

SMS Appointment Confirmation & Reminder

R/C Service Line

Overview

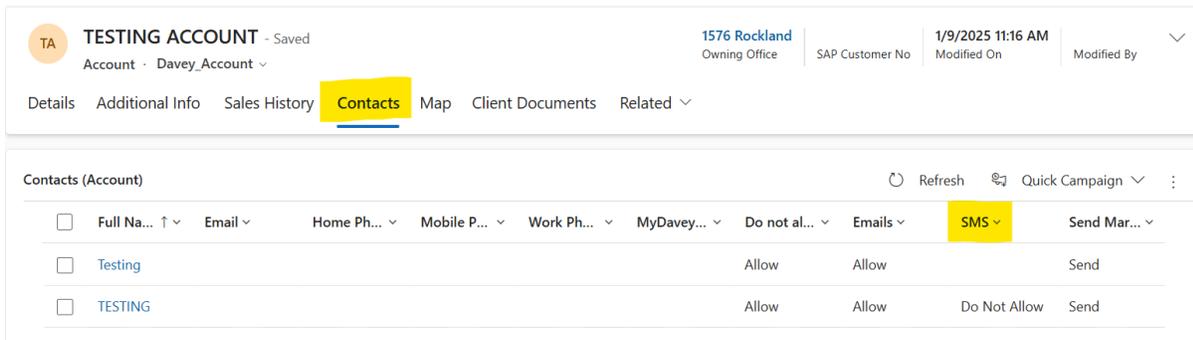
Appointment confirmation text messages can now be sent through CRM. These instructions will guide you through how to get clients opted in and how to send these messages.

Opting-In to SMS

For clients to begin receiving text messages, they will need to opt-in. They can do so 3 ways:

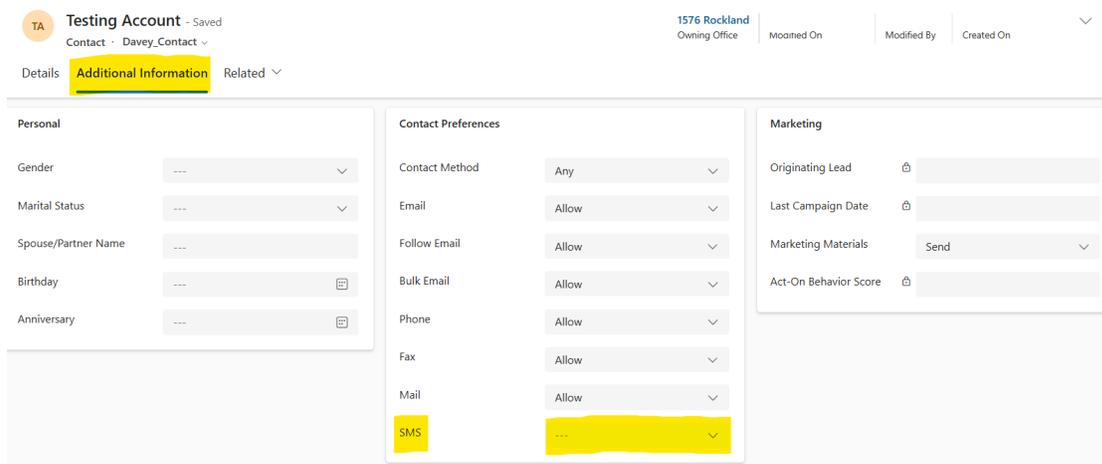
1. Through the Local Office:

- Once a client agrees to opt-in, you will need to visit the Contacts section of their account.



The screenshot shows the CRM interface for a 'TESTING ACCOUNT'. The 'Contacts' tab is highlighted. Below the account header, there is a table of contacts with columns for checkboxes, 'Full Name', 'Email', 'Home Ph...', 'Mobile P...', 'Work Ph...', 'MyDavey...', 'Do not al...', 'Emails', 'SMS', and 'Send Mar...'. Two contacts are listed: 'Testing' and 'TESTING'. The 'SMS' column for both contacts is set to 'Allow'.

- Select the contact you need to update and click on the **Additional Information** section. Add their **phone number** and **date of opt-in** and **save**.



The screenshot shows the 'Additional Information' section for a contact. It is divided into three columns: 'Personal', 'Contact Preferences', and 'Marketing'. The 'SMS' option under 'Contact Preferences' is highlighted in yellow, and its value is set to 'Allow'.

2. Through MyDavey Portal Account:

Clients can also opt-in by logging into their MyDavey Portal account:

- Visit: **Account.davey.com** to Login or Register (please note: a property must be added to the account to update communication preferences).
- Select **Account > Profile Details > Receive SMS/Text Alerts > Add Phone Number**. Then click **Save**.

3. Through Web Forms:

Prospects may also opt-in when they fill out a web form on Davey.com:

- I'd like to receive text updates about details related to my account with Davey Tree and its subsidiaries. Message frequency varies, and message and data rates may apply. View [Terms of Use](#) & [Privacy Policy](#).

Confirm Mobile Number *

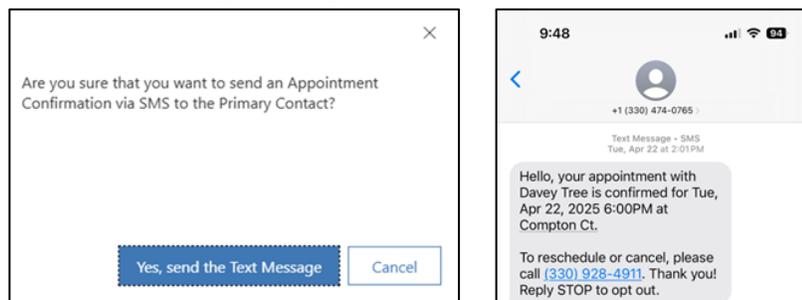
Using CRM to Send Appointment Confirmation via SMS

Once an appointment is made, you'll have the option to send a reminder via email or SMS. **The SMS option will not appear unless a client has been opted in to SMS.**

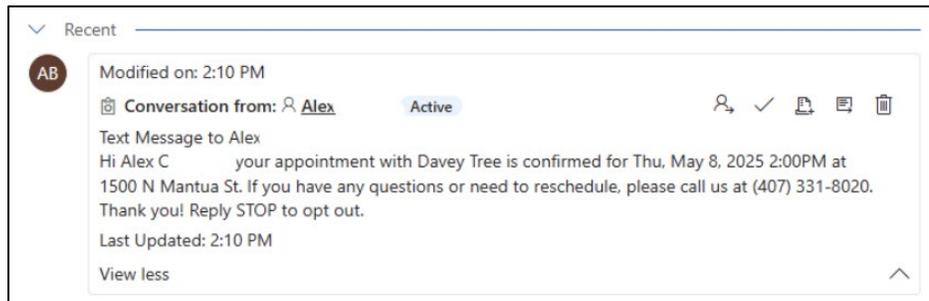
Once the appointment has been saved, you can select the 'Send Confirmation' button on the top bar. Select 'By SMS' and you'll receive a prompt to send the message.



Once the message is sent, you'll receive the following pop-up. Select **Yes, send the Text Message**. Your client will receive the following message:



The message will also be recorded on the timeline:



Appointment Reminders

Appointment reminders will be automatically sent to clients 24 hours before the appointment. You will not need to do anything to initiate these reminders. They will be sent out for appointments that:

- Are created more than 24 hours in advanced
- Have the contact on the account opted in to SMS
- Are not an all-day event (NST)

They will NOT be sent for CSV appointments. If you schedule an appointment at a specific time, and it follows the rules above, a reminder will be sent out. These reminders will also show on the account timeline so you can see if they have been sent.

FAQs

Q: Do clients need to opt-in to SMS?

A: Yes, clients will need to be opted-in to receive SMS messages and future automated messages.

Q: Where can clients opt-in?

A: Clients who are interested in opting in can do so by:

- Confirming with their local office they'd like to be opted in. The office will need to update opt-in preferences in Dynamics.
- By logging into their MyDavey Portal account and changing their communication preferences:
 - Visit: **Account.davey.com**. Login or Register (please note: a property must be added to the account to update communication preferences).
 - Select **Account > Profile Details > Toggle Receive SMS/Text Alerts** and add Phone Number. Then click **Save**.
- Prospective clients may also opt-in to receive SMS messages when filling out a form on Davey.com.

Q: When should I send an appointment confirmation message?

A: Appointment confirmation messages should be sent for scheduled appointments with set dates and time. The following message will be sent:

*Hello, your appointment with Davey Tree is confirmed for [DATE AND TIME] at [ADDRESS].
To reschedule or cancel, please call [OFFICE PHONE]. Thank you! Reply STOP to opt out.*

It is not recommended to send these appointment confirmation messages for NST appointments, as the message will just display the date you have scheduled it for, not the window of time. If you do send a message for NST appointments, the message will read as:

*Hello, your appointment with Davey Tree is confirmed for [DATE] at [ADDRESS].
To reschedule or cancel, please call [OFFICE PHONE]. Thank you! Reply STOP to opt out.*

Q: Will I get confirmation that the text message was sent?

A: Appointment confirmations will be shown on the client's timeline. You can visit the timeline history to confirm when and if a message was sent to the client.

Q: What if the client has a question after I send the message?

A: The automated message directs clients to call the office for any questions and includes the office phone number.

Q: What if I need to update the appointment time or date?

A: You will need to send another appointment confirmation message if the date or time changes.

Q: What if my client does not want to receive text messages?

A: Text messaging is an optional form of communication and should be used only for clients that opt-in to receive text messages.

Q: What if I have more questions about SMS?

A: Please contact Dynamics365@davey.com for any other questions regarding SMS.