

email confirmations

Confirm your appointments via email and reduce your outbound calls using Email Confirmations.

Creating Message Templates

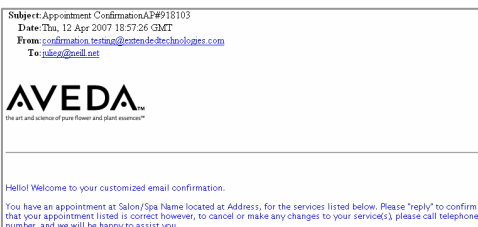
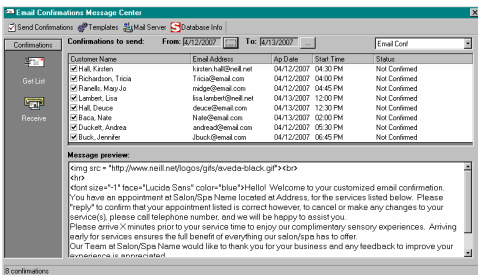
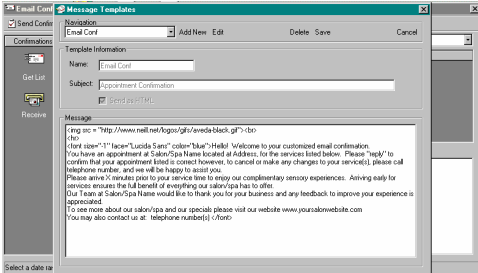
1. Open the Email Confirmations Message Center.
2. Click the Templates icon on the menu bar.
3. Click Add New.
4. Type in the name of the template in the Name field (Example Main Template).
5. Type in the name of the message subject in the Subject field (Example 'Location Name' Confirmations).
6. Create a message template in the Message field.
7. Click Save to save this message template. Exit the template screen.
8. Repeat steps 1-7 for all message templates you wish to create.

Sending Email Confirmations

1. Open the Email Confirmations Message Center.
2. If you have multi-locations, select the location for the appointment confirmations that you will be sending.
3. In the From/To field set the date range for the appointment confirmations you wish to send (you must use the buttons to set date ranges).
4. From the drop down menu, select a message template.
5. Click the Get List icon (you can uncheck any clients that should not receive the email confirmation).
6. Click on Send Confirmations icon on the menu bar.
7. A box will pop up confirming that your message has been sent.
8. Once the email is sent, the status of those appointments will change to Left Message.
9. You may close the message center.

Receiving Email Confirmations

1. Open the Email Confirmations Message Center.
2. Click the Receive icon.
3. Place a check in the box for all appointments you wish to mark as confirmed.
4. Click the Confirm Appointments icon on the menu bar.
5. Print any email responses when receiving by clicking the Print icon on the menu bar.
6. Close the message center.



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Frequently Asked Questions

Will all of the customers for the selected appointment date range be sent an email confirmation?

No. Only customers that have email noted as their primary form of contact (in their customer file) with a full email address will be notified.

Can I find out which customers have an email address?

Sure. Simply create the Customers With An Email report found in the Customer subcategory of the Reports area.

Can I write a message in html format?

Yes, Email Confirmations supports html format.

Can I send out an email blast for something other than confirmations?

Not at this time, but you can export the email report to various file types. This allows you to insert them to your email client.

Customer Support 888.809.2802

Our Customer Support team is ready to assist you.

