

How to Setup SMS Confirmations

Summary:

The Appointment Confirmation feature allows you to centrally manage appointment confirmations. Confirmation Manager will automatically create an appointment confirmation list from the Appointment Book. You can then send confirmation requests via SMS to client's mobile phones or call clients directly from the confirmation list.

This document will guide you through the steps of configuring Shortcuts so you can send confirmation requests via SMS.

Article Applies to: Shortcuts 7.3+

Related Articles: SMS Overview & Definitions

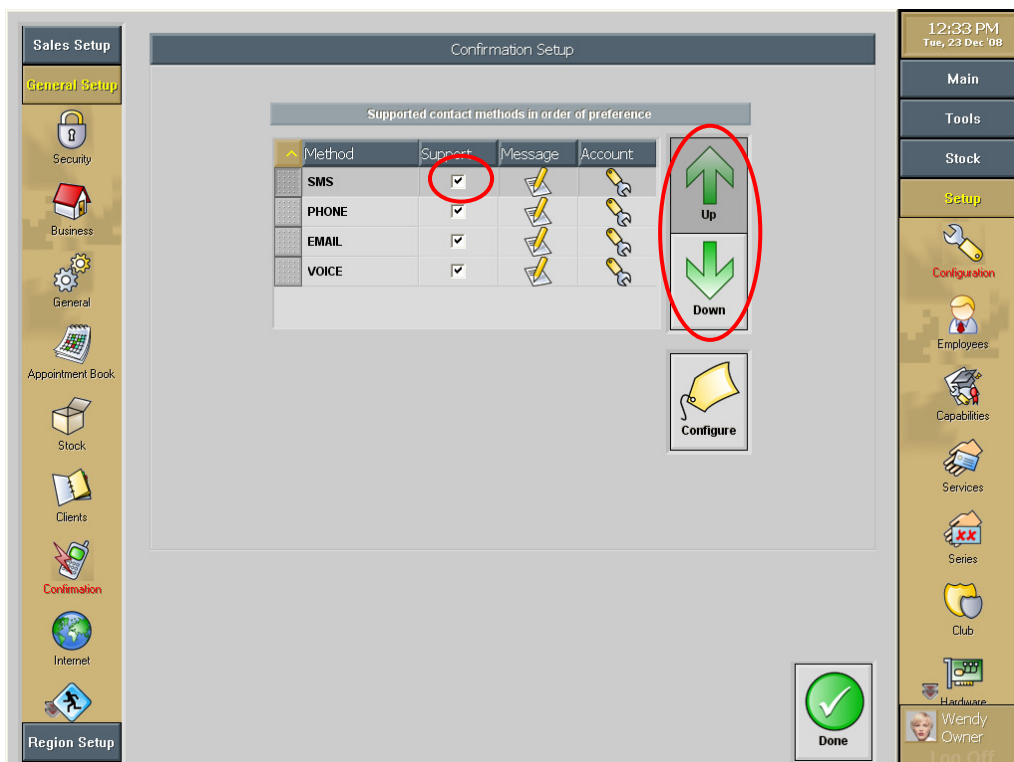
Step 1: Internet Account

In order for Shortcuts to support SMS (short message service), you must have a broadband internet account. If you do not have an internet account setup on your computer, you will need to arrange to sign up with an Internet Service Provider (ISP).

Connect to the Internet; ensure you can successfully browse the web.

Step 2: Confirmation Setup

1. Click on the **Setup** menu in the Navigation bar, then click the **Configuration** icon. The Configuration bar will appear on the left-hand side of the screen.
2. Click on the **General Setup** menu in the Configuration bar, then click the **Confirmation** icon. The Confirmation Setup screen will appear.
3. All active (ticked) confirmation methods will be used. To specify a priority for which confirmation methods will be used first, click to select the relevant confirmation method, then use the **Up** and **Down** buttons to move them into the correct order. For example, if you wanted SMS to be the first confirmation method, followed by Phone, move the SMS method to the top, then put Phone as the second.



Selecting and Configuring Contact Method: SMS

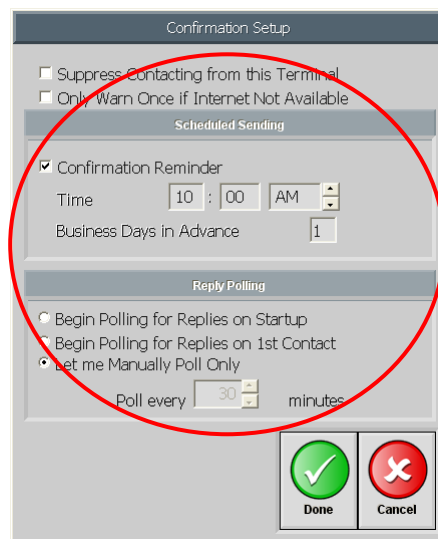
1. Tick the support option for **SMS**. A message will appear stating that "SMS cannot be used until it has been properly configured. Configure now?"
2. Click the **Yes** button. Another window will appear stating that it may take a bit of time to contact the SMS provider.
3. Click the **Done** button. The Setup Account Details window will appear.



4. The SMS service in Shortcuts is called TextME. If you do not already have a TextME account, click the **Sign Up** button. A TextME web page will appear. Follow the on screen instructions to sign up for an account.

Once you have a TextME account, type in your Username and Password into the appropriate fields. Please note the Username and Password are both case sensitive.

5. Click the **Done** button to return to the Confirmation Setup screen.
6. Click on the **Configure** button. The Confirmation Setup window will appear.



7. If you do not wish to use the SMS Confirmation feature on this terminal (in the event you have multiple terminals), tick the **Suppress Contacting from this Terminal** option.
8. If you will only want to receive one warning if the Internet is not available when you try to send SMS confirmations, tick the **Only Warn Once if Internet Not Available** option.
9. If you want Shortcuts to remind you to send SMS confirmations, tick the **Confirmation Reminder** option, then enter the desired time for the reminder into the Time fields. Finally, click on the Business Days in Advance field and enter the number of days into the future you would like to be prompted for (minimum 1).

As an example, if you entered 10am into the Time fields, and 1 day into the Business Days in Advance field, at 10am each day, a reminder window will popup in the Appointment Book prompting you to send out confirmation reminders for all appointments tomorrow (or the next business day, if tomorrow is a non-business day).

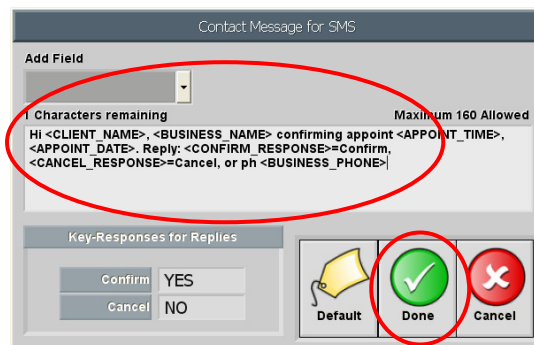
10. Choose one of the following Reply Polling methods:

- **Begin Polling for Replies on Startup** (startup of Shortcuts)
When this option is selected Shortcuts will automatically poll/check for SMS replies when Shortcuts loads. Once Shortcuts is loaded it will continue to check for replies automatically throughout the day.
- **Begin Polling for Replies on 1st Contact**
Shortcuts will automatically connect to the internet and poll for replies from the time the 1st SMS is sent (when the Contact button is pressed). By default, Shortcuts polls/checks for SMS replies every **30 minutes**. If you do not want Shortcuts to check for replies that often you can adjust the number of minutes by using the up and down arrow keys.
- **Let Me Manually Poll (Recommended)**
This allows you to check for replies at anytime by clicking the Check Reply button on the Confirm Screen. When this option is selected Shortcuts will not automatically poll/check for SMS replies.

11. Click the **Done** button to close the Confirmation Setup window.

12. Click the **Message** icon next to the SMS contact method. The Contact Message for SMS window will appear and the default message will be displayed.

13. SMS Messages can contain a maximum of 160 characters. If you go beyond 160 characters, two (or more) messages will be sent to the client. Using the keyboard, make any changes required to the SMS confirmation message sent to clients.



You can use custom fields to have Shortcuts automatically insert certain information in the message, such as the client's name or their appointment time. To add a field to the message, click and scroll to select a field from the Add Field drop down list. These fields will be added to the end of the message. The number of characters allocated for each field is displayed in brackets after the field name. Click the Default button if you want to return to the default message.



The default message uses up almost all available characters (147). You will likely need to delete part of the default message in order to modify it. For example, 40 characters are allocated for Business Name. If your business name is shorter than 40 characters, it might be better for you to type the actual business name instead of inserting the field. This allows more characters for the rest of the message.

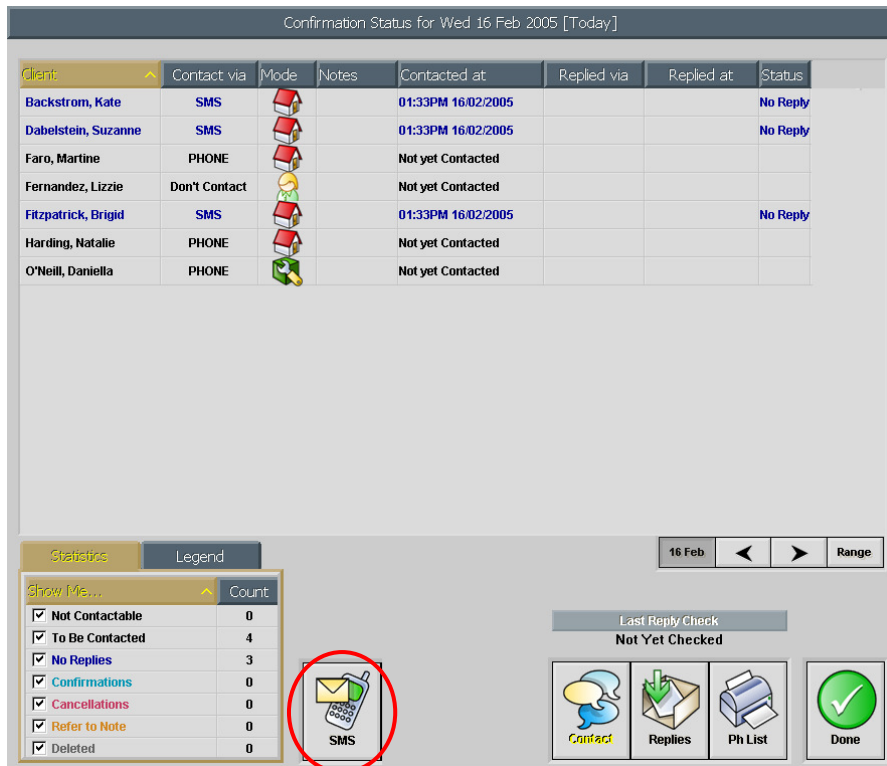
14. Using the keyboard, type in the key responses for replies for confirmation and cancellation. When responses are received via SMS, Shortcuts will search for a response match.

15. Click the **Done** button to close the Contact Message for SMS window.

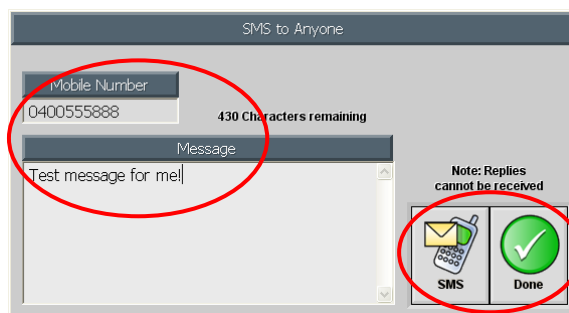
Sending a Test SMS

It is a good idea to try sending a test SMS to yourself to make sure the Confirmation feature is working.

1. Click on the **Main** menu in the Navigation bar, then click the **Appointments** icon. The Appointment Book will appear.
2. Click on the **Menu** button and select the **Confirmation Status** option from the popup menu that appears. The Confirmation Status screen will appear.
3. Click the **SMS** button. The SMS to Anyone window will appear.



4. Type in the mobile phone number into the **Mobile Number** field.



5. Press Tab on the keyboard to get to the **Message** field and type in a message.
6. Click the **SMS** button to send the message.
7. Click the **Done** button to return to the Confirmation Status screen.



Shortcuts will ignore replies made to once-off SMS'es.

Step 3: Internet Configuration screen

The Internet Setup screen allows you to configure internet settings specific to Shortcuts.

1. Click on the **General Setup** menu in the Configuration bar, then click the **Internet** icon. The Internet Setup screen will appear.



Start up Mode:

2. Choose one of the following options for connecting to the Internet via Shortcuts:

- **Always Connected**
Choose this option if you have a permanent Internet connection (e.g. cable) and want Shortcuts to always remain connected to the Internet. Choosing this option will disable the other options related to disconnection on this screen.
- **Auto Connect**
Choose this option if you want Shortcuts to automatically connect to the internet every time you start (open) the Shortcuts program.
- **Wait until Internet is needed** (recommended)
Choose this option if you want Shortcuts to only connect to the internet when required (eg. when you need to send SMS appointment confirmations).

Disconnection Mode:

3. Choose an option for disconnecting from the Internet:

- **Disconnect Immediately when Internet no longer needed**
- **Timeout to Disconnection when Internet no longer needed**
- **Disconnect on Exit** (recommended)
- **Disconnect when Computer is Shutdown**

Step 4: Firewall Settings

If you have a firewall (e.g. Norton Internet Security) installed on your computer, you need to specify certain exceptions in your firewall so Shortcuts can send out SMS messages as some firewalls can block this from happening. Refer to the following file on the Shortcuts website for a complete list of files:

<http://www.shortcuts.com.au/community>

Select the icon **Support Documents**, then select the category **Hardware & Configuration**

For assistance with adding exceptions to your firewall, speak to your hardware technician.