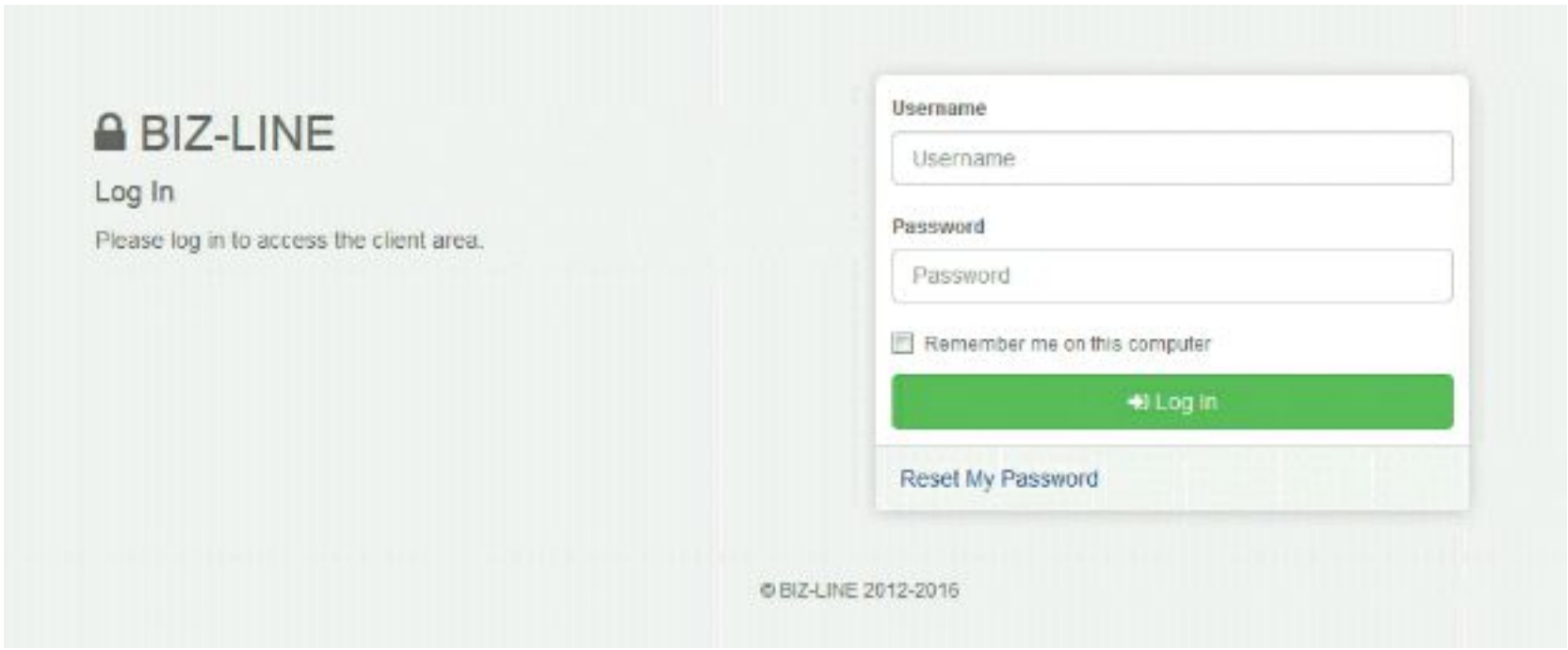
Quick User Guide - Appointment Reminder

Appointment Reminder is the most convenient and easy to use tool that automates telephone appointment confirmations, cancellations and reschedules. All you need to do is to specify phone numbers and names to be called, and the service will automatically call your list at a selected time to allow the recipient to confirm, cancel or reschedule an appointment. You have the full flexibility to control all call details, from the number of retry attempts to choosing how far in advance clients need to be notified.

To manage your Appointment Reminder please follow the steps below:

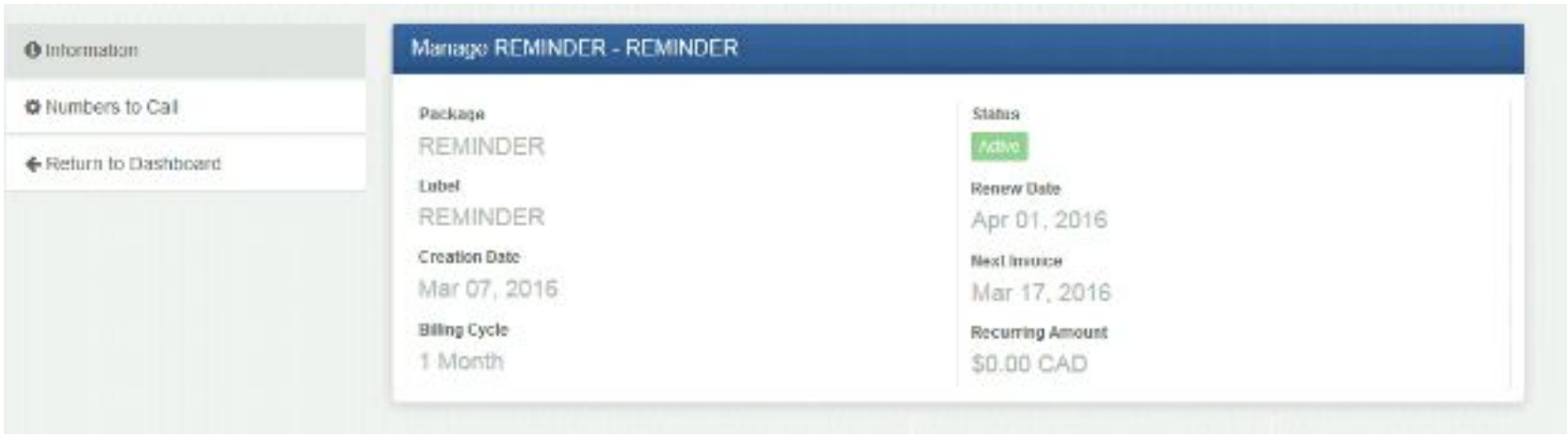
1. Access our Online Portal at https://myaccount.biz-line.ca/client/login/



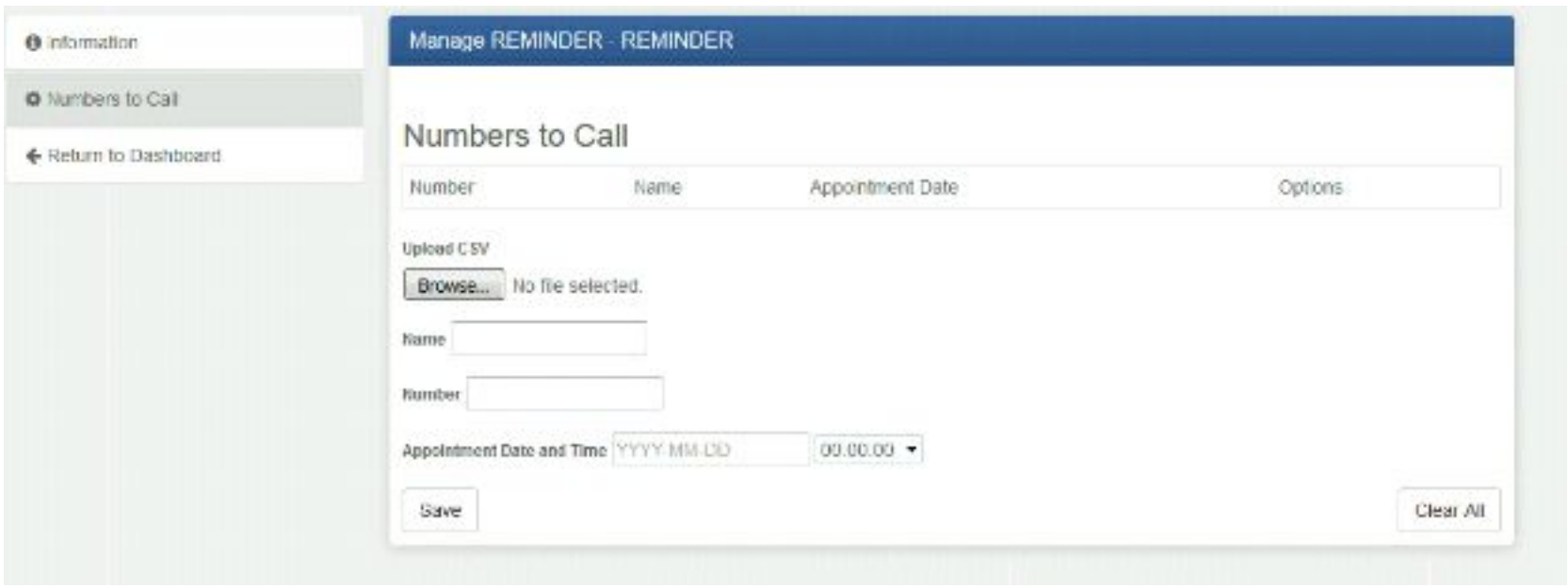
2. Sign in to your account using your Username (your e-mail address) and Password that you received in your welcome email. If you forgot the password, you can reset it using the Reset My Password option. Just click on the link and follow the instructions you receive in the email.

3. Once you are logged in, go to Services --> Appointment Reminder. Select Manage.

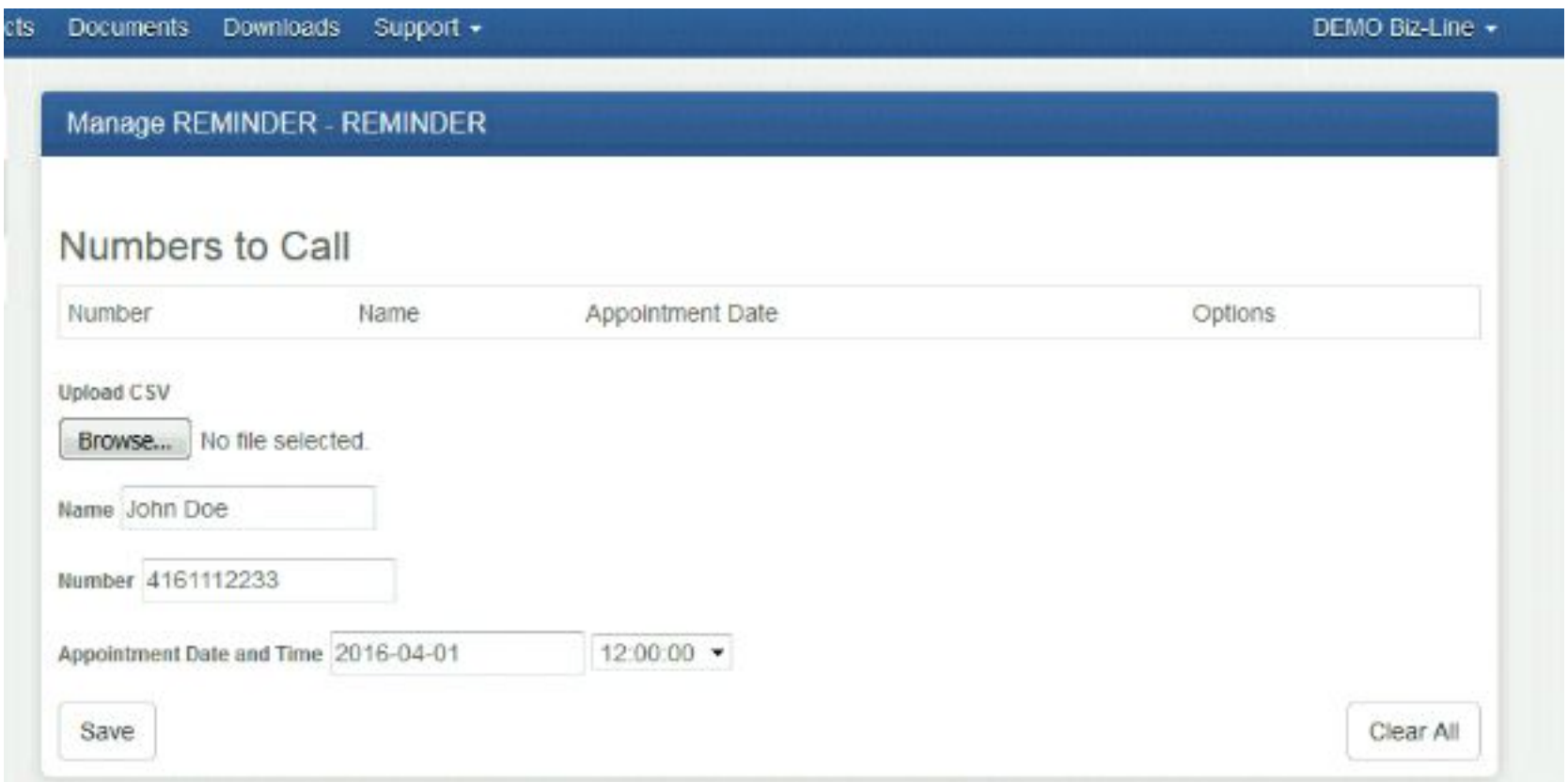
4. On the left, you will see several options. Click Numbers to Call.



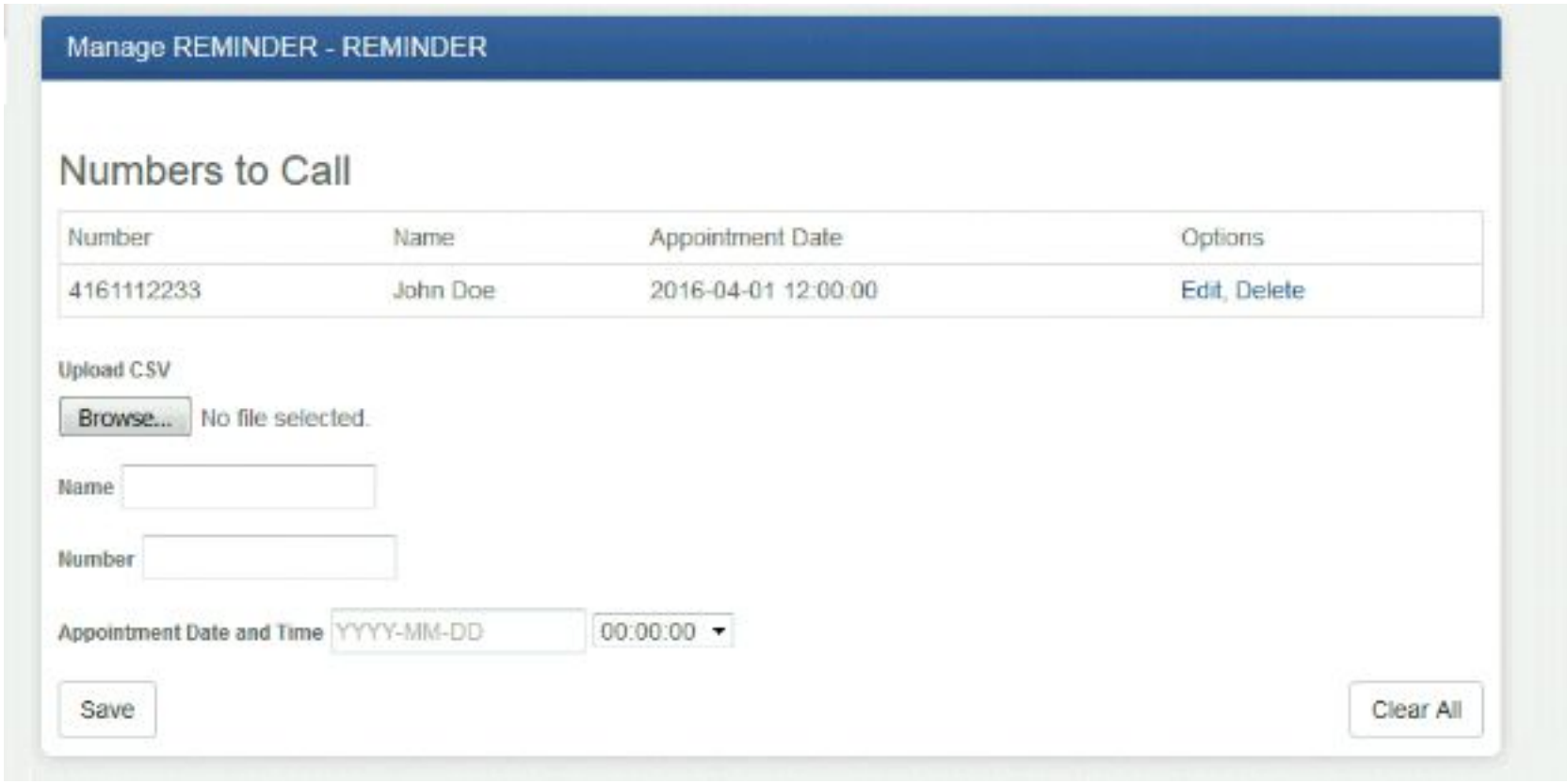
5. Here, you will be able to add and remove numbers to be called and edit your call list.



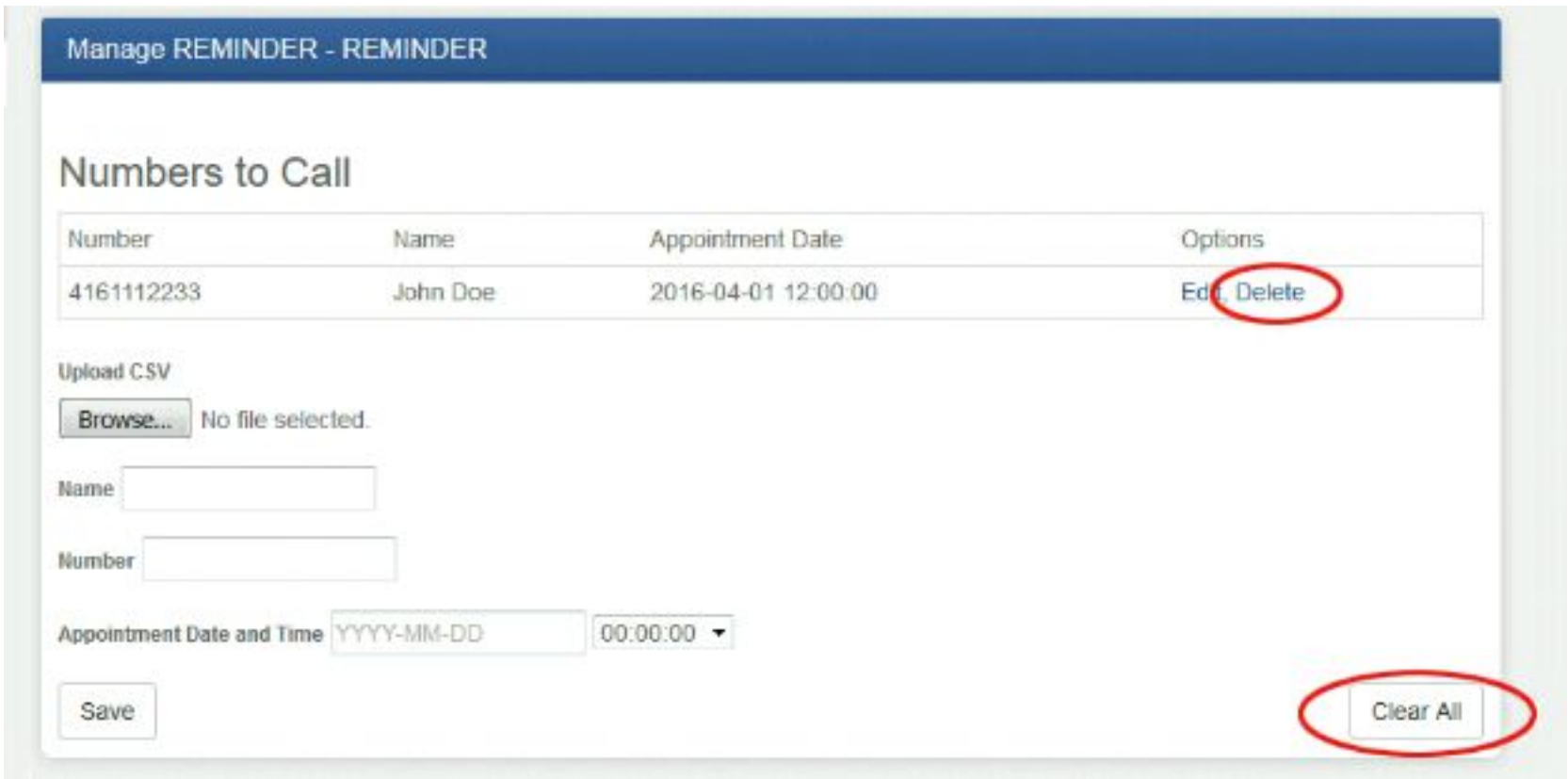
6. You may add phone numbers manually by entering the recipient name, phone number, appointment date and time directly into the form.



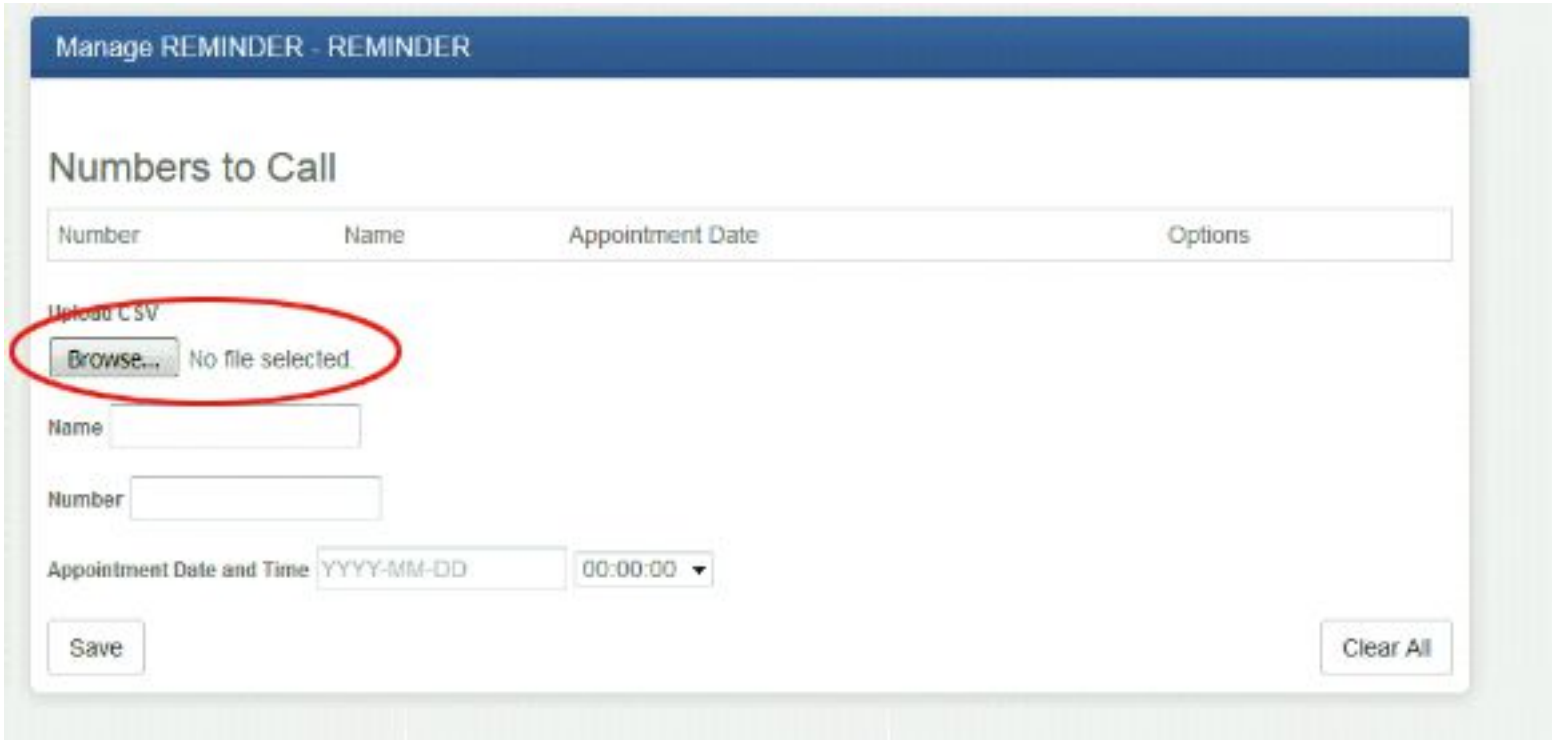
Press Save to add the number to your calling list.



Every number on your list has a Delete button on the right, which removes the entry from the list. If you select Clear All, it will remove all entries on the list.



7. You may also import a list of numbers by uploading a CSV file.

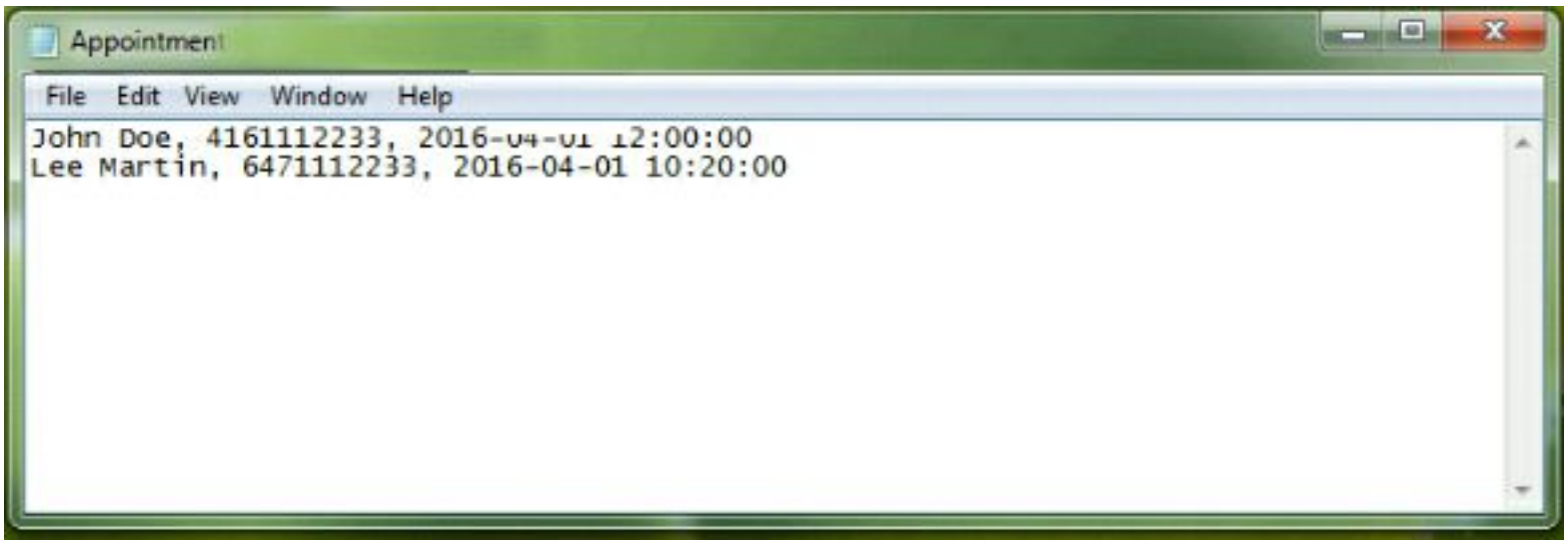


It needs to be formatted in the following way:

Name, Phone Number, Date (YYYY-MM-DD HH:MM:SS)

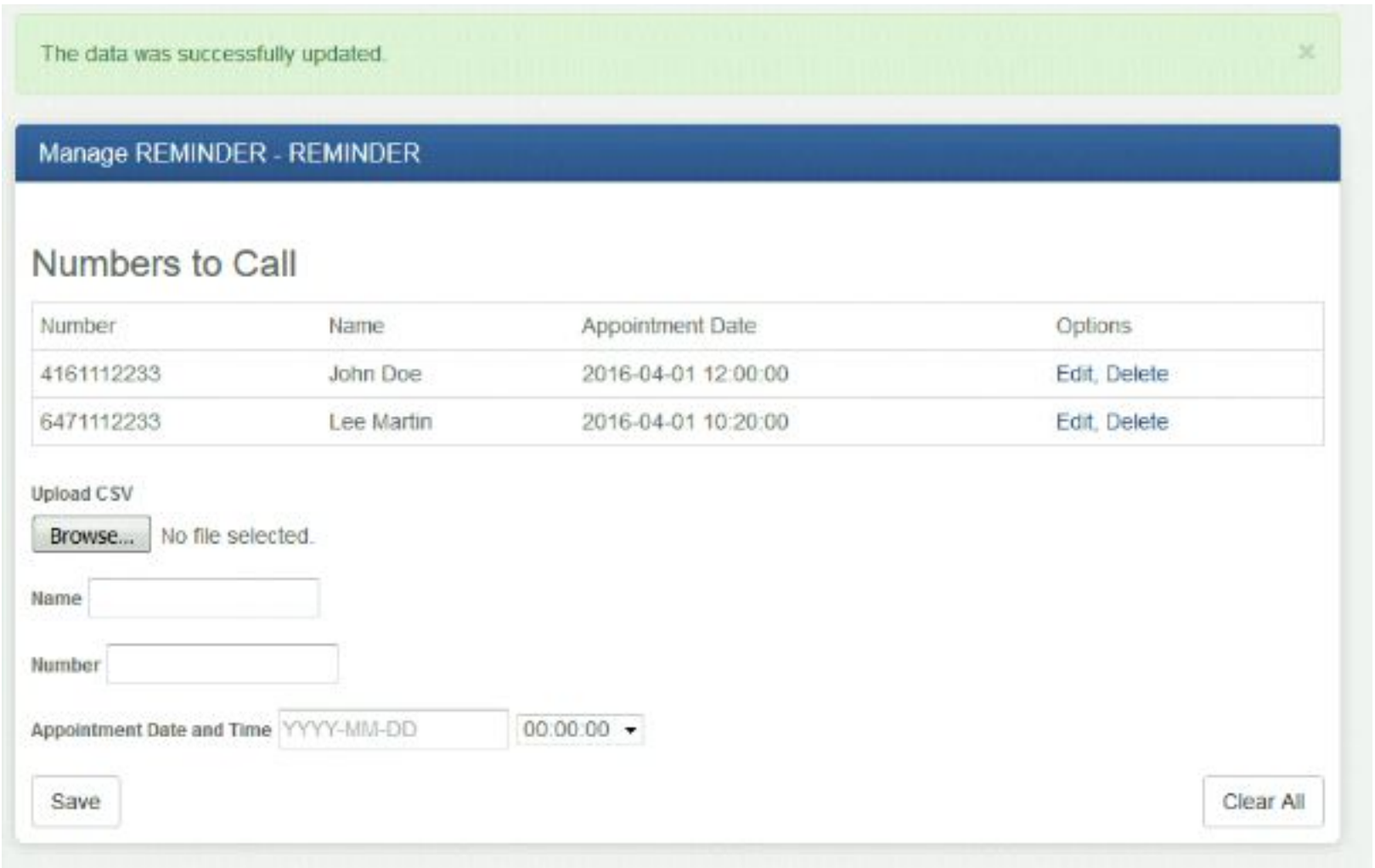
For example: John Doe, 4161112233, 2016-04-01 12:00:00

Lee Martin, 6471112233, 2016-04-01 10:20:00



When the list is ready to be uploaded, click on Browse to select the file and press Save.

Your calling list will be updated accordingly.



You may update the list any time. All changes will be applied immediately. The automatic dialer will begin calling the customers on your list 2 days before their appointment time, trying to reach a live person up to 3 times until it receives a reply (a confirmation, a cancellation or a reschedule request). A detailed report will be emailed to you.

Please note that the pre-recorded audio files, the outgoing Caller ID and other campaign parameters need to be set up by a Biz-Line representative when adding the service.