Live Workshop and Q&A

# Zanda Automations:

## Build Smarter Appointment Reminders. Move Beyond One-Template Limitations.

**WELCOME TO WORKSHOP**

Join Irina to build conditional reminder automations live.

# What we'll be covering today

1. Building flexible reminder templates
2. Global default appointment reminders
3. Conditional pre-appointment automations
4. Workflow for frequent no-shows
5. Q&A session

# 1. Building flexible reminder templates

*Using Merge Fields*

- **Forget Manual Typing:**
    - Use **Merge Fields** (placeholders) like {ClientFirstName} and {AppointmentTime}.
    - Use **BizzyAI: Write** for drafting your messages
- **Save Time on Billing:** Instantly attach an invoice right in the reminder using {InvoicePayLink} or {InvoicePDFAttachment}.
- **Navigation:** Tools > Communication > Templates

# 1. Building flexible reminder templates

*Using Merge Fields*

**Key merge fields for appointment reminders:**

- ❑ {ClientPreferredName} — personalises every message automatically.
- ❑ {AppointmentDate}, {AppointmentStartTime}, {AppointmentEndTime} — exact timing.
- ❑ {AppointmentLocationName}, {AppointmentLocationAddress}, {AppointmentLocationNotes} — location detail in a single field (works across all your locations automatically).
- ❑ {AppointmentServiceName}, {AppointmentPractitionerFullName} — tells the client exactly what they're booked for and with whom.
- ❑ {AppointmentAddToCalendar} — attaches an .ics file so they can add it in one click.
- ❑ {ClientTelehealthUrl} — auto-populates the client's unique telehealth link
- ❑ {ClientPortal} - auto-adds your client portal URL so clients can self-manage their appointments, invoices, forms, waitlist, and more

# 2. Setting Up Global Reminders

## *The Foundation of Your Communication*

- **The Goal**: Prevent forgotten appointments automatically.
- **The "Rule of Three"**: Zanda allows up to three reminders per appointment.
- **Recommendation**: 7 & 3 Days (Email) & 2 Days (SMS).
- **Navigation**:
  - Account-level: User Menu > Account Settings > Communication > Reminders
  - Client-level: Client Profile > Appointment Reminders

# 3. Setting Up Global Reminders: Two-Way SMS

*Did you know your clients can confirm their own appointments?*

- **Reply "Y" or "Yes"** 👉 Appointment automatically turns Confirmed on your calendar.
- **Reply "N" or "No"** 👉 Appointment automatically turns Cancelled.
  - Invoices remain untouched, securing your cancellation fee!

- 💡 **Pro Tips & Pitfalls to Avoid**

  - **The iPhone Emoji Trap**: Sending “Heart” or "Thumbs Up" emojis to your SMS number might act as a cancellation. Instruct clients to strictly text "Y" or "N".
  - **The "CANCEL" Keyword (US/Canada):** Texting "CANCEL" blocks mobile carrier texts entirely. Always tell clients to reply "No".
  - **Multiple Appointments**: If a client has 2 or more  appointments on one day, replying "Y" will only confirm one. Keep an eye on your SMS messaging panel!

# 3. Conditional Pre-Appointment Automations

*Sending the right info at the right time*

❑ **What is an Automation?**
Simply put, it's an "If This, Then That" messaging rule.

❑ **Why use them?**
Automations let you send specific instructions, links, or intake forms targeted by rules you set up. They send at 2 pm your local time.

❑ **Navigation**:
User Menu > Account Settings > Communication > Automations

❑ **The Condition (If This)**:
e.g., "4 days before appointment date"

❑ **The Action (Then That)**:
Send an Email, an SMS, or generate an internal Task.

# 3. Conditional Pre-Appointment Automations

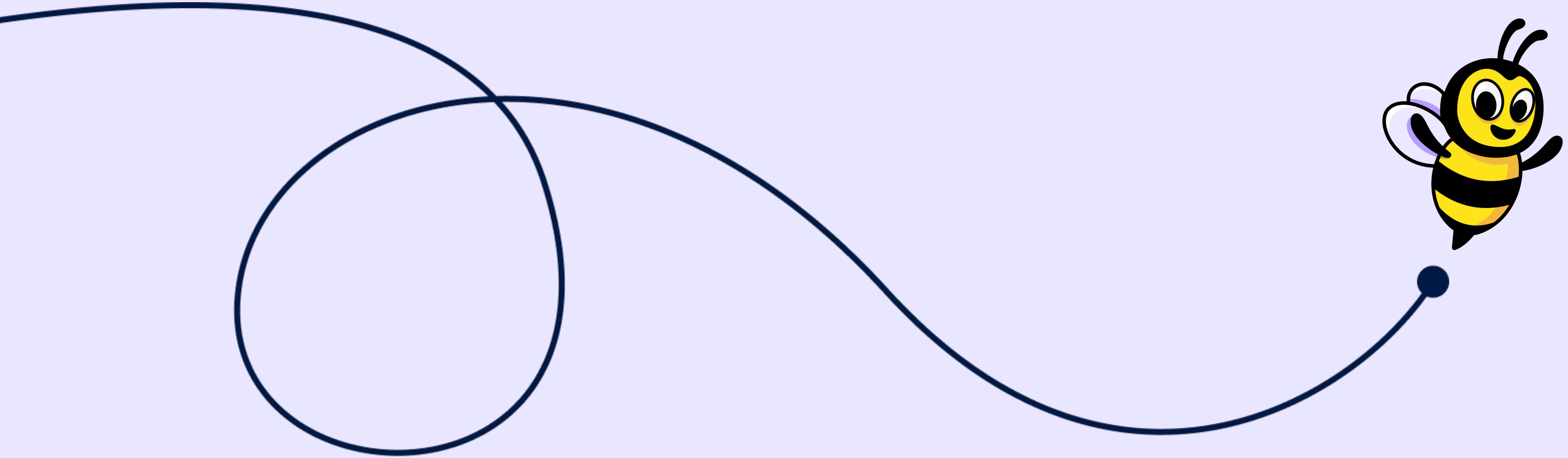
*Sending the right info at the right time*

| Condition | Use case example |
|---|---|
| **Days before appointment** | Send telehealth link 2 days before; send intake forms 5 days before |
| **Appointment Location** | Different instructions for each clinic address |
| **Appointment Status** | Only fire for "Confirmed" — filter out tentative bookings |
| **Appointment Service** | Initial consultation gets a different message than a follow-up |
| **Appointment Flag** | Trigger a stricter reminder for flagged clients |
| **Client Status** | Different message for "Active" vs "New" clients |
| **Practitioner** | Practitioner-specific instructions (parking, room number, etc.) |
| **Client Type** | NDIS clients vs private clients vs telehealth-only clients |
| **Client Classifications** | Risk-based classifications (covered in Segment 5) |
| **Telehealth Status** | On/Off — send telehealth link only to telehealth appointments |

# 4. Workflow For High-Risk No-Show Clients

## Turn a frustrating problem into a managed process.

- ❑ **Step 1:** Create a "High-Risk No-Show" client Classification and Appointment Flag.
- ❑ **Step 2:** Apply the classification and the Flag to the client inside their Profile > Classifications and Admin > Manage.
- ❑ **Step 3**: Create a Pre-Appointment Automation
  - ❑ **Conditions**: Client Classification and Appointment Flag = High-Risk No-Show
  - ❑ **Trigger**: 2 Days Before
  - ❑ **Action**: Create Task for staff ("Please call client to verbally confirm")
- ❑ **Step 4 (optional)**: Override their individual profile reminders to max out all 3 notices!
  - ❑ Use specific reminder templates with **cancellation policy** highlighted



# Thank you for watching!

## Q&A time

zanda