

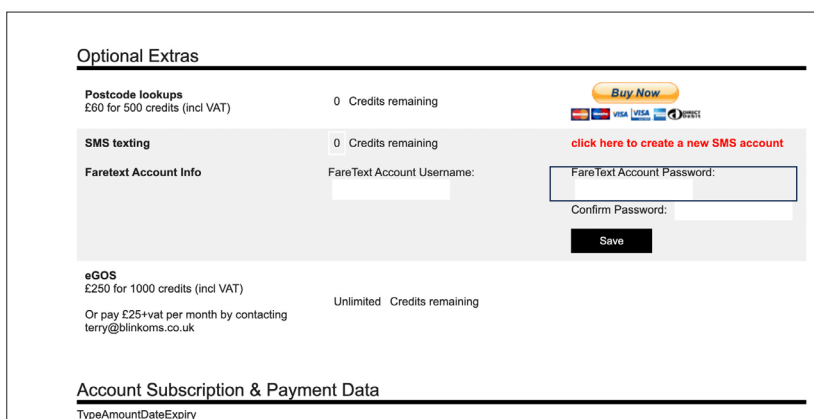
# User Guides - **SMS Text Messages**

*How to use your Blink OMS system to send SMS text messages to patients*

*Sending SMS messages to patients is a feature that you can choose to use in your Blink system. There are various different messages and ways an SMS message can be sent.*

**Firstly you will need to register open a Faretext account to buy SMS credits.**

You can do this by going to My Account -> Optional Extras -> [click here to create a new SMS account](#).



**Optional Extras**

Postcode lookups  
£60 for 500 credits (incl VAT)      0 Credits remaining      [Buy Now](#)

SMS texting      0 Credits remaining      [click here to create a new SMS account](#)

Faretext Account Info      FareText Account Username:       FareText Account Password:

Confirm Password:      

eGOS  
£250 for 1000 credits (incl VAT)      Unlimited Credits remaining

Or pay £25+vat per month by contacting  
terry@blinkoms.co.uk

**Account Subscription & Payment Data**

| Type | Amount | Date | Expiry |
|------|--------|------|--------|
|------|--------|------|--------|

When setting up your account the sender id field is either:

- your brand name (which will appear at the top of the text - using this will NOT allow replies)
- your mobile number (which will appear at the top of the text and recipients will be able to reply to this number)

## **Adding SMS credits to your account**

- When you first created your Blink SMS account with faretext you would have received 100 free credits to get you started.
- When this number is getting low you can call or email 'Faretext' (you will have been sent these details when you created your Blink SMS account with faretext) to buy more credits.
- SMS credits can be 'automatically' topped up when they get below a certain number by setting up a Direct Debit with faretext

It is easy to check your remaining SMS credit total by going to:

- My Account, under Optional Extras you will see your total number of remaining credits.
- When this number is getting low you can call or email 'Faretext' (you will have been sent these details when you created your Blink SMS account with faretext) to buy more credits.
- SMS credits can be 'automatically' topped up when they get below a certain number by setting up a Direct Debit with faretext.

## **SMS Credits**

*1 SMS credit = 160 characters.*

*If the message is longer than this you will use multiple credits.*

## **New to Faretext**

New customers will be able to sign-in using their newly acquired Faretext credentials (the same as they use to link to Faretext via Blink), and instantly top-up their accounts with a credit bundle via a credit card. Credits will be applied to their balance automatically and immediately pending authorisation from Stripe (this is usually acquired immediately)

Once logged in you will also be able to:

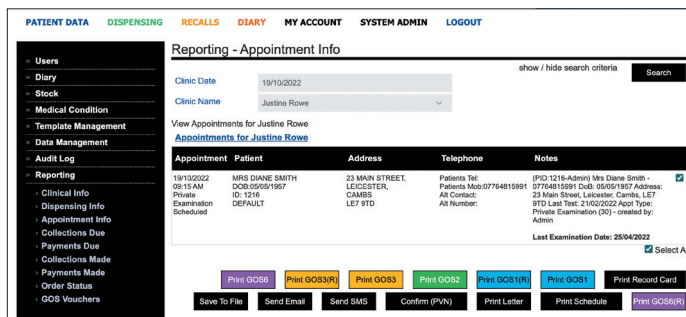
- View current account balance
- View past orders
- Download invoices
- Set your own low-balance threshold and dictate if they you this alert sent to email, SMS (free), or both. Note - this is only available after the first top-up has taken place.

## Sending SMS Messages

There are 3 ways you can send SMS text messages:

### 1. Send appointment reminders linked to your diary appointments:

- Go to *System Admin -> Reporting -> Appointment Info*
- Select date and clinic
- Select patients (or all patients)
- Click Send SMS
- Default reminder message is sent:



An example of the default SMS message is: *Hello Terry, we would like to remind you that you have an opticians appointment on 01/10/2024 at 09:00 AM*

### You can change the default message via

*System Admin -> Data Management -> Edit Settings -> General Settings -> Appointment Reminder SMS*

You can include these tags within your message:

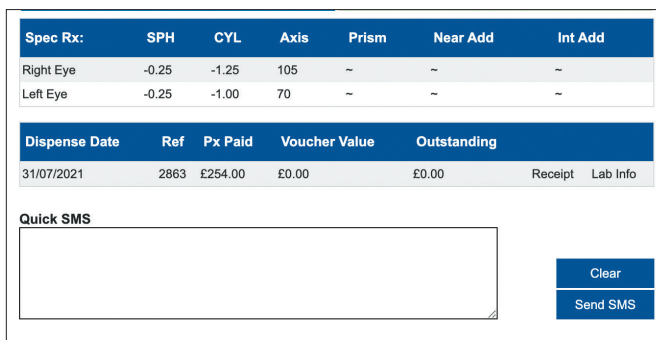
- [Patient] = full name incl title
- [Patient.Forename]
- [PatientName]
- [Date]
- [Time]

### 2. Send recalls:

- Go through the usual recall process (see guide to sending recalls for full details)
- Create your own bespoke SMS content in a template
- Choose Sending Method of “SMS Text”

### 3. One Off SMS text

- Select the patient that you want to contact
- *Patient Data -> Patient Summary*
- In the ‘Quick SMS’ box at the bottom of this page you can write a message (if you can’t see the ‘Quick SMS box – press ctrl/F5, this will refresh your system and it should appear)
- Press ‘Send SMS’ to send a one-off message to that patient



## New to Blink - additional/bespoke one off SMS buttons

- Select the patient you would like to contact
- *Patient Data -> Patient Information -> Patient Summary*
- At the bottom of the page a number of quick SMS buttons can be created – to save time typing your most sent messages.

Quick SMS

Specs Ready

Clear Send SMS

Quick SMS

Ferry Woodhouse Your spectacles are now ready for collection. Please call in at your earliest convenience to have them fitted.

Specs Ready

Clear Send SMS

- When a button is created it will automatically create a message for you to send. In this example, press the 'Specs Ready' button and the message will automatically populate in the text box for you to simply send.

Dispensing Update

(Order Id: 483)

Change the Status of the selected dispense:

Spec 1

Date Due: 18/09/2024

With Lab: 18/09/2024

Checked: 09/09/2024

Ready For Collection: 09/09/2024

Date Collected:

Update Applies To: Specs 1  Specs 2  Contact Lenses

Tick box to Reset

Due Date (enter date):

With Lab (enter date):

Checked (enter date):

Ready For Collection (enter date):

Collected (enter date):

Delete Save Close

In addition to the Specs Ready button we can add another 3 buttons.

Button 2 will notify the patient when their order has been sent to lab and Button 3 will notify them when their order has been checked.

Button 4 can be a button of your choice e.g. Thank you - Thank you for visting please leave us a review on ...

You can create the buttons via *Sytem Admin -> Data Management -> Edit Settings -> General Settings*

Print To Till Roll On Labview (Y/N) N

Record OrderArrived Or With Lab Status

Send Review SMS Message

Show Practice Address In Lab Email (Y/N) N

Show VAT Breakdown in Disp report (Y,N)

SMS When Change to Status 2

SMS When Change to Status 3

Spare Quick SMS Msg - prefix with btn title and :

Specs Ready SMS Text [Patient.Forename] [Patient.Surname] Your spectacles are now ready for collection. Please call in at yo

Title Is Mandatory (Y/N) Y

VAT Type (SDC or FCA) FCA

Update

Button 2

Button 3

Button 4

The text within the field should be formatted as below. The text before the colon will appear on the button and the text after the colon will appear in the quick SMS text box.

**Thank you:Thank you for visting please leave us a review on...**

If you can't see these fields in General Settings just let us know and we will update your system.

## Diary Appointment SMS Messages

When an appointment is entered into the diary you can choose to notify the patient by email or SMS or by printing a letter.

Select the 'Save and Notify' button and you will then be able to choose the method that you would like notify the patient - you can choose more than one method.

ADD NEW APPOINTMENT

Diary Name: Admin

Booked By: Admin

Patient Name: MR TERRY WOODHOUSE

Appt Type: Private Eye Test (45)

Appt Status: Scheduled

Date: 01 October 2024

Start Time: 09:00

Length: 45

Set Recurring Every: Weeks 0, Months 0, Years 0

Display Text: Mr Terry Woodhouse (Age: 72) - 07748500430

Appointment Reminder

Mr Terry Woodhouse thank you for booking an appointment with High Street Opticians

Appointment Date/Time: 01/10/2024 09:00:00  
Appointment Type: Private Eye Test (45)  
Appointment Status: Scheduled

If you cannot make your appointment, please call 01234 56789

Practice Address:

Telephone: 01234 56789  
Email: info@highstreet.co.uk  
Website: highstreetopticians.co.uk

A pop up window will appear asking for confirmation that you are happy to send the notification. Once the notification has been sent a red bar will appear confirming it has been sent.

These notifications are set in *System Admin -> Data Management -> Edit Settings -> General Settings*. If the fields "Appt Confirmation Email" or "Appt Confirmation SMS" are blank then the defaults will apply.

### The default SMS is:

*Your opticians appointment: Date and time  
Practice name and address  
To rearrange call xxxxxxxxxx*

### The default email is:

*Dear Mr Terry Woodhouse  
Thank you for booking an appointment with Opticians Name*

*Your appointment details are:  
Date/Time - 01/10/2024 09:00:00  
Address:practice address*

*If you cannot make your appointment, please contact us as soon as possible to arrange an alternative*

*Telephone: practice telephone  
Email: practice email  
Website: practice website (if you have one)*

If you would like to change the default SMS or email message you can type your own message into the 'Appt Confirmation SMS' field.

Text entered into settings can include the following tags:

- [BR] = new line in SMS
- [PATIENTFORENAME]
- [PATIENTSURNAME]
- [APPTDATETIME]
- [PRACTICEADDRESS]
- [PRACTICETEL]
- [PRACTICEEMAIL]
- [PRACTICEWEB]
- [APPTTYPE]
- [APPTSTATUS]

Information inside of the brackets will be taken from the patients information within Blink.

Here is an example of how to format the message and how it will appear once it has been sent:

[PATIENTFORENAME] [PATIENTSURNAME] you have booked an eye test at High Street Opticians, [PRACTICEADDRESS] on [APPTDATETIME]. We look forward to seeing you. To rearrange please call us on [PRACTICETEL]

Terry Woodhouse you have booked an eye test at High Street Opticians, 2 Main Street, Leicester LE1 1LE on 05/10/24 09:30:00. We look forward to seeing you. To rearrange please call us on 0116123456

**Please note that 1 SMS credit = 160 characters (including spaces), multiple credits will be used for longer messages.**

## Automated Patient Appointment reminders

We can set up fully automated appointment reminders to your patients. These are sent in the first instance by an SMS text message followed by an email if the patient doesn't have mobile number stored in their patient data. These messages can be sent on a specified number of days before the booked appointment e.g. either on the day or any number of days in advance.

## Check an SMS message has been sent

To check the sent SMS messages, select the patient and go to

- Go to *Patient Data -> Patient Information -> Document History*
- Here you will see all of the messages sent for that patient

## Creating a series of different SMS reminders

You can create as many different SMS messages as you require, go to:

*Recalls -> Edit Letter Templates - > Select Template*

Here you will find a number of pre-populated templates. You can work over the top of these templates or set up new ones.

To create a new template based on an existing one, you can follow these steps:

- Select the base template
- Change the 'Selected Template' field to 'Create New Template' (the original template will still be visible)
- Make your changes to the new template
- Enter a name for the new template into the 'Save As' box
- Click on the 'Save' button

*If you would like any of your templates to be populated with patient name, or examination date you can use any of the fields from the 'Insert Field' drop down list.*

## How to send a patient a 'Glasses ready SMS message

There are two ways to do this.

**A quick SMS in Patient Summary** (as explained on previous pages)

- Select the patient and go to *Patient Data -> Patient Summary*
- At the bottom of this page you can type a Quick SMS message and send it to the patient

**Thorough a dispense**

- Select the patient and go to *Patient Data -> Patient information -> Dispensing History*
- Once in Dispensing History select 'Delete or Update Balance/Dates
- When a date is entered into the 'Ready for collection (enter date)' field, an SMS message will be automatically sent



PATIENT DATA DISPENSING RECALLS DIARY MY ACCOUNT SYSTEM ADMIN LOGOUT

Dispensing Update

New Dispense  
Dispensing Update  
Till  
Till Update  
Z-Reading

(Order Id: 8846)

**Change the Status of the selected dispense:**

**Spec 1**  
**Date Due:** 28/06/2023  
**With Lab:**  
**Checked:**  
**Ready For Collection:**  
**Date Collected:**

**Update Applies To:**    Specs 1     Specs 2     Contact Lenses

Tick box to Reset

Due Date (enter date):    
 With Lab (enter date):    
 Checked (enter date):    
 Ready For Collection (enter date):    
 Collected (enter date):

Delete    Save    Close

Update saleid 8848  
Update saleid 8847  
Update saleid 8846  
Update saleid 8845  
Update saleid 8844  
Update saleid 8679

To change this message go to *System Admin -> Data Management -> Edit Settings*

- Scroll down to General Settings
- In general settings there is a field 'Specs Ready SMS' Text
- Change any of the text outside of the brackets. The text inside of the brackets will recall the patients name and appointment time etc.

## Opting a patient opt out of promotional mailings or even recall letters

There are various different types of communication that a patient is able to opt out of.

- To change these settings, select the patient and go to *Patient Data -> Patient Information -> Lifestyle Notes*.
- On the 'Lifestyle Notes' page towards the bottom of the page.
- 'Are you happy to receive promotional communication?' The patient can choose Yes or No.
- 'Are you happy to receive communication for the purposes of health care, including Recalls?'



## Contact

If you need guidance regarding any aspect of Blink you can contact us on the support email, where we will always try to respond within 24 hours:

[support@blinkoms.co.uk](mailto:support@blinkoms.co.uk)

Alternatively you can call us on the support line: 07748 500430

Or call the office phone: 0116 431 8284