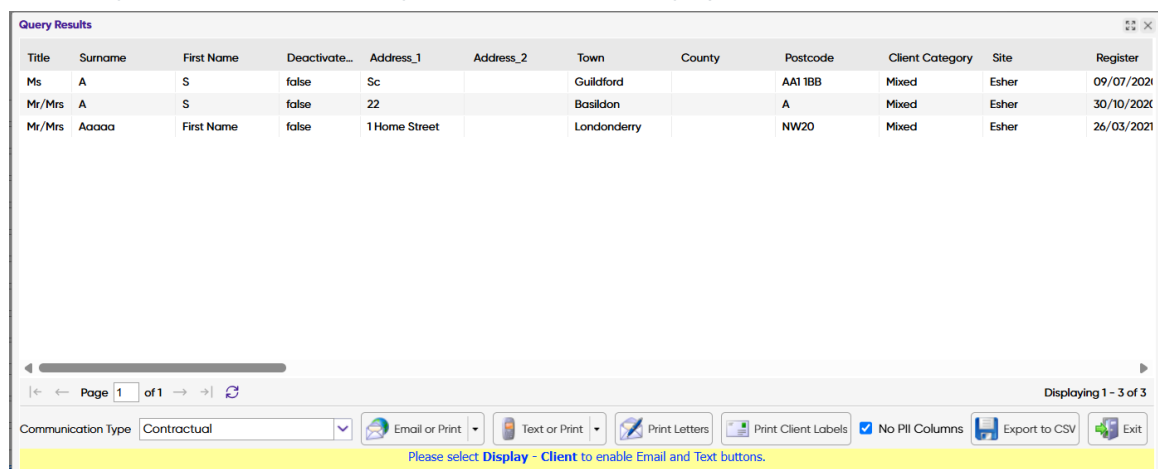
For example, a bespoke report can be generated to contact specific clients during promotional/marketing periods such as a practice carrying out free Geriatric Nurse Clinics to all dogs over the ages of 7, sending information regarding Rabbit Awareness Week and top tips on Bonfire Night etc.

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	Deactivate...	Address_1	Address_2	Town	County	Postcode	Client Category	Site	Register
Ms	A	S	false	Sc		Guildford		AA1 1BB	Mixed	Esher	09/07/2021
Mr/Mrs	A	S	false	22		Basildon		A	Mixed	Esher	30/10/2021
Mr/Mrs	Aaaaa	First Name	false	1 Home Street		Londonderry		NW20	Mixed	Esher	26/03/2021

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
- BloodType

Add Field

Available SMS Templates

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

Wishing \${AnimalName} a Happy Birthday

Dear \${ClientName} , Thank you for visiting to tell us about your experience. Many Th

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.

Document Management

Search

Create Blank

File Name	
Kitten Health Plan - Email.docx	DOCX
Kitten Health Plan - Letter.docx	DOCX
Mass email template.docx	DOCX
Preparing for Bonfire Night.docx	DOCX
RAW '23.docx	DOCX
Senior Wellness Month.docx	DOCX
Test Report Wizard.docx	DOCX

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Preview

Generate

Cancel

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