



# Text and Email Reminders



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# 1. Overview

Sycle's *Review Wave Reminders Portal* ([text.sycle.net](https://text.sycle.net))<sup>1</sup> offers the ability to automatically send appointment reminders via email and/or using *short message service* (SMS). This feature includes — but is not limited to — the ability to:

- customize outgoing messages via templates
- limit the reminders to specific appointment types
- send bulk SMS messages (based on the date of the patients' last appointment or next appointment)

This guide instructs you in the following:

- [Initial Setup, page 2](#): The configuration needed when first setting up text and email reminders.
- [Appointment Reminders Basics, page 4](#): This chapter instructs a first-time user in the basics, including accessing and navigating through [text.sycle.net](https://text.sycle.net).
- [Configuration, page 7](#): This chapter covers most configuration tasks, including how to set up your account and other users' accounts; how to set up your office phone number; and how to set up your reminders, including how to create (or edit) your reminder messages and how to configure when patients should be sent reminders.
- [Managing Contacts, page 25](#): This chapter details how to manage, create, and edit contacts. It also shows you how to create saved reply messages and how to use [text.sycle.net](https://text.sycle.net) to hold SMS conversations.

Most chapters are broken into subchapters that are specific to a particular task or screen. Refer to the Table of Contents for a full list of chapters and subsections.

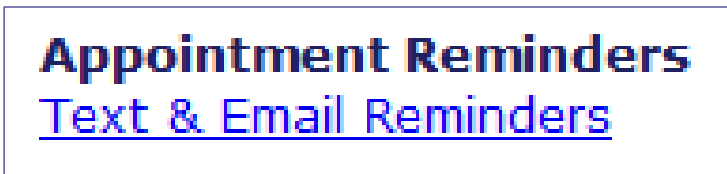
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<sup>1</sup>Text and email reminders are provided through integration with the appointment reminder service from Review Wave©. This service is developed, operated, and maintained by Review Wave alongside its third-party service providers.

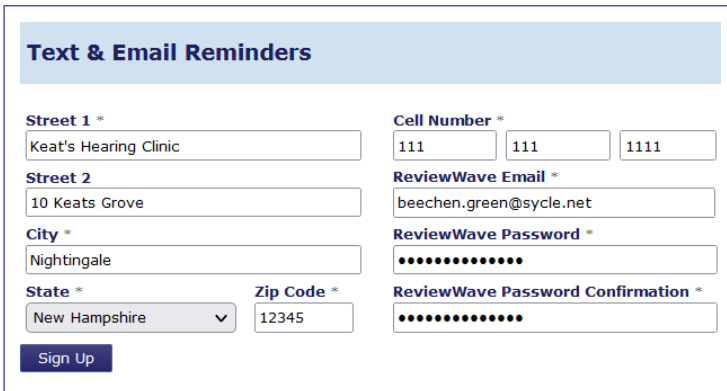
## 2. Initial Setup

The steps in this chapter are performed when setting up text and email reminders for the first time.

1. Navigate to the *Administration* screen.
2. Navigate down the *Administration* screen. Under *Appointment Reminders*, click **Text & Email Reminders**.



3. Complete the fields on the **Text & Email Reminders** screen, then click **Sign Up**.



The screenshot shows the 'Text & Email Reminders' form. It has a light blue header with the title 'Text & Email Reminders'. Below the header are several input fields:
 

- Street 1 \***: Keat's Hearing Clinic
- Street 2**: 10 Keats Grove
- City \***: Nightingale
- State \***: New Hampshire (dropdown menu)
- Zip Code \***: 12345
- Cell Number \***: 111 111 1111
- ReviewWave Email \***: beechen.green@sycle.net
- ReviewWave Password \***: [masked with dots]
- ReviewWave Password Confirmation \***: [masked with dots]

 At the bottom left of the form is a blue 'Sign Up' button.

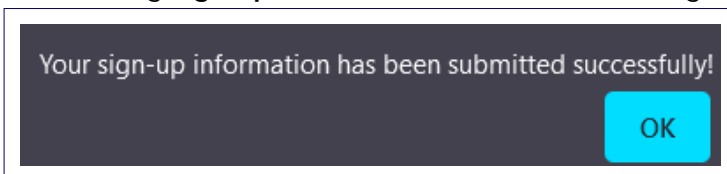


The **ReviewWave Email**, **ReviewWave Password**, and **ReviewWave Password Confirmation** fields are *not* asking for existing credentials. These fields are used by Sycle to create an account for the *Review Wave Reminders Portal* ([text.sycle.net](http://text.sycle.net)), where you will configure your text and email reminders in a later chapter.

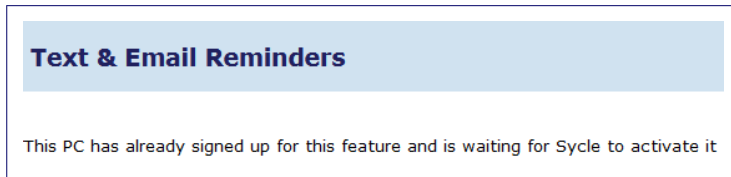


If there are no fields on the **Text & Email Reminders** screen and you see only a "**Manage Notification** [sic]" button, the steps in this chapter have already been completed. Proceed to [Appointment Reminders Basics, page 4](#).

4. After clicking **Sign Up**, click **OK** in the confirmation dialog box.



The **Text & Email Reminders** screen will refresh and display the following:



When you receive your activation from Sycle, you can proceed to configure your text and email reminders. Proceed to [Appointment Reminders Basics, page 4](#).

## 3. Appointment Reminders Basics

This chapter shows you how to log in to the *Review Wave Reminders Portal* ([text.sycle.net](https://text.sycle.net)), interpret and adjust the data shown on the dashboard, and provides an overview of the navigation menu.

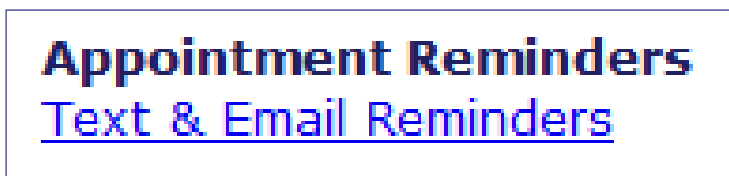
Before proceeding with the instructions in this chapter, ensure that the following conditions have been met:

- the steps in [Initial Setup, page 2](#) are complete
- you have received your activation for [text.sycle.net](https://text.sycle.net) from Sycle

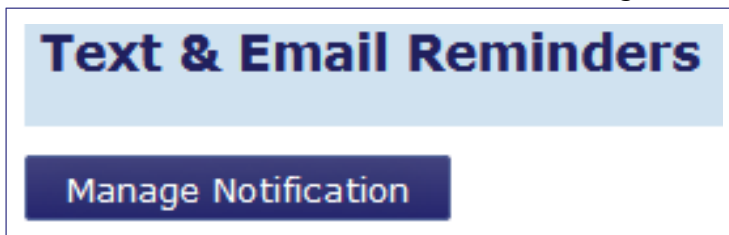
### 3.1. Logging In

While [text.sycle.net](https://text.sycle.net) is separate from your Sycle Private Practice instance and uses different login credentials, it can be accessed from Sycle Private Practice.

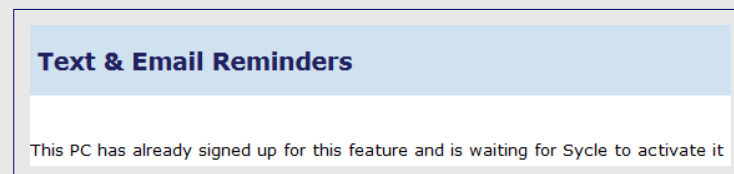
1. Navigate to the *Administration* screen.
2. Navigate down the *Administration* screen. Under *Appointment Reminders*, click **Text & Email Reminders**.



3. On the *Text & Email Reminders* screen, click **Manage Notification**.

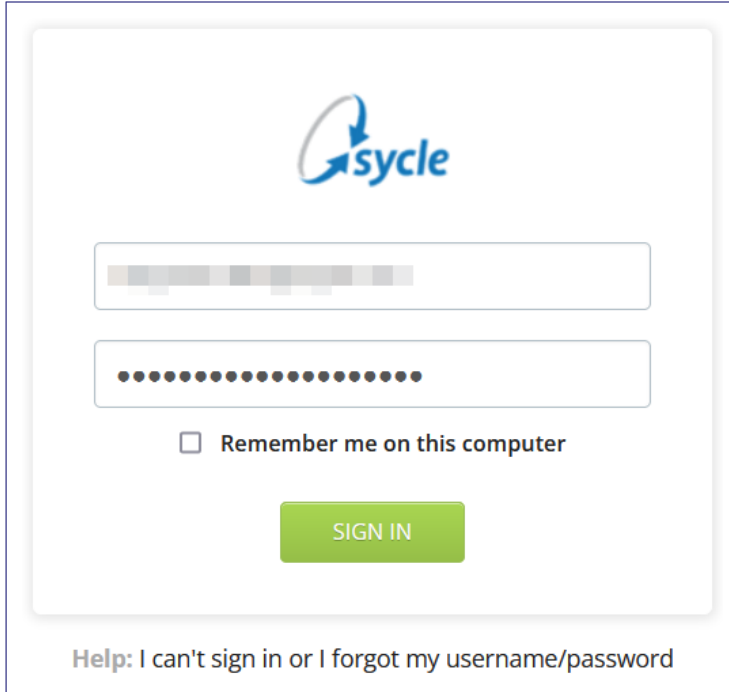


If the *Text & Email Reminders* screen shows this message, your account is pending activation from Sycle.



If you are being prompted to fill in fields on the *Text & Email Reminders* screen instead of seeing a **Manage Notification** button, follow the steps in [Initial Setup, page 2](#).

4. Sign in to [text.sycle.net](https://text.sycle.net) using the credentials entered in the *Initial Setup* chapter (the **ReviewWave Email** and **ReviewWave Password** from [Step 3 in Initial Setup, page 2](#)).



The screenshot shows the Sycle login interface. At the top center is the Sycle logo. Below it are two input fields: the first for a username (displayed as a series of grey squares) and the second for a password (displayed as a series of black dots). Below the password field is a checkbox labeled "Remember me on this computer". At the bottom center is a green button with the text "SIGN IN". Below the button is a link that reads "Help: I can't sign in or I forgot my username/password".



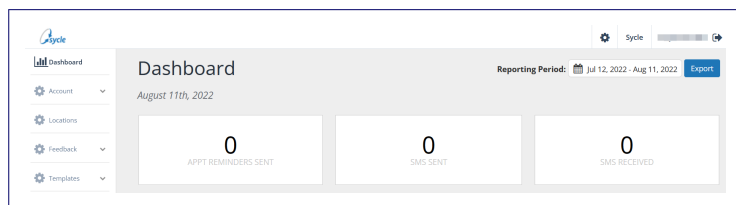
If you can not sign in, first ensure that the *Text & Email Reminders* screen in Sycle Private Practice does not show a "[...] waiting for Sycle to activate it" message (as shown in [Step 3 in Initial Setup, page 2](#)). If you see the "Manage Notification" button on that page, return to [text.sycle.net](https://text.sycle.net), click "I can't sign in or I forgot my username/password," and follow the onscreen instructions.

After signing in, you will be presented with the *Dashboard* screen. Proceed to [Dashboard Overview, page 6](#).

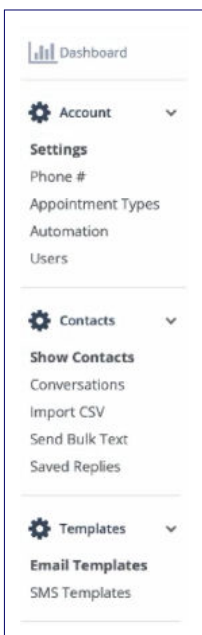
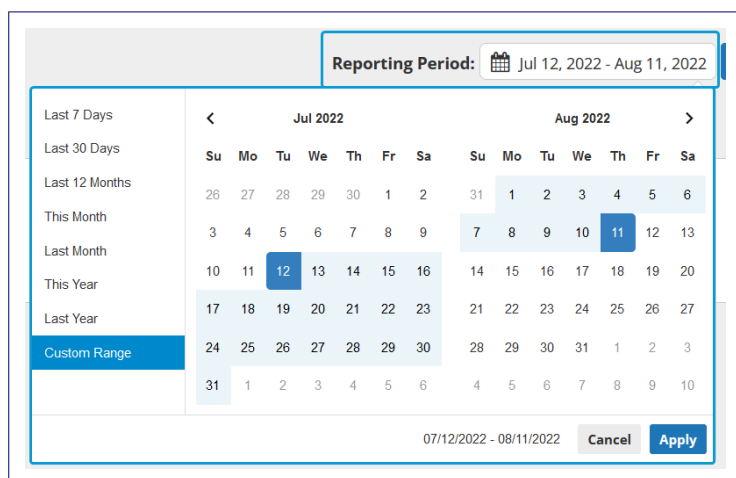


## 3.2. Dashboard Overview

The *Dashboard* screen is an overview of appointment reminders sent, as well as SMS messages sent and received.



By default, the statistics show on the dashboard are from the last month. You can click on the **Reporting Period** field to change the date range.



The dashboard also contains a side navigation menu, which is the primary method of navigating between screens. The options in the navigation menu are covered in more detail in the relevant chapters.


## 4. Configuration

This chapter shows you how to set up your reminders, including how to create (or edit) your reminder messages and how to configure when patients should be sent reminders.

While this chapter is written with the initial setup of text and email reminders in mind, any relevant sub-chapter can be used to edit existing configurations.

### 4.1. Account Settings

#### Accessing the Account Settings Screen

1. Use the side navigation menu to access the  **Account** > *Account Settings* screen.



Some of the data on this screen is automatically populated with information from Sycle.

2. Verify that the existing information in the fields matches your records, and fill in incomplete fields.

#### 4.1.1. Field Definitions

The requirements for most fields on this screen are standard (e.g. the address information) and are not defined here. This chapter focuses on fields with specific stipulations, conditions, or limitations. While not all fields are mandatory, the absence of a field's definition within this chapter should not be interpreted to mean that a field does not need to be completed.

- **Login Email:** This is the email used to sign in, which was originally created in the *Initial Setup* chapter (the **ReviewWave Email** from [Step 3 in Initial Setup, page 2](#)).
- **Request Email:** This is the email address that your email reminders *appears* to be sent from. This does not need to be an existing email address, nor does it need to be on an existing domain. For example, a clinic may choose to set this field to `no-reply@clinicname.com`.
- **Password** (*New Password* and *Confirm Password*): Here you can change the password used to sign in from the original password that was created in the *Initial Setup* chapter (the **ReviewWave Password** from [Step 3 in Initial Setup, page 2](#)).

## 4.2. Phone Number

During the initial setup of your text reminders, this screen is used to configure your Sycle phone number and (optionally) your office phone number. Sycle can use one of two phone numbers for sending SMS messages: your office phone number or your Sycle phone number.

The **Sycle Phone Number** is used to send and receive SMS messages if you are not using your office phone number. If you are using your office phone number, the Sycle phone number acts as a backup.

The **Office Phone Number** is used to make it appear that your text reminders are being sent from your office phone number. The Sycle phone number acts as a backup.



If you have already configured your Sycle phone number, the Phone Number screen can only be used to add, remove, or edit the **Office Phone Number** field. See [Configuring the Office Phone Number, page 9](#).

### Configuring the Sycle Phone Number

The Sycle phone number can only be configured once. If a phone number is displayed beside the Sycle Phone Number field, the number does not need to (and can not) be configured.

1. Use the side navigation menu to access the **Account > Phone #** screen.
2. In the **Sycle Phone Number** section of the screen, enter your area code in the **Area Code** field.

**Sycle Phone Number:** Enter your area code and then click the Look Up button.

Area Code:

3. Click the **Look Up** button.



Entering an invalid area code will prompt you with a warning after you click **Look Up**. Click **Ok** and enter a different area code.

**Sycle**

No phone numbers were found for the 555 area code. Please try again or try another area code.

4. Select a **phone number** from the provided list and click the **Reserve Phone Number** button.

**Sycle Phone #** Please select one of the numbers below to use as your Sycle phone number:

(888) 9 [redacted] 8  
 (888) 9 [redacted] 7  
 (888) 9 [redacted] 5

[Reserve Phone Number](#)


The phone number selected now displays beside the **Sycle Phone Number** field on the *Phone #* screen.

To configure your office phone number, proceed to [Configuring the Office Phone Number, page 9](#). Otherwise proceed to [Appointment Types, page 11](#).

### Configuring the Office Phone Number

If you plan to use the phone number provided by Sycle (configured in [Configuring the Sycle Phone Number, page 8](#)), you can skip this chapter and proceed to [Appointment Types, page 11](#).

1. Use the side navigation menu to access the **Account** > *Phone #* screen.
2. In the **Office Phone Number** field, enter your office's landline phone number.

 The entry must be a landline phone number. Cell phone and [Voice over Internet Protocol \(VoIP\)](#) numbers are not permitted.

3. Click **Submit Request** to continue to the next screen.

**Office Phone Number:** Please enter the office phone number you would like to use:

[Submit Request](#)

4. Enter your initials and click **Verify Phone Number**.

*Phone Number*

In order to setup the office phone number [redacted] you must verify that you own this number.

By providing your initials, you acknowledge that you own and have the right to use [redacted] as a text message enabled phone number

No Does your office phone require an extension of any kind?

[Verify Phone Number](#)

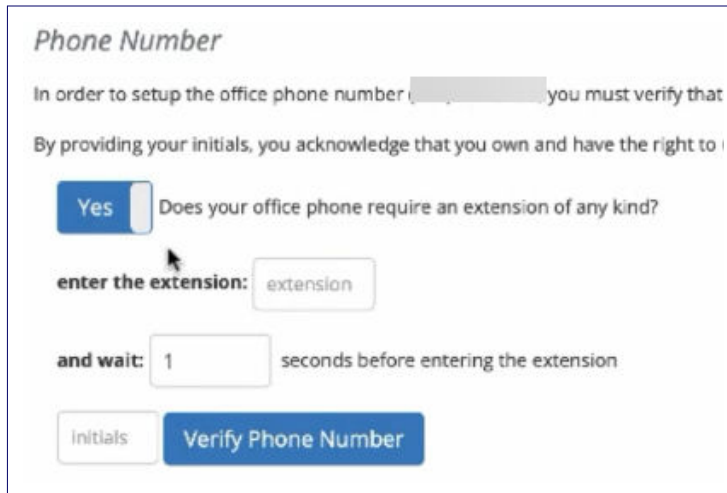
*Cancel Adding Phone Number*

Cancel provisioning [redacted]?

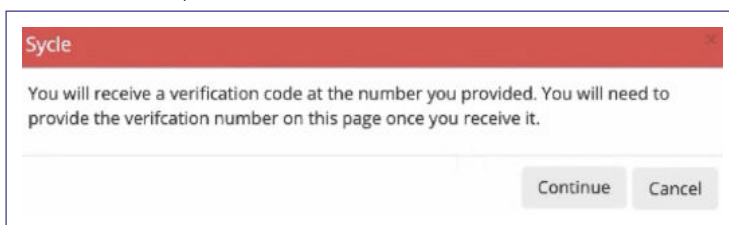
[Cancel and Go Back](#)

**Note:** If you experience any problems and are unable to setup your phone number, please contact support.

- If your office phone number requires an extension, click the **No** button to toggle it to **Yes**. Complete the **enter the extension** and the **and wait** fields, then click **Verify Phone Number**.



5. Review the message on the screen. Ensure you are able and ready to receive a call at the number entered above, then click **Continue**.



If you receive an error message on the screen, ensure you are not using a cell phone or **VoIP** number.

6. Enter the code from the phone call to verify your phone number.

After entering the code, your office number will be used as your text reminder number after a processing delay. This typically takes 24-48 hours. Proceed to [Appointment Types, page 11](#).

## 4.3. Appointment Types

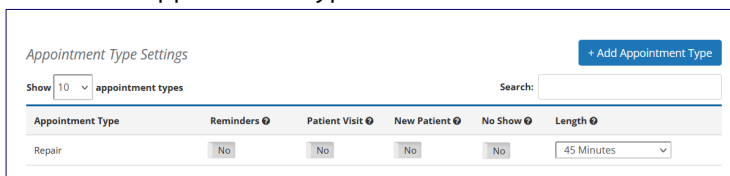
In the *Appointment Types Settings* screen, you can configure whether or not a reminders are sent for specific types of appointments.



Appointment Types are configured in Sycle Private Practice, on the **Administration > Scheduling > Appointment Types** screen.

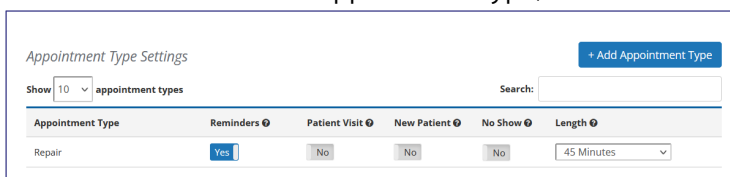
### Configuring Appointment Types

1. Use the side navigation menu to access the **Account > Appointment Types** screen.
2. Locate the appointment type. You can use the **Search** bar to search for a specific appointment.



The screenshot shows the 'Appointment Type Settings' interface. At the top right is a '+ Add Appointment Type' button. Below it is a search bar and a 'Show 10 appointment types' dropdown. A table lists appointment types with columns for 'Reminders', 'Patient Visit', 'New Patient', 'No Show', and 'Length'. The 'Repair' row has 'No' buttons for 'Reminders', 'Patient Visit', 'New Patient', and 'No Show', and a '45 Minutes' dropdown for 'Length'.

3. To send reminders for an appointment type, click the **No** button to toggle it to **Yes**.



This screenshot is identical to the previous one, but the 'Reminders' button for the 'Repair' row is now highlighted in blue and labeled 'Yes', indicating that reminders are now enabled for this appointment type.



The **Patient Visit**, **New Patient**, **No Show**, and **Length** fields are used for reviews, which are not covered in this document.


4. Repeat [Step 2](#) and [Step 3](#) for other appointment types as needed.

Now that the appointment types are configured to send reminders, you can proceed to tell the system which reminder to send (and when to send it). Proceed to [Automation, page 12](#).

## 4.4. Automation

The *Automation* screen is where you configure which reminder messages are sent, and when to send them.

### Accessing the Automation Screen

- Use the side navigation menu to access the  **Account** > *Automation* screen.

This screen has three sections with differing configuration options. This chapter is split into three procedures, each covering a different section of the screen.

### Configuring Appointment Reminders

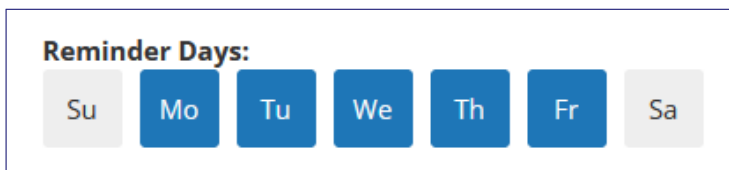
1. In the **Reminder Days** section, click a weekday to toggle whether reminder messages *are* sent on those days (blue) or whether reminders *are not* sent on those days (gray).



These selections determine if reminder messages are sent *on* the weekdays selected, not necessarily for appointments that are scheduled for that day.

The below examples assume that two appointment reminders are configured: one reminder the day before an appointment, and a second reminder two hours before the appointment.

#### Example 1. Reminder messages are not sent on (Su)nday and (Sa)turday.



A patient with an appointment on Saturday would be sent the first reminder message on Friday (enabled), but would not be sent the second reminder on the day of the appointment (disabled).

#### Example 2. Reminder messages are sent on all days of the week.



A patient with an appointment on any day will be sent the first and second reminder messages.

2. Select one of the following for the **Confirmed Appointments** flag:
  - **Off:** Do *not* send reminders for upcoming confirmed appointments.
  - **On:** Send reminders for upcoming confirmed appointments.
3. Select one of the following for the **Reminder Limit** flag:
  - **Off:** Do *not* limit reminders when the patient has multiple appointments on the same day.
  - **On:** Limit reminder messages when the patient has multiple appointments on the same day.

4. In the *Appointment Reminders* section:

- a. Set the **Send Email** field to the desired email template (see [Email Templates, page 20](#)) or to **-disabled-** if you only want to send an SMS reminder.

If you have not already configured email templates for your reminders, you can immediately follow the instructions in [Email Templates, page 20](#) and return to this chapter. If you wish to follow this guide in order, that chapter of this document does instruct you to return here to set the reminders to use the new templates.

- b. Set the **Send SMS** field to the desired SMS template (see [SMS Templates, page 23](#)) or to **-disabled-** if you only want to send an email reminder..

If you have not already configured SMS templates for your reminders, you can immediately follow the instructions in [SMS Templates, page 23](#) and return to this chapter. If you wish to follow this guide in order, that chapter of this document does instruct you to return here to set the reminders to use the new templates.

- c. Set the **When** field to one of the available options, or select **At Time** and specify a specific time in the **At** field.

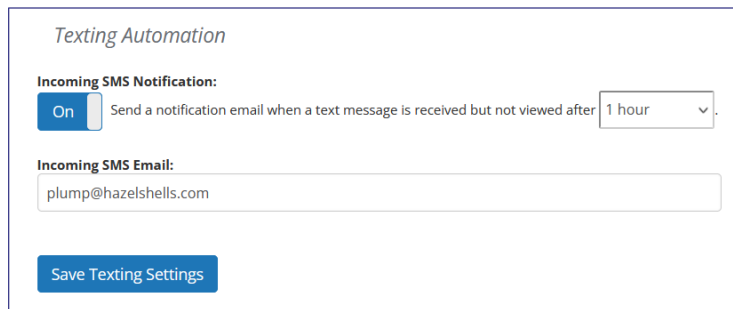
- d. If needed, click **Add Reminder** to create a new scheduled reminder. Repeat [Step 4.a](#), [Step 4.b](#), and [Step 4.c](#).
- e. Click **Save Reminders**.

The *Appointment Reminders* section of the *Automation* screen is configured. Continue to [Configuring Texting Automation, page 14](#).



## Configuring Texting Automation

The *Texting Automation* section is where you configure or disable notifications for unread incoming SMS messages (typically a patient's reply to an SMS reminder).



1. Select one of the following for the **Incoming SMS Notification** flag:
  - **Off:** Notifications for unviewed SMS messages are not sent.
  - **On:** A notification email is sent to the **Incoming SMS Email** when a text message is received but not viewed after the time configured.
2. Set the secondary field for the **Incoming SMS Notification** flag to the desired time. When an SMS message has been received and is not viewed within this time, an email notification will be sent to the **Incoming SMS Email**.
3. In the **Incoming SMS Email** field, enter an email address.



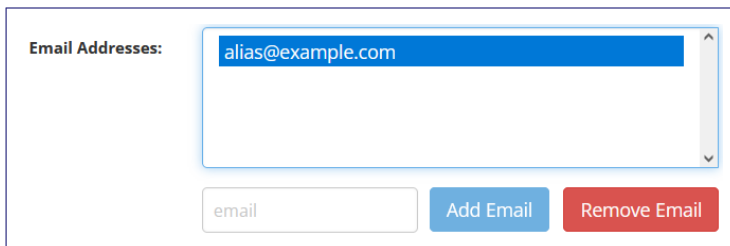
Ensure this email address is actively and regularly monitored.

The Texting Automation section of the Automation screen is configured. Proceed to [Configuring Opt-outs, page 15](#).

## Configuring Opt-outs

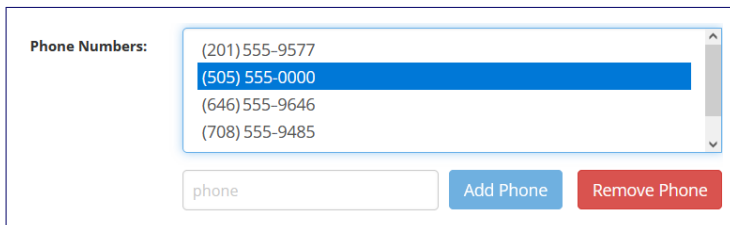
The *Opt-outs* section is where you enter the email addresses and phone numbers which should not receive automatic email or SMS reminders or automated feedback requests.

1. In the **Email Addresses** section:



The screenshot shows the 'Email Addresses' section. It features a text input field containing 'alias@example.com'. Below the input field are three buttons: 'email' (a placeholder or label), 'Add Email' (a blue button), and 'Remove Email' (a red button).

- a. Enter an email address in the **email** field.
  - b. Click **Add Email**.
    - To remove an email address from the list, select the email address and click **Remove Email**.
2. In the **Phone Numbers** section:



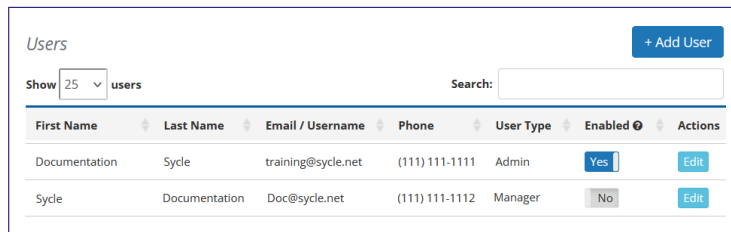
The screenshot shows the 'Phone Numbers' section. It features a list of phone numbers: '(201) 555-9577', '(505) 555-0000', '(646) 555-9646', and '(708) 555-9485'. The number '(505) 555-0000' is highlighted in blue. Below the list are three buttons: 'phone' (a placeholder or label), 'Add Phone' (a blue button), and 'Remove Phone' (a red button).

- a. Enter a phone number in the **phone** field.
- b. Click **Add Phone**.
  - To remove a phone number from the list, select the phone number and click **Remove Phone**.

Proceed to [Users](#), page 16.

## 4.5. Users


The *Users* screen is where you configure the users for [text.sycle.net](https://text.sycle.net).



First Name	Last Name	Email / Username	Phone	User Type	Enabled	Actions
Documentation	Sycle	training@sycle.net	(111) 111-1111	Admin	Yes	Edit
Sycle	Documentation	Doc@sycle.net	(111) 111-1112	Manager	No	Edit

While you can create new user accounts (see [Creating a New User, page 17](#)), the existing users in Sycle Private Practice are imported to [text.sycle.net](https://text.sycle.net). These imported records must be assigned permissions and enabled before they can be used to sign in to [text.sycle.net](https://text.sycle.net) (see [Configuring User Records, page 18](#)).

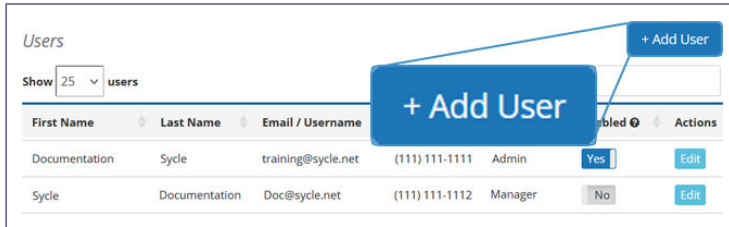
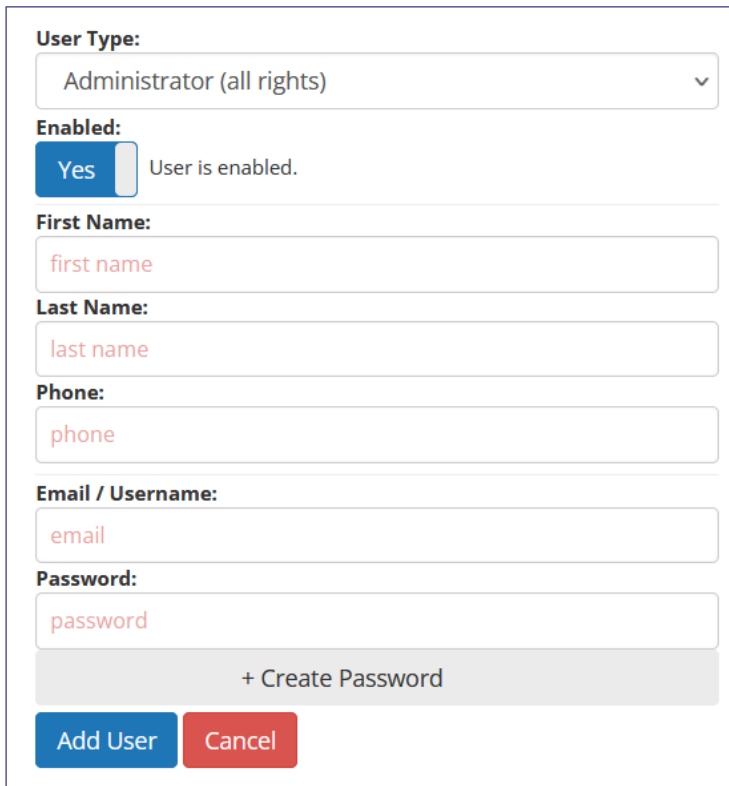
### Accessing the Users Screen

- Use the side navigation menu to access the  **Account** > *Users* screen.

## Creating a New User

This step only needs to be performed if the desired user was not imported from Sycle Private Practice. Otherwise, proceed to [Configuring User Records, page 18](#).

1. Click **+ Add User** to open the *Add User* screen.

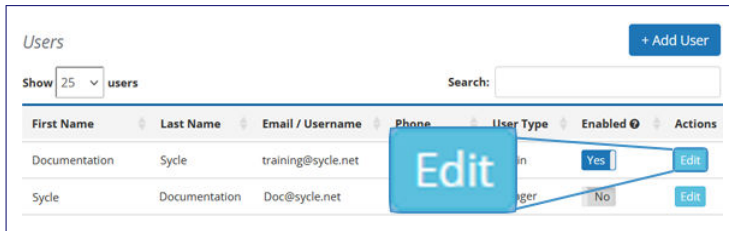
The 'Add User' form contains the following fields and controls:

- User Type:** A dropdown menu currently set to 'Administrator (all rights)'.
- Enabled:** A toggle switch set to 'Yes' with the text 'User is enabled.' next to it.
- First Name:** A text input field with a placeholder 'first name'.
- Last Name:** A text input field with a placeholder 'last name'.
- Phone:** A text input field with a placeholder 'phone'.
- Email / Username:** A text input field with a placeholder 'email'.
- Password:** A text input field with a placeholder 'password'.
- + Create Password:** A button to generate a password.
- Add User:** A blue button to submit the form.
- Cancel:** A red button to cancel the form.

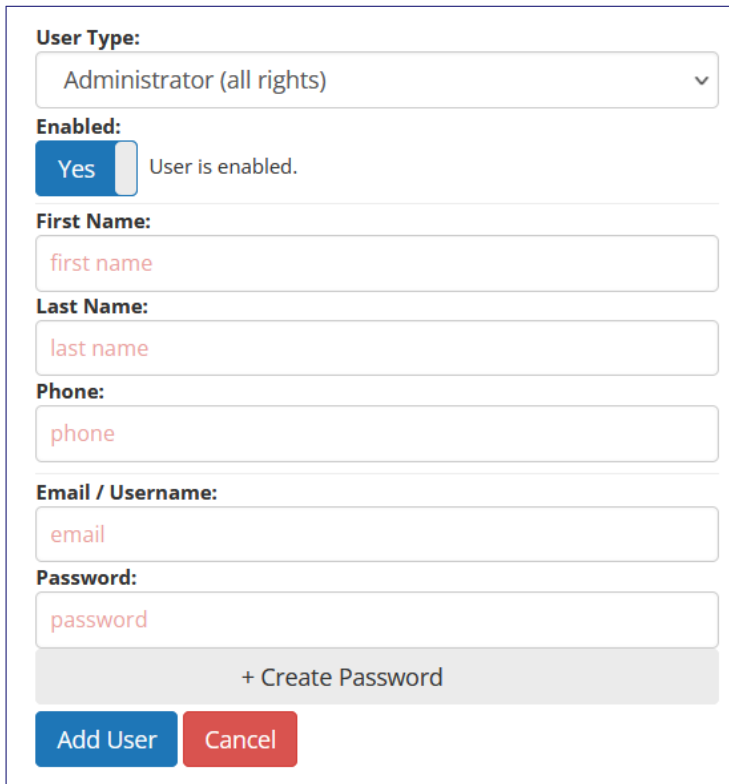
2. Proceed to [Step 2 of Configuring User Records, page 18](#)

## Configuring User Records

1. On the user record, click **Edit** to open the *Edit User* screen.



First Name	Last Name	Email / Username	Phone	User Type	Enabled	Actions
Documentation	Sycle	training@sycle.net			Yes	Edit
Sycle	Documentation	Doc@sycle.net			No	Edit



**User Type:**  
Administrator (all rights) ▼

**Enabled:**  
Yes  User is enabled.

**First Name:**  
first name

**Last Name:**  
last name

**Phone:**  
phone

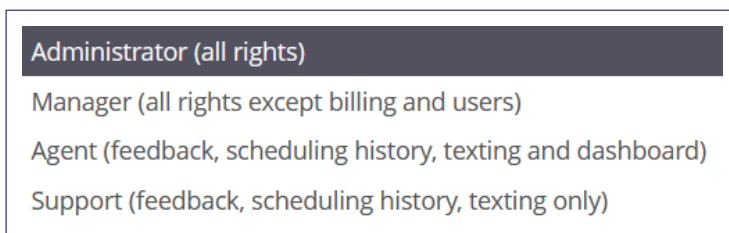
**Email / Username:**  
email

**Password:**  
password

+ Create Password


Add User Cancel

2. In the User Type field, select a user type. The permissions for each user type are listed in the selection.



- Administrator (all rights)
- Manager (all rights except billing and users)
- Agent (feedback, scheduling history, texting and dashboard)
- Support (feedback, scheduling history, texting only)

3. Click the **Enabled** flag to toggle between *Disabled* and *Enabled*.



The "User is enabled" text is a description of the field, and does not reflect whether the user is enable or disabled.

4. Enter the user's information in the **First Name**, **Last Name**, and **Phone** fields.

5. In the **Email / Username** field, enter the user's email address. The user will use this email address to sign in to [text.sycle.net](https://text.sycle.net).



All usernames must be email addresses.

6. In the **Password** field, either **enter a temporary password** or click + **Create Password** to generate a random temporary password.



You can not view this password after saving the user record. The user will be prompted to change this password when they first sign in.

7. Click **Save User**.
8. If needed, repeat [Step 1](#) through [Step 7](#) for other existing or imported users (or [Creating a New User, page 17](#) through [Step 7](#) if creating a new user).


The *Users* screen is the last screen in the *Accounts* section. Proceed to [Email Templates, page 20](#).

## 4.6. Email Templates

The *Email Template* page is where you create and edit the email templates used when sending appointment reminders. Email templates are assigned to appointment reminders on the *Automation* screen (see [Configuring Appointment Reminders, page 12](#)).

Email templates can make use of replacement strings, which are strings of text that are automatically replaced with the relevant information once the email is sent out.

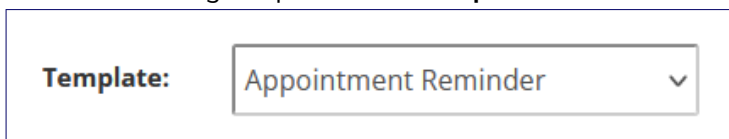
### Accessing the Email Templates Screen

- Use the side navigation menu to access the  **Templates** > *Email Templates* screen.

### Creating a New Email Template

Your text.sycle.net environment contains default templates. You can customize these (see [Editing an Email Template, page 21](#)), or create a new template by copying an existing template.

1. Select an existing template in the **Template** field.

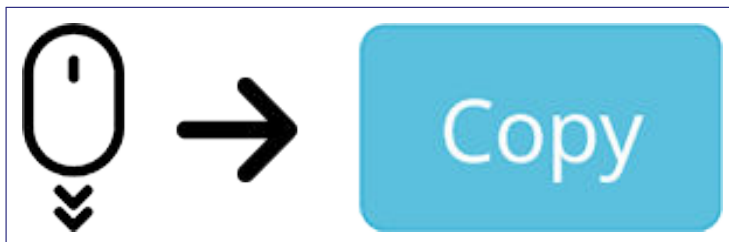


A screenshot of a form field labeled "Template:". To the right of the label is a dropdown menu with a white background and a thin border. The text "Appointment Reminder" is displayed in the dropdown, and a small downward-pointing chevron icon is visible on the right side of the dropdown box.



If applicable, select an existing template that closely resembles the new template you want to create. This reduces the amount of work needed when you proceed to edit the template.

2. Navigate to the **bottom** of the page and click **Copy**.

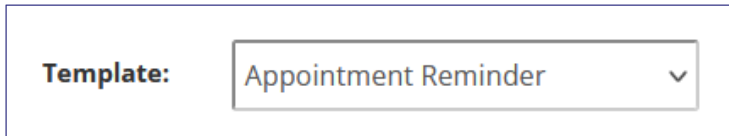


You have created a copy of the template selected in [Step 1](#). This template can now be renamed and edited. Proceed to [Editing an Email Template, page 21](#).

## Editing an Email Template

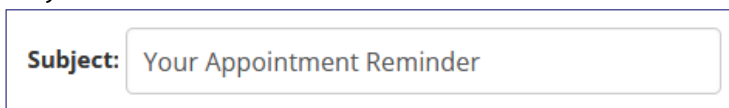
An email template can be edited to meet the needs of the various appointment reminders configured on the *Automation* screen (see [Configuring Appointment Reminders, page 12](#)).

1. Select a template in the **Template** field.



Template: Appointment Reminder

2. Enter a name in the **Name** field. This name is used to select the template on the *Email Template* and the *Automation* screen.
3. Enter a subject line in the **Subject** field. This will be the single line of text seen by the patient when they receive the reminder email.



Subject: Your Appointment Reminder

Replacement strings can be used in the **Subject** field to personalize the subject line:

### Example 3. Appointment Type, Time, Date

Your ~Appointment.Type~ at ~Appointment.Time~ on ~Appointment.Date~

Your Cleaning at 4:30pm on August 20

### Example 4. Business Name, Date

Appointment Reminder: ~Account.BusinessName~ on ~Appointment.Date~

Appointment Reminder: Sycle Clinic on August 20



You can *not* use the **Insert** button to add replacement strings to the **Subject** field. They must be entered manually.

4. Create your email message in the **Email** field.
  - Use replacement strings in the template to personalize each email for the patient, the appointment, and to insert such elements as your business name, address, and logo:

### Example 5. Default Message Template

~Contact.FirstName~ ~Contact.LastName~ has an appointment with  
~Appointment.Provider~ on ~Appointment.Date~ at ~Appointment.Time~.

John Keats has an appointment with Isabella Jones on August 20 at 4:30pm.

### Example 6. Clinic Contact Information

Our clinic is located at:  
~Account.Street1~



~Account.Street2~  
~Account.City~, ~Account.State~ ~Account.Zip~  
To re-schedule, please call us at ~Account.Phone~.

Our clinic is located at:  
4581 Round Table Drive  
Hamilton, OH 45011  
To re-schedule, please call us at 555-555-5555.

5. Test your template.
  - a. Enter an email address in the field beside the **Save/Send Email** button, then click **Save/Send Email**.
  - b. Access the inbox for the email address entered in [Step 5.a](#).
  - c. Review the test email's subject line and message.



Some replacement strings may not appear (or may appear malformed) in the test email. Examples include — but are not limited to — ~Appointment.Provider~ and ~Appointment.Type~.

- d. Return to the *Email Template* screen.
6. Click **Save**.
7. If more email templates are needed, repeat the steps in [Creating a New Email Template, page 20](#), then repeat [Step 1](#) through [Step 6](#) from this procedure.
8. Navigate to the *Automation* screen and set the **Send Email** field for the applicable appointment reminder(s) to the new email template(s).




See [Configuring Appointment Reminders, page 12](#) for more information on assigning email templates to appointment reminders.

## 4.7. SMS Templates

The *SMS Template* page is where you create and edit the SMS templates used when sending appointment reminders. SMS templates are assigned to appointment reminders on the *Automation* screen (see [Configuring Appointment Reminders, page 12](#)).

SMS templates can make use of replacement strings, which are strings of text that are automatically replaced with the relevant information once the text message is sent out.

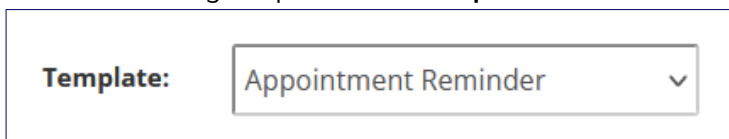
### Accessing the SMS Templates Screen

- Use the side navigation menu to access the  **Templates** > *SMS Templates* screen.

### Creating a New SMS Template

Your text.sycle.net environment contains default templates. You can customize these (see [Editing an SMS Template, page 24](#)), or create a new template by copying an existing template.

1. Select an existing template in the **Template** field.

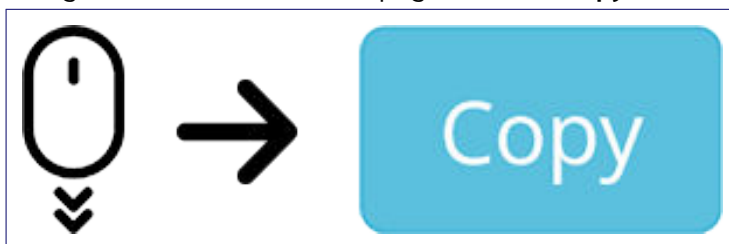


A screenshot of a form field labeled "Template:". To the right of the label is a dropdown menu with a white background and a thin border. The text "Appointment Reminder" is displayed in the dropdown, and a small downward-pointing chevron icon is visible on the right side of the dropdown box.



If applicable, select an existing template that closely resembles the new template you want to create. This reduces the amount of work needed when you proceed to edit the template.

2. Navigate to the **bottom** of the page and click **Copy**.

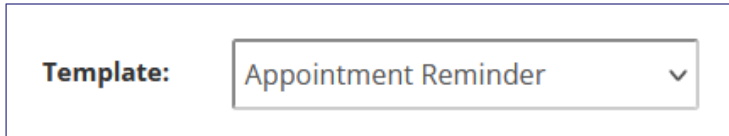


You have created a copy of the template selected in [Step 1](#). This template can now be renamed and edited. Proceed to [Step 2](#) of [Editing an SMS Template, page 24](#).

## Editing an SMS Template

An SMS template can be edited to meet the needs of the various appointment reminders configured on the *Automation* screen (see [Configuring Appointment Reminders, page 12](#)).

1. Select a template in the **Template** field.



The image shows a form field labeled "Template:" with a dropdown menu. The dropdown menu is open, showing "Appointment Reminder" as the selected option. A small downward arrow is visible on the right side of the dropdown box.

2. Enter a name in the **Name** field. This name is used to select the template on the *SMS Template* and the *Automation* screen.
3. Create your SMS message in the **Message** field.
  - Use replacement strings in the template to personalize each SMS for the patient, the appointment, and to insert such elements as your business name and address:

### Example 7. Appointment Reminder Message Example

```
REPLY YES TO CONFIRM your appt at ~Account.BusinessName~ at ~Appointment.Time~ on ~A  
Call ~Account.Phone~ if there is an issue.
```

4. Test your template.
  - a. Enter a phone number in the field beside the **Save/Send SMS** button, then click **Save/Send SMS**.
  - b. Access the device with the phone number entered in [Step 4.a](#).
  - c. Review the test SMS message.



Some replacement strings may not appear (or may appear malformed) in the test message. Examples include — but are not limited to — ~Appointment.Provider~ and ~Appointment.Type~.

- d. Return to the *SMS Template* screen.
5. Click **Save**.
  6. Navigate to the *Automation* screen and set the **Send SMS** field for the applicable appointment reminder(s) to the new SMS template(s).



See [Configuring Appointment Reminders, page 12](#) for more information on assigning SMS templates to appointment reminders.

## 5. Managing Contacts

This chapter details how to manage, create, edit, or import contacts. It also shows you how to create saved reply messages and how to use [text.sycle.net](https://text.sycle.net) to hold SMS conversations.

While this chapter is written with the initial setup of text and email reminders in mind, any relevant sub-chapter can be used to edit existing configurations.



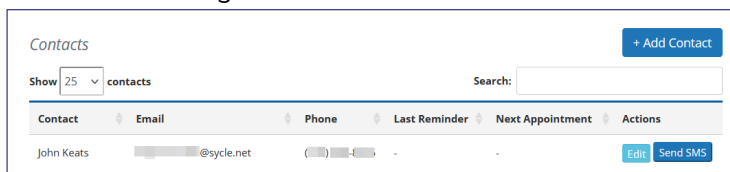
This document does not cover the *Import CSV* or the *Send Bulk Text* screens. Instructions for those features are included at the top of those screens.

### 5.1. Contacts

The *Contacts* screen is where you create<sup>2</sup>, review and edit patients' contact information. It also shows any upcoming appointments for the patients.

#### Accessing the Contacts Screen

- Use the side navigation menu to access the  **Contacts** > *Show Contacts* screen.



Contact records are automatically populated with information from Sycle.



The **Send SMS** button opens the *Conversations* screen to the contact's message history. See [Conversations, page 28](#) for more details.

<sup>2</sup>Contacts should only be created if that contact does not exist in Sycle Private Practice. See [Creating a New Contact, page 27](#).

## Editing a Contact

Contact information is imported from Sycle Private Practice. If you need to change a contact's information, follow the steps below.



Changes made to patient contact information on text.sycle.net are not sent to your Sycle Private Practice instance.

1. On the *Contacts* screen, search for the patient's record using the **Search** field.

You can use a patient's **name**, **email**, or **phone number** in the Search field.



When searching by phone number, use only numbers with a **space** between each sequence (**XXX XXX XXXX**). Using any other format — such as XXX-XXX-XXXX or (XXX)-XXX-XXXX — will not return any results.

2. Under *Actions*, click the **Edit** button on the patient's record to open the *Edit Contact* screen.

3. On the *Edit Contact* screen, edit the patient's record.
  - **First Name**
  - **Last Name**
  - **Phone:** The phone number receiving SMS messages.

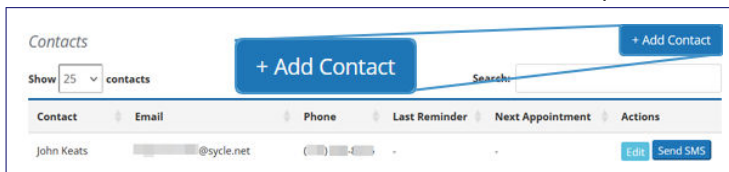
- **Email:** The email address receiving reminder emails.
- **Notes**
- **Yes / No** - I have permission to text this contact.
- **Yes / No** -I have permission to email this contact.
- (*Settings*) **Appointment Reminders: Yes / No** - Send appointment reminders for upcoming appointments.  
Set this field to **No** to *disable* appointment reminders for this contact.

4. Click **Save Contact**.

## Creating a New Contact

As patient contact information is sent to text.sycle.net from Sycle Private Practice, a contact should only be created here if that contact's information is not in Sycle Private Practice and is not going to be added to Sycle Private Practice in the future. Contacts added to text.sycle.net are not sent to your Sycle Private Practice instance.

1. On the *Contacts* screen, click **+ Add Contact** to open the *Add a New Contact* screen.



2. On the *Add a New Contact* screen, create the contact's record.

- **First Name**
- **Last Name**
- **Phone:** The phone number receiving SMS messages.
- **Email:** The email address receiving reminder emails.
- **Notes**
- **Yes / No** - I have permission to text this contact.
- **Yes / No** -I have permission to email this contact.

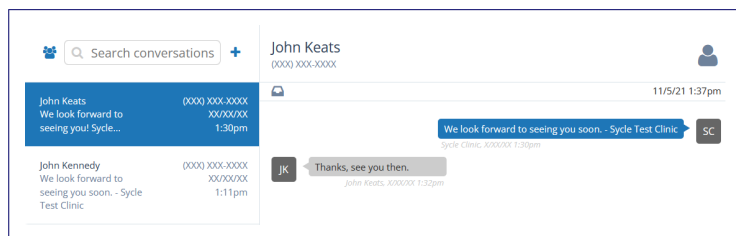


As contacts added here are not related to a patient in Sycle Private Practice and won't be linked to any appointments, the **Appointment Reminders** field (see [Step 3.8 of Editing a Contact, page 26](#)) is not present on the *Add a New Contact* screen.


3. Click **Save Contact**.

## 5.2. Conversations

The *Conversations* screen is where you can review and reply to SMS messages sent from contacts. This screen works mostly the same as a typical smartphone SMS interface.




### Accessing the Conversations Screen

- Do one of the following:
  - Use the side navigation menu to access the  **Contacts** > *Show Contacts* screen, or
  - On the *Contacts* screen, click the **Send SMS** button on the contact's record. (See [Contacts, page 25](#) for more details.)

### Filter Conversations by User

By default, the *Conversations* screen shows conversations from all users. You can filter the conversations on the screen to show only those conversations including a specific text.sycle.net user.

1. On the *Conversations* screen, click the **Filter By User**  icon.
2. Select a user.

To return to the default (all users) view, repeat [Step 1](#) and select - all users -.

### Search for a Specific Contact's Conversation

By default, all contact's conversations are shown on screen. You can navigate directly to a contact's conversation by clicking the **Send SMS** button on the contact's record (see [Contacts, page 25](#)), or you can search for a specific contact's conversation in the *Conversation* screen.

- On the *Conversations* screen, enter the contact's **first and / or last name** in the **Search conversations** field.



Partial searches are allowed. For example, entering "John Ke" would return conversations for both "John Keats" and "John Kennedy."

## Add a New Conversation

1. On the *Conversations* screen, click the **New Conversation (+)** icon.
2. If the contact's name does not appear on the screen, enter the contact's **first and / or last name** in the **Search contacts** field.



This field is the same as the **Search conversations** field, but changes to the **Search contacts** field when adding a conversation.



Partial searches are allowed. For example, entering "**John Ke**" would return conversations for both "**John Keats**" and "**John Kennedy**."

3. Select the **contact**.

## Sending Messages

The *Conversations* screen functions the same as most smartphone SMS interfaces.

- Do one of the following:
  - Type your message in the **New Message...** field, then press **Enter** or click **Send**.
  - Click the **Saved replies (+)** icon, select a reply, then press **Enter** or click **Send**.

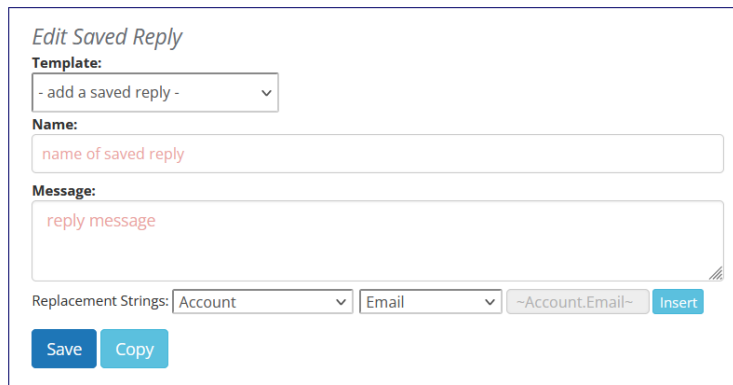


Saved replies can be configured. See [Saved Replies, page 30](#) for more details.



## 5.3. Saved Replies

Saved replies are snippets of text that can be quickly added to an SMS conversation. They are used on the *Conversations* screen (see [Sending Messages, page 29](#)).



### Accessing the Saved Replies Screen

- Do one of the following:
  - Use the side navigation menu to access the **Contacts** > *Saved Replies* screen, or
  - On the *Conversations* screen, click the **Saved replies (+)** icon and click **Edit**.

### Creating a Saved Reply

- Do one of the following:
 

If there is a similar message you want to use as a base for the new saved reply:

  - In the **Template** field, select the existing template to copy.
  - Click **Copy**.
  - Proceed to [Step 2](#).

If you are creating a new message with no similar message to copy from:

  - In the **Template** field, select - **add a saved reply** -.
  - Proceed to [Step 2](#).
- In the **Name** field, enter a name for the saved reply. This name should be descriptive, as the names are displayed on the *Conversations* screen when a user clicks the **Saved replies (+)** icon.
- In the **Message** field, enter the content of the saved reply.
  - Use replacement strings in the **Message** field to personalize the saved reply for the patient and their appointment, and / or to insert such elements as your business name and phone number.

### Example 8. Saved Reply Example

Thanks for contacting us. You can reach us at ~Account.Phone~.



Replacement strings are also defined in the **Email Templates** and **SMS Templates** chapters (see [Email Templates, page 20](#) and [SMS Templates, page 23](#)).

4. Click **Save**.
5. If additional saved replies are needed, repeat [Step 1](#) through [Step 4](#).

### **Editing a Saved Reply**

1. In the **Template** field, select an existing saved reply.
2. If needed, change the name of the saved reply in the **Name** field. This name should be descriptive, as the names are displayed on the *Conversations* screen when a user clicks the **Saved replies (+)** icon.
3. In the **Message** field, edit the content of the saved reply.
4. Click **Save**.

## 6. Glossary

The following terms are used in this document:

short message service (SMS)		A type of text communication, limited to 160 characters, and typically sent to mobile phones. More commonly called "text messages."
Voice over Internet Protocol (VoIP)		A protocol that allows voice calls to be made using an Internet connection instead of a regular phone line.

## Appendix A. Document Revision History

Rev #	Date	Description
1.0	2022-09-19	Initial release.