Appointment Reminder-Admin Guide

THIS WIKI HAS BEEN UPDATED FOR VERSION 13 OF YOUR PBX GUI

Overview

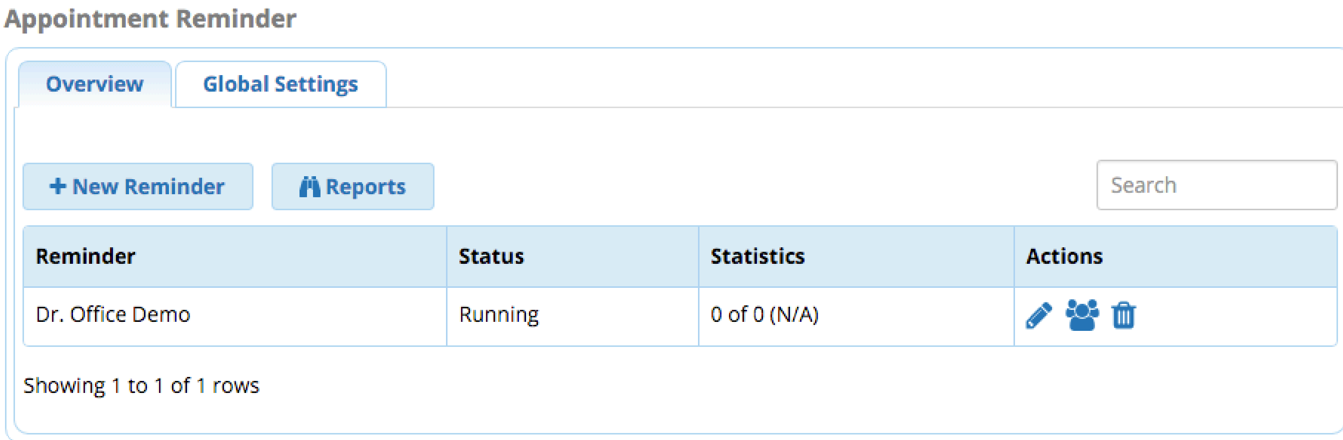
The Appointment Reminder module is a unique way to automate Appointment Reminders. By simply specifying names and numbers to be called, the PBX will automatically call at specified times and allow recipients to confirm, cancel, and reschedule appointments. The module gives you the flexibility to control all details of the calls, from concurrent rates to retry attempts to how many days ahead to notify. You have the ability to load a CSV list of numbers to call, or even add numbers and names manually. On the fly modifications can be made to any Appointment Reminder list.

Appointment Reminders

To navigate to the Appointment Reminder module:

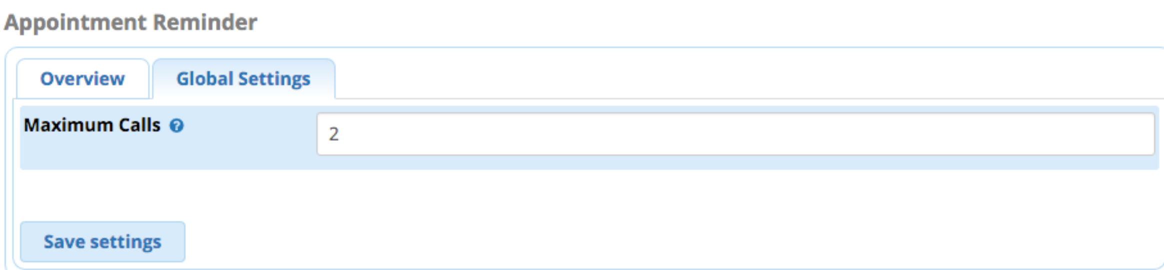
- Click **Applications** in the top menu
- Click **Appointment Reminder** in the drop down

The home screen (**Overview** tab) will show any reminders that have been created.



Global Settings

Click on the **Global Settings** tab.



Maximum Calls

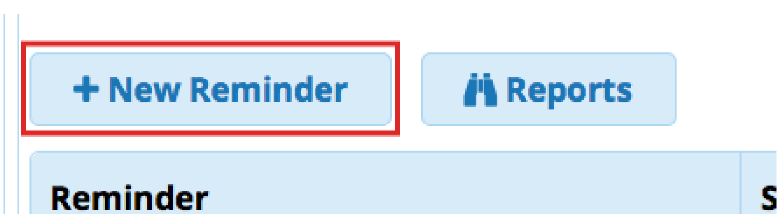
The number of maximum simultaneous calls the system will make.

Save

Click the **Save settings** button to save global settings.

Add a Reminder

Click on the **+ New Reminder** option at the top.



Appointment Reminder

Add Reminder

Name

Enabled: **Yes** | No

Daily Start Time

Sun	Mon	Tue	Wed	Thu	Fri	Sat
09:00	09:00	09:00	09:00	09:00	09:00	09:00

Daily End Time

Sun	Mon	Tue	Wed	Thu	Fri	Sat
17:00	17:00	17:00	17:00	17:00	17:00	17:00

Max Advance Notice: 3

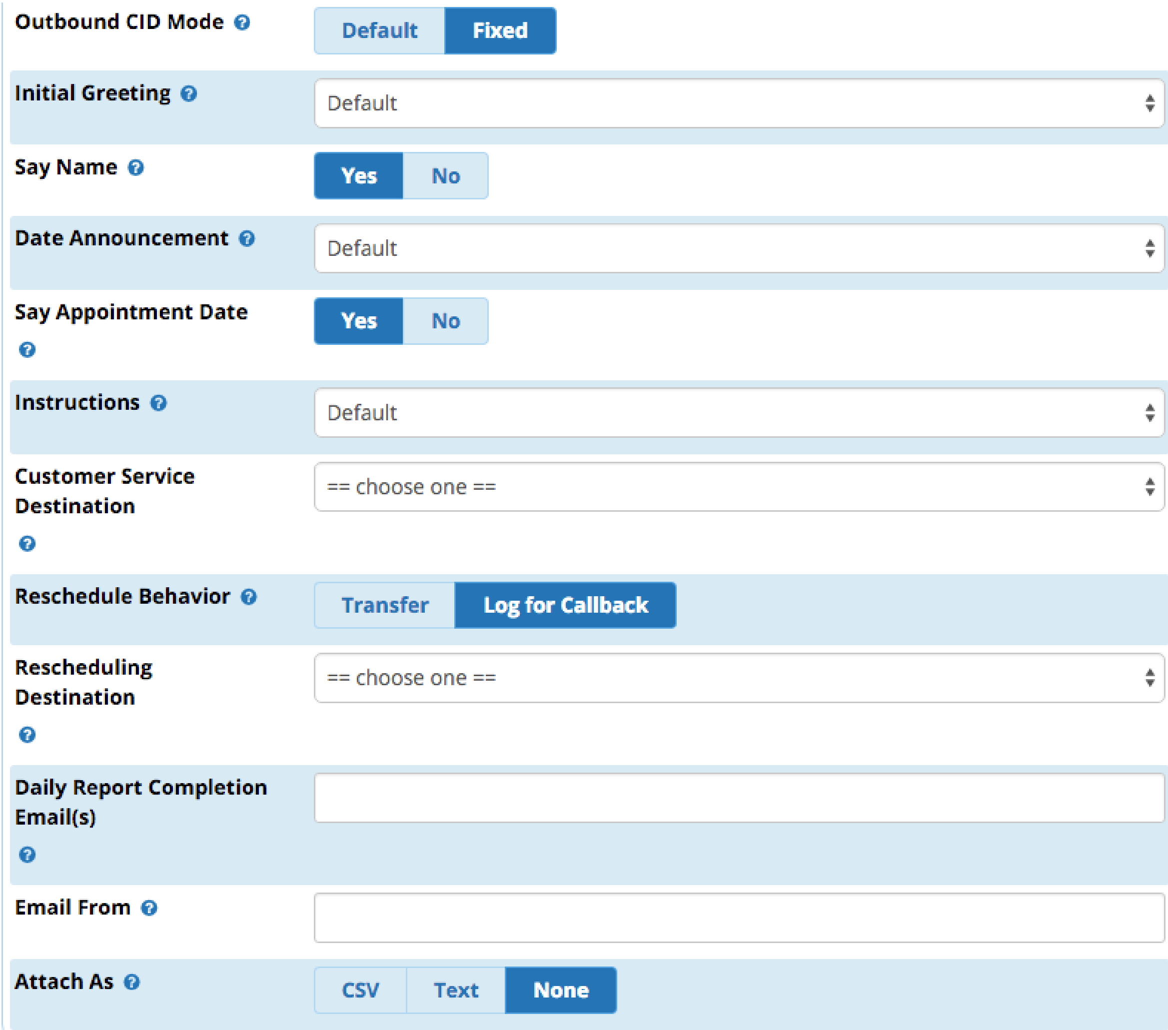
Retry Count: 2

Retry Delay: 4 hours

TTS Engine: flite

Fixed Caller ID

Caller ID Name



Name

This is the unique name for our Appointment Reminder.

Enabled

Yes/No: Whether the appointment reminder will run. You can easily enable/disable the appointment reminder by toggling this switch.

Daily Start Time

The time of day the appointment reminder will start. (In 24-hour format HH:MM).

Daily End Time

The time of day the appointment reminder will stop. (In 24-hour format HH:MM).

Max Advance Notice

How many days ahead of the scheduled appointment to place the reminder call.

Retry Count

How many times to retry calling recipient if the system is unable to reach them on the first call.

Retry Delay

How long, in hours, to wait after a failed attempt before retrying the recipient. Note that if the delay amount causes a retry to land after the appointment reminder's daily end time, the reminder will be attempted again the following day instead.

TTS Engine

This is the text to speech engine used to say the recipient's name. Unless you are an advanced user, this should be set to the default of **flite**.

Fixed Caller ID

The outbound caller ID that the call should appear to come from. **Outbound CID Mode** must be set to **fixed** below in order for this setting to be used.

Caller ID Name

(Optional) The caller ID name to display on calls to internal extensions.

Outbound CID Mode

Default/Fixed: Whether to use the system **default** caller ID or the **fixed** caller ID set above.

Initial Greeting

The first message played to the recipient. You can record a custom greeting or use the default. Additional recordings can be made in the System Recordings module. Be sure to include a message similar to, "This is an appointment reminder..."

Say Name

Yes/No: Whether to say the recipient's name. If **yes**, the system will use text to speech to read the name of the person associated with the reminder.

Date Announcement

The message played to the recipient prior to saying the date. Default = "You have an appointment scheduled on..." Additional recordings can be made in the System Recordings module.

Say Appointment Date

Yes/No: Whether to say the date announcement selected above, followed by the date of the appointment.

Instructions

Default or custom instructions to play to the recipient. Default = "To confirm this appointment, press ONE. To cancel, press TWO. To request your appointment be rescheduled, press THREE." You can record a custom message in System Recordings; however, it must match the pattern above.

Customer Service Destination

Where to send callers if they press ZERO.

Reschedule Behavior

How to handle calls when the recipient presses THREE to request rescheduling.

- **Transfer**: Transfer the call to the **Rescheduling Destination** set below.
- **Log for Callback**: Log the action for a call back, and terminate the call.

Reschedule Destination

(Only used if **Reschedule Behavior** = **Transfer**) Where to send callers who select THREE to request rescheduling.

Daily Report Completion Email(s)

One or more e-mail addresses to send daily reports to upon completion of Appointment Reminder calling for the day. Separate multiple e-mail addresses with commas.

Email From

Provide the e-mail address that the completion report e-mails will be sent from.

Attach As

CSV/Text/None: Whether to attach the report as a CSV or plain text file (or not include it at all).

Save

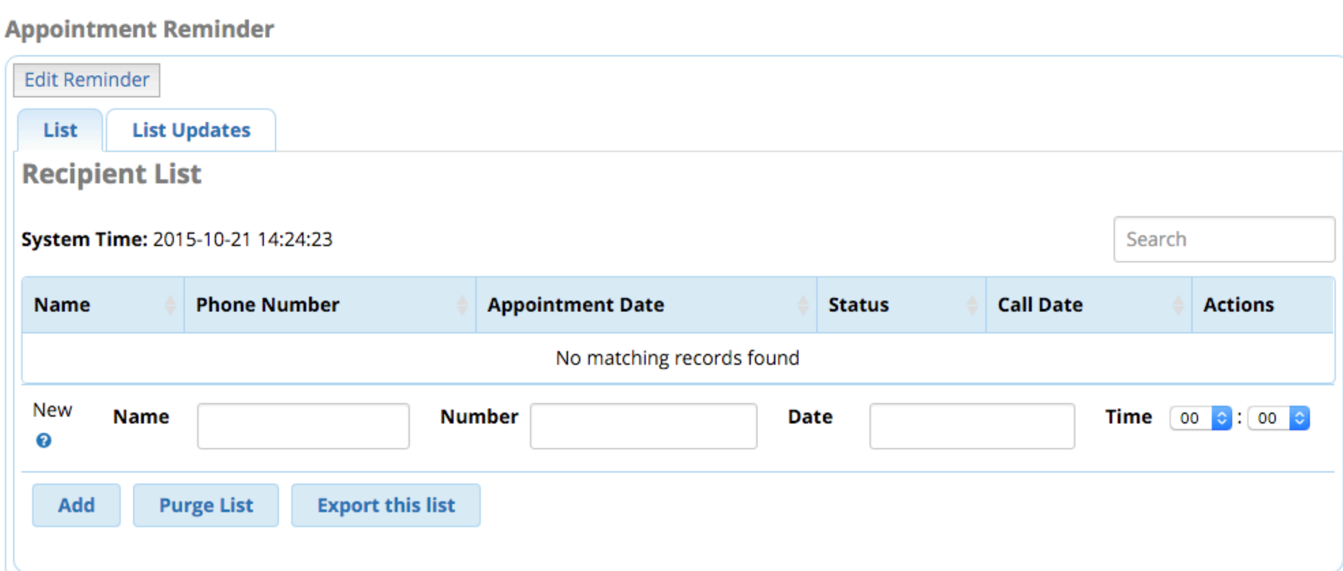
Press the **Submit** button when done.

A **Manage Recipients** button will now appear alongside the Submit button.

Manage Recipients

When viewing an appointment reminder, click the **Manage Recipients** button. Alternatively, from the Appointment Reminder home screen, click on the users button  .

You will be taken to the Recipient List screen as shown below:



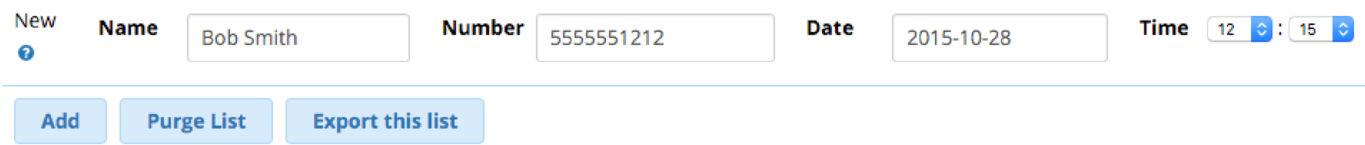
From here, you can choose whether to manage recipients directly via the GUI, set up automatic downloads of a CSV file, or upload a CSV file on a one-time basis.

Adding/Removing Recipients via the GUI

Click on the **List** tab if not already there.

Adding

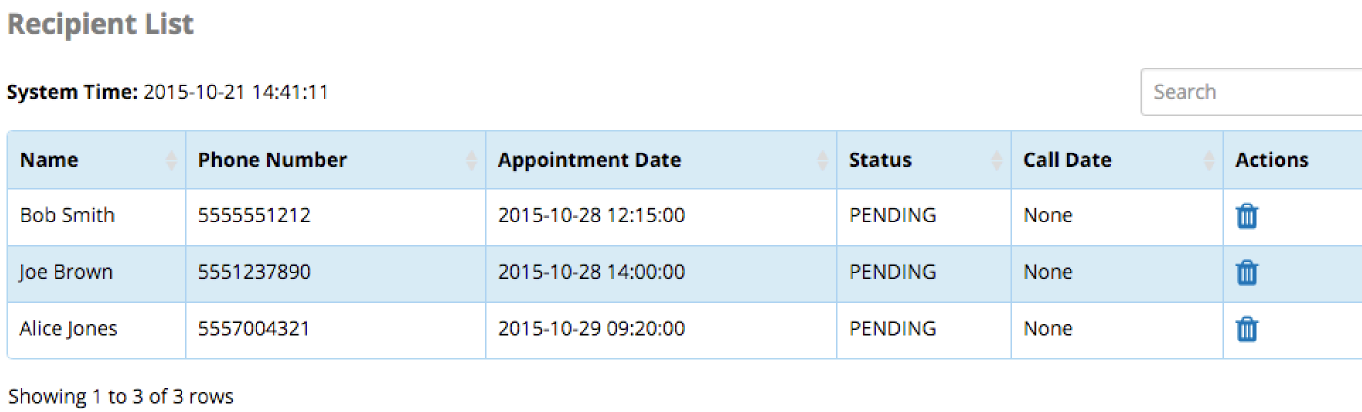
Enter the recipient's **Name**, phone **Number**, and appointment **Date & Time**.



Click the **Add** button.

Repeat for each recipient.

The list of recipients, phone numbers, dates/times, reminder status, and call dates will be shown.



Recipient List

System Time: 2015-10-21 14:41:11

Search

Name	Phone Number	Appointment Date	Status	Call Date	Actions
Bob Smith	5555551212	2015-10-28 12:15:00	PENDING	None	
Joe Brown	5551237890	2015-10-28 14:00:00	PENDING	None	
Alice Jones	5557004321	2015-10-29 09:20:00	PENDING	None	

Showing 1 to 3 of 3 rows

Removing

When viewing the recipient list, click the trash icon  to delete a single reminder.

To remove all of the reminders, click the **Purge List** button and confirm the deletion in the pop-up window that appears.

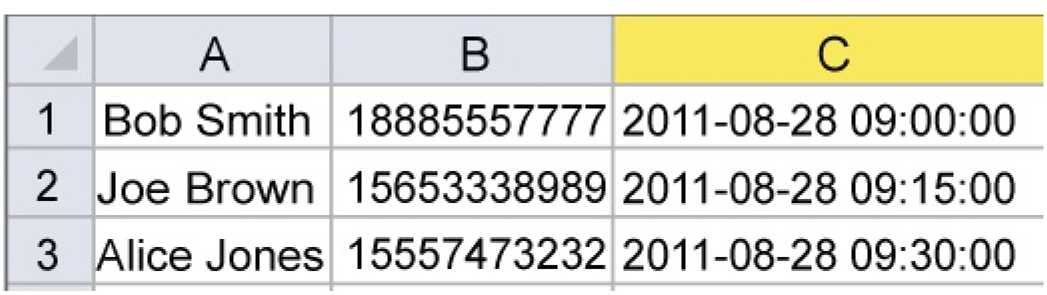
Using a CSV File

Creating the CSV File

You can create a CSV file of appointment reminder recipients using Excel or a similar editor.

This should be a basic CSV with the following columns: Name, Phone Number, Date (YYYY-MM-DD HH:MM:SS).

Note: There is an optional fourth column not shown below. If used, this is considered the "command" column, and you can choose to enter "delete" "add" or "update" depending upon what you'd like the system to do with the entry.



	A	B	C
1	Bob Smith	18885557777	2011-08-28 09:00:00
2	Joe Brown	15653338989	2011-08-28 09:15:00
3	Alice Jones	15557473232	2011-08-28 09:30:00

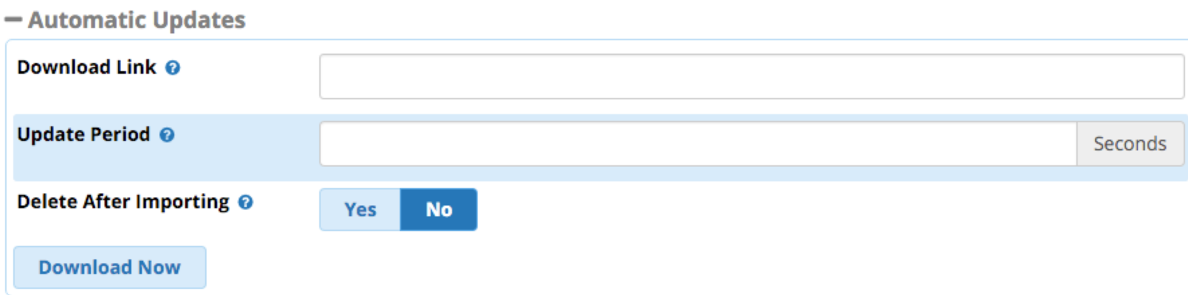
Scheduling Automatic CSV Updates

Create a CSV file as described above, and upload it to a server.

In an existing appointment reminder, click **Manage Recipients**.

Click the **List Updates** tab.

Complete the **Automatic Updates** section:



Download Link

Enter the URI to download the report from, such as:

ftp://username:password@192.168.1.1/reminder.csv

or

http://myserver.remote.com/downloadfile/file.csv

Currently, only http and ftp are supported.

Update Period

The update period, in seconds. This is how often the system will attempt to download the file. Minimum of 300 seconds (5 minutes).

Delete After Importing

(FTP ONLY!) **Yes/No**: Whether to delete the source file after the CSV has successfully been imported.

Download Now

Click the **Download Now** button and the system will download the data. Additional downloads will proceed based on the update period set above.

If the CSV file has been created properly, you will now see the new data populate under the **List** tab.

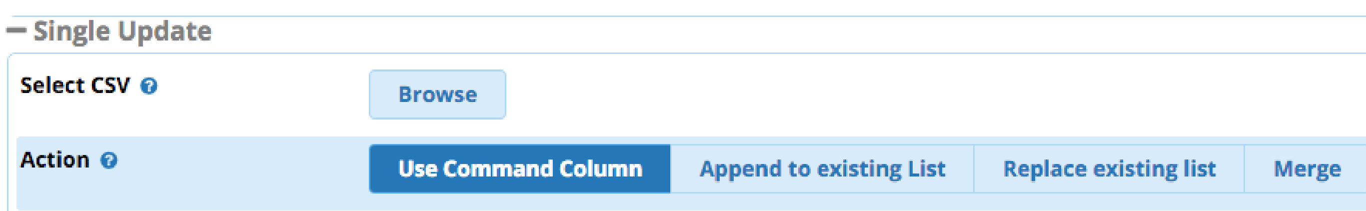
Making a Single CSV Update

Create a CSV file as described above.

In an existing appointment reminder, click **Manage Recipients**.

Click the **List Updates** tab.

Complete the **Single Update** section:



Select CSV

Click the **Browse** button.

Select the CSV file from your computer.

Action

Use Command Column: Handle each entry according to the fourth ("command") column in the CSV file. ("delete" "add" or "update") See Appointment Reminder - CSV Format.

Append to existing List: Add all CSV file entries to the existing list.

Replace existing List: Delete the entries in the existing list, and replace them with the entries in the CSV file.

Merge: Merge the entries.

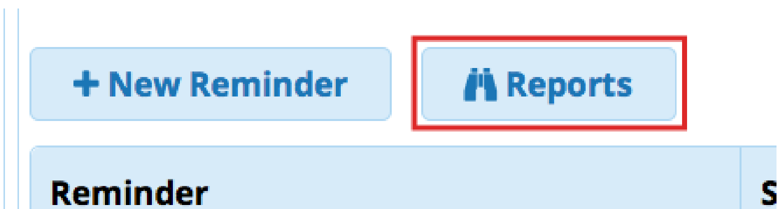
Save

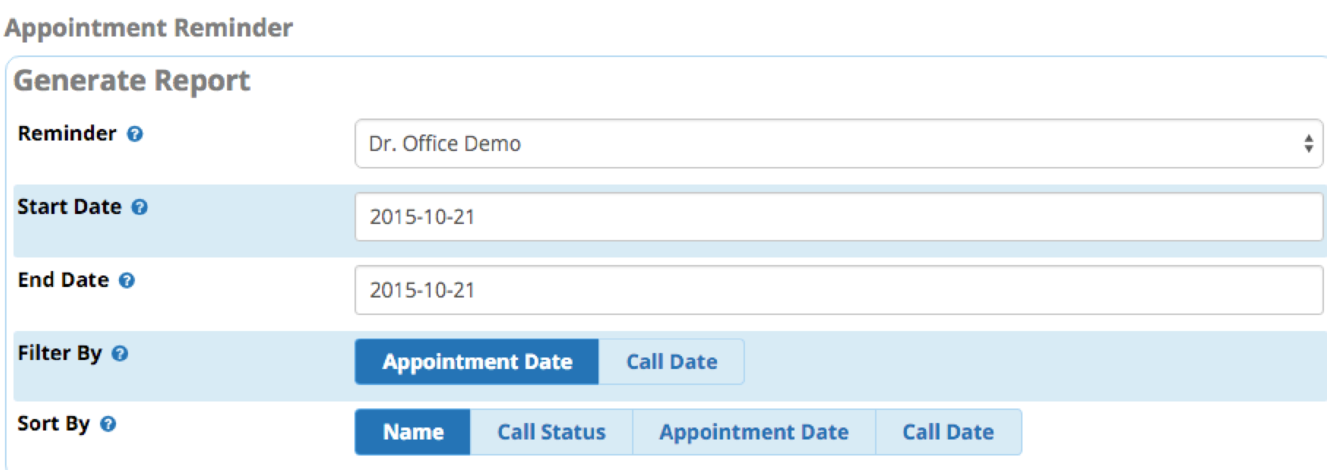
Click the **Save** button to perform the selected action.

If the CSV file has been created properly, you will now see the new data populate under the **List** tab.

Reporting

Click **Reports** from the options at the top.





Reminder

Select which appointment reminder you would like to run the report for.

Start Date

Start date to run this report from.

End Date

End date to run this report to.

Filter By

Appointment Date / Call Date: Whether the system should look for the appointment date or call date when filtering by the date range above.

Sort By

How to sort the data. Options:

- **Name:** Sort by the name of the person who was called.
- **Call Status:** Sort by "called" vs. "not called."
- **Appointment Date:** Sort by the appointment date.
- **Call Date:** Sort by the call date.

Generate

Click the **Generate** button if you would like to generate a report that will be shown on the screen.

Download CSV

Click the **Download CSV** button if you'd like to download a report in CSV format.