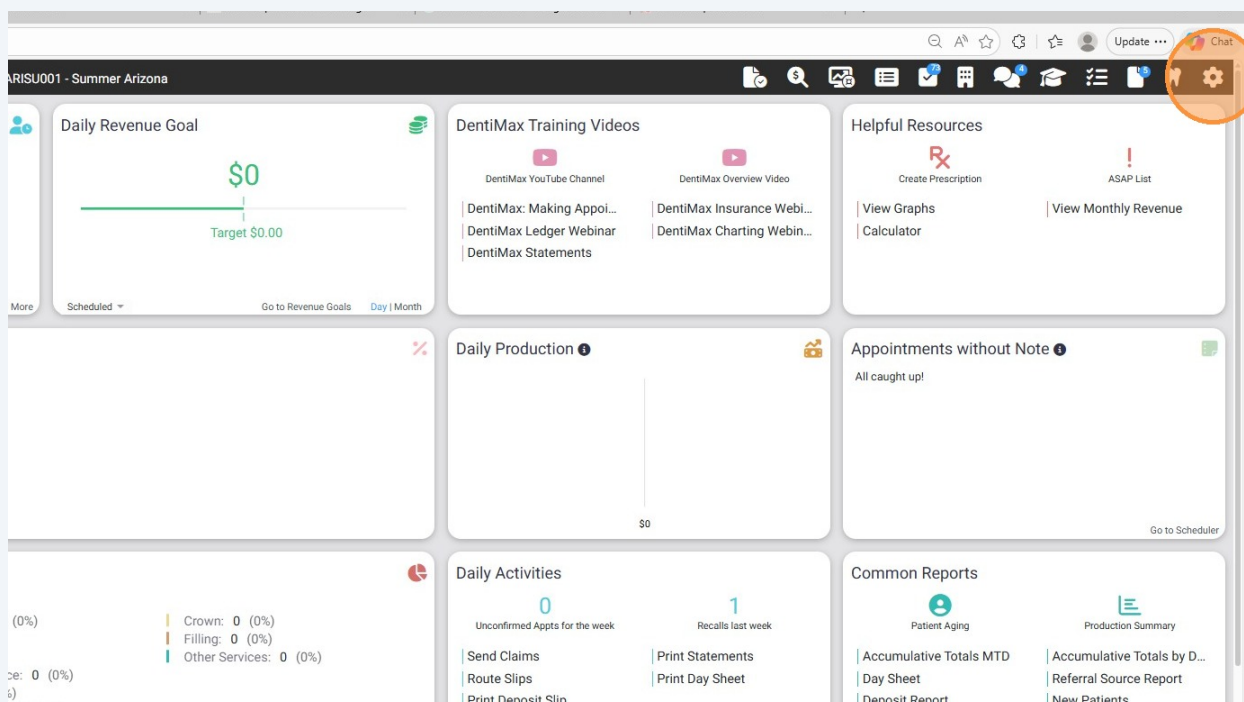


Create and Send Post-Appointment Review Requests

Learn how to set up automated messages that prompt patients to leave reviews after their appointments. This guide walks you through configuring review request timings and ensuring your review links are correctly formatted for easy patient access.

1 Click the "gear" icon to enter practice setup



2 Click "Setup"

The screenshot shows a dashboard for 'ARISU001 - Summer Arizona'. The user profile menu is open, and the 'Setup' option is highlighted with an orange circle. The dashboard includes several widgets: 'Daily Revenue Goal' showing \$0 against a \$0.00 target; 'DentiMax Training Videos' with links to YouTube Channel, Overview Video, and various webinars; 'Helpful Resources' with links for Prescription, Graphs, and Revenue; 'Daily Production' with a graph; 'Appointments without Note' showing 'All caught up!'; 'Daily Activities' with metrics for Unconfirmed Appts (0) and Recalls (1); and 'Common Reports' including Patient Aging, Production Summary, and various financial reports.

3 Click "Automated Messages"

The screenshot shows the 'Practice Setup' screen for 'John's Dental Practice'. The 'Automated Messages' option in the left sidebar is highlighted with an orange circle. A tooltip points to this option, stating 'Appointment reminders and other automated messages'. The main form area is titled 'Practice Information' and contains fields for Practice Name, Street, Street 2, City, State, Postal Code, Country, Phone 1, Fax, Bank Account, Default Area Code, and Tooth System.

4 Click "Post-Appointment"

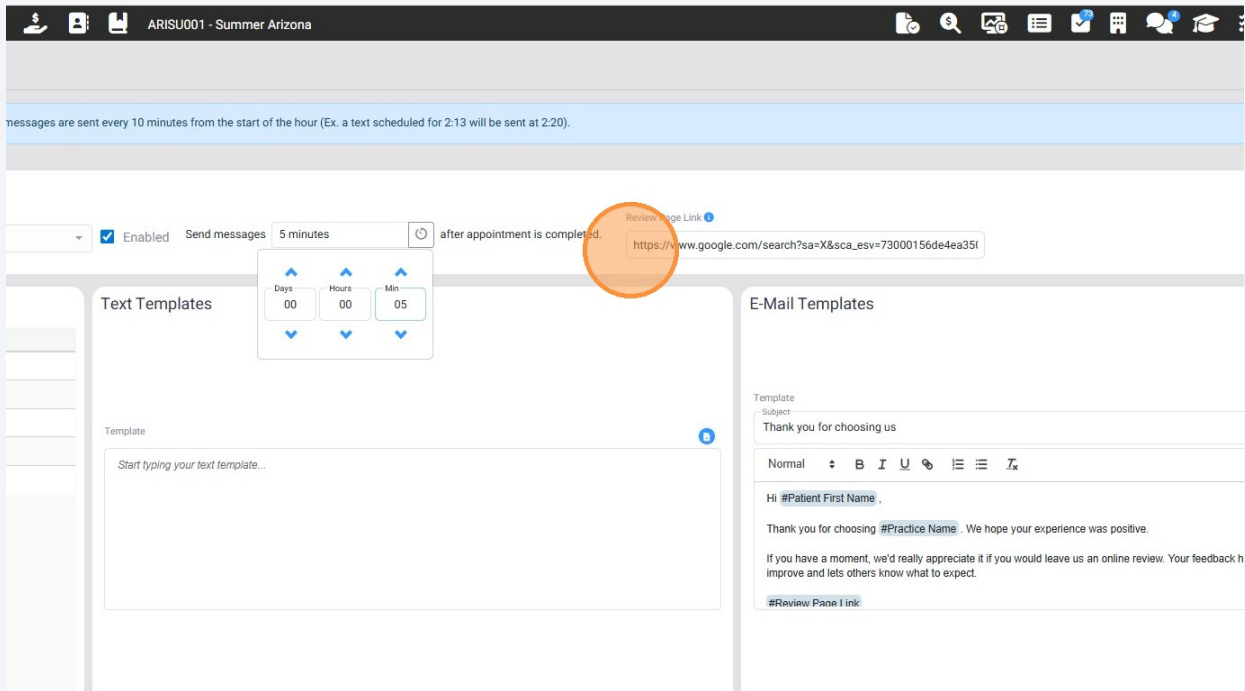
The screenshot shows the 'Automation Details' configuration page. On the left sidebar, the 'Post-Appointment' option under the 'Automated Messages' section is circled in orange. In the main content area, the 'Automation Details' section shows 'Language' set to 'English', 'Enabled' checked, 'First Reminder' set to '2 days before appointment', and 'Second Reminder' set to 'Same day as appointment'. Below this, the 'Category' list includes 'Appointment Reminders', 'Birthdays', 'Recall Reminders', 'Statements', and 'Post-Appointment' (circled in orange). The 'Text Templates' section shows two templates: 'Unconfirmed' and 'Previously Confirmed'. The 'E-Mail Templates' section shows two templates: 'Unconfirmed' and 'Previously Confirmed'.

5 Once you have click the "Enabled" box to turn this feature on:

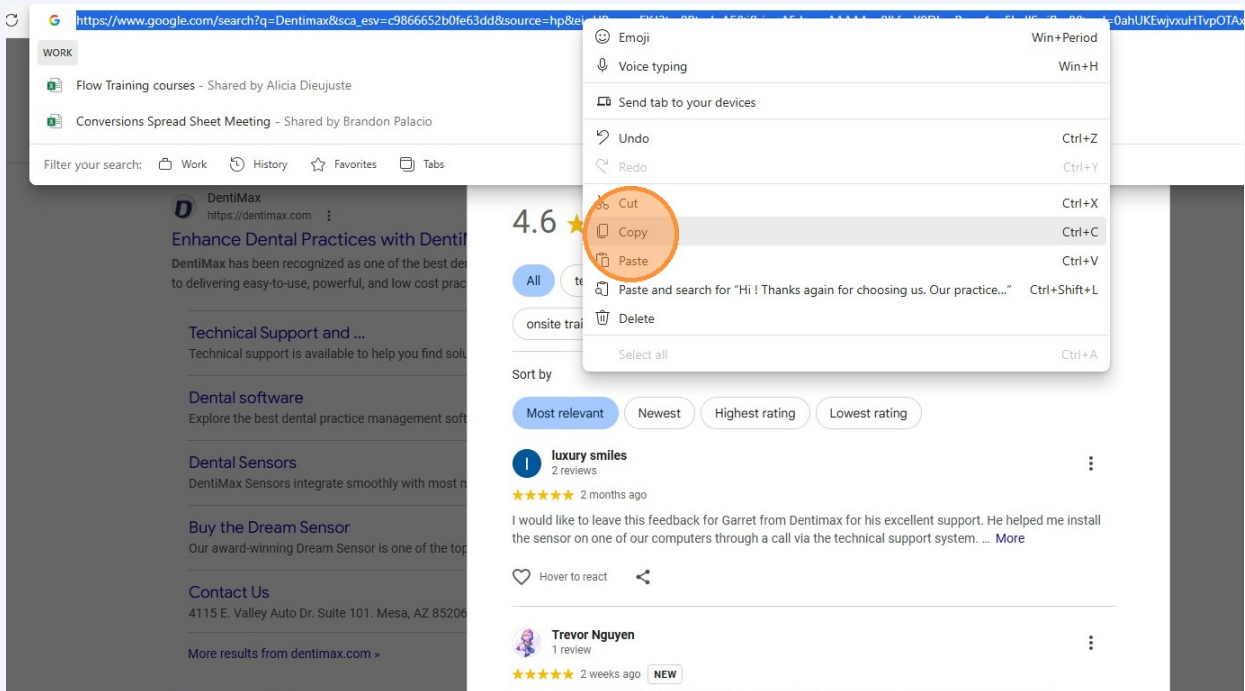
Select the time frame you want to set the message to go out from the dropdown menu

The screenshot shows the 'Automated Messages' configuration page. The 'Send messages' dropdown menu is open, and the '5 minutes' option is selected. The 'Enabled' checkbox is checked. The 'Review Page Link' is visible. The 'Text Templates' section shows a text area with the placeholder 'Start typing your text template...'. The 'E-Mail Templates' section shows a template with the subject 'Thank you for choosing us' and the body text 'Hi #Patient First Name, Thank you for choosing #Practice Name. We hope your ex... If you have a moment, we'd really appreciate it if you would improve and lets others know what to expect. #Review Pane I ink'.

6 You will need to have the link to your review site.



7 Click "Copy Ctrl+C"



8 Paste the link into the Review Page Link box

The screenshot shows a web application interface for configuring automation. At the top, a status bar indicates "ARISU001 - Summer Arizona". Below it, a blue banner states: "Automated and scheduled text messages are sent every 10 minutes from the start of the hour (Ex. a text scheduled for 2:13 will be sent at 2:20)." The main configuration area includes a "Review Page Link" field with a blue circular icon, containing the URL "https://www.google.com/search?sa=X&sca_esv=73000156de4ea35f". To the left, there are sections for "Text Templates" and "E-Mail Templates". The "Text Templates" section has a text input field with the placeholder "Start typing your text template...". The "E-Mail Templates" section shows a preview of an email template with a subject "Thank you for choosing us", a greeting "Hi #Patient First Name", and a body of text including "Thank you for choosing #Practice Name. We hope your experience was positive." and "If you have a moment, we'd really appreciate it if you would leave us an online review. Your feedback helps us continue to improve and lets others know what to expect." A "#Review Page Link" placeholder is visible at the bottom of the email preview.

9 In the Text Template box: Create the message that you want to be sent to patients

The screenshot shows the same automation settings interface as in step 8, but with a focus on the "Text Templates" section. The "Review Page Link" field now contains a different URL: "https://www.google.com/search?sa=X&sca_esv=73000156de4ea35f&uact=5&oq=Dentimax&gs_l=Egdnd3Mtd2l6lghEZW". The "Text Templates" section is highlighted with a blue circle, showing the text input field with the placeholder "Start typing your text template...". The "E-Mail Templates" section is also visible, showing the same email preview as in step 8. On the left side of the interface, there is a navigation menu with various categories: "Practice Information", "Additional Setup", "Patient Communication", "Patient Portal", and "Accounting Setup". The "Patient Communication" section is expanded, showing options like "Automated Messages", "Custom Templates", "Additional Settings", "SMS Opt-out", and "Document Center".

10

You will use the Blue "Insert Field" dropdown in order to merge system information into the message.

Enabled Send messages 5 minutes after appointment is completed. Review Page Link https://www.google.com/search?q=Dentimax&sca_esv=c9866652bc

Text Templates

Template

Hi|

E-Mail Templates

Template

Subject

Thank you for choosing us

Normal B I U

Hi #Patient First Name .

Thank you for choosing #Practice Name . We hope your experience was positive.

If you have a moment, we'd really appreciate it if you would leave us an online review. Your feedback helps us continue to improve and lets others know what to expect.

#Review Page Link

11

To use the merge fields; as you are typing your message open the merge dropdown and select the information you want to merge.

Appointment Details

Enabled Send messages 5 minutes after appointment is completed. Review Page Link https://www.google.com/search?q=Dentimax&sca_esv=c9866652bc

Text Templates

Template

Hi

E-Mail Templates

Template

Subject

Thank you for choosing us

Patient First Name
Patient Last Name
Assigned Provider Name
Assigned Provider Full Name
Practice Name
Practice Phone
Appointment Provider Name
Appointment Day of Week
Appointment Date
Appointment Time
Appointment Resource Code
Appointment Resource Description
Review Page Link

12 The merge field will show up slightly highlighted in the text

The screenshot displays a configuration page for sending messages. At the top, there are settings for "Enabled" (checked), "Send messages" (5 minutes), and "after appointment is completed." A "Review Page Link" is provided as https://www.google.com/search?q=Dentimax&sca_esv=c9866652bc. Below these settings are two panels: "Text Templates" and "E-Mail Templates".

In the "Text Templates" panel, a text area contains the following text: "Hi #Patient First Name ! Thanks again for choosing us. Our practice recognizes our team's work by the quality of the reviews we receive online, and a quick online review from you would mean a lot to us. We appreciate you!". A blue box highlights the merge field "#Patient First Name". A callout bubble with the text "Merge Field" points to this field.

The "E-Mail Templates" panel shows a preview of the email. The subject is "Thank you for choosing us". The body text is: "Hi #Patient First Name . Thank you for choosing #Practice Name . We hope your experience was positive. If you have a moment, we'd really appreciate it if you would leave us an online review. Your feedback helps improve and lets others know what to expect." Below the text is a link labeled "#Review Page Link".

13 You MUST use the merge field #Review Page Link in order for the hyperlink to your review site to be active

This screenshot is similar to the previous one, showing the same configuration page. The "Review Page Link" is the same. In the "Text Templates" panel, the text area contains: "Hi #Patient First Name ! Thanks again for choosing us. Our practice recognizes our team's work by the quality of the reviews we receive online, and a quick online review from you would mean a lot to us. We appreciate you! #Practice Name #Review Page Link". A blue box highlights the merge field "#Review Page Link". A callout bubble with the text "Merge Field" points to this field.

The "E-Mail Templates" panel shows a preview of the email. The subject is "Thank you for choosing us". The body text is: "Hi #Patient First Name . Thank you for choosing #Practice Name . We hope your experience was positive. If you have a moment, we'd really appreciate it if you would leave us an online review improve and lets others know what to expect." Below the text is a link labeled "#Review Page Link".

14

Be sure to Save Changes once you have your message set the way you want it to display.

The screenshot shows a web interface for configuring templates. At the top, there's a browser window with the title "ARISU001 - Summer Arizona". Below the browser window, there's a notification bar that says "Messages are sent every 10 minutes from the start of the hour (Ex. a text scheduled for 2:13 will be sent at 2:20)".

The main configuration area has a "Review Page Link" field with the value "https://www.google.com/search?q=Dentimax&sca_esv=c9866652b0". Below this, there are two columns: "Text Templates" and "E-Mail Templates".

Text Templates: A text area contains the following text: "Hi #Patient First Name ! Thanks again for choosing us. Our practice recognizes our team's work by the quality of the reviews we receive online, and a quick online review from you would mean a lot to us. We appreciate you! #Practice Name #Review Page Link".

E-Mail Templates: A rich text editor contains the following text: "Hi #Patient First Name . Thank you for choosing #Practice Name . We hope your experience was positive. If you have a moment, we'd really appreciate it if you would leave us an online review. Your feedback helps us continue to improve and lets others know what to expect. #Review Page Link".

15

This is an example of a message requesting a review. Please feel free to create your own message to fit your practice needs.

The screenshot shows a text template editor. The text area contains the following text: "Hi #Patient First Name ! Thanks again for choosing us. Our practice recognizes our team's work by the quality of the reviews we receive online, and a quick online review from you would mean a lot to us. We appreciate you! #Practice Name #Review Page Link".