

Email & SMS Templates

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Summary

Every Email and SMS template stored within Patient Communicator is found by going to **Settings>Message Settings>Email & SMS Templates**.

You may make permanent changes to templates or create new templates from this location.

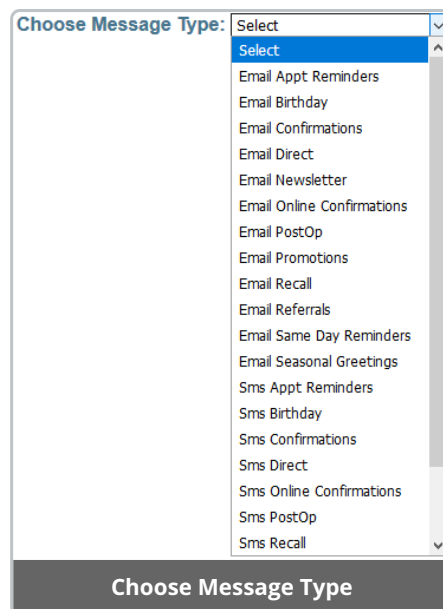
Remember that some file folders contain templates for specific notifications such as Confirmations, Reminders, Post Op, etc. Creating a new template to use in a notification must be done in the file folder for that notification.

Some templates are only found in **Communication Center** and are sorted into file folders by general subject for ease of access.

These include Direct, Promotions, Seasonal Greetings, etc.

View Templates

Click **Select** to view file folder where the templates are stored. The folders are sorted by type.



The image shows a dropdown menu titled "Choose Message Type:". The menu is open, displaying a list of options. The first option is "Select", which is highlighted in blue. Below it, there are 20 other options, each preceded by "Email" or "Sms". The options are: Email Appt Reminders, Email Birthday, Email Confirmations, Email Direct, Email Newsletter, Email Online Confirmations, Email PostOp, Email Promotions, Email Recall, Email Referrals, Email Same Day Reminders, Email Seasonal Greetings, Sms Appt Reminders, Sms Birthday, Sms Confirmations, Sms Direct, Sms Online Confirmations, Sms PostOp, and Sms Recall. At the bottom of the dropdown, there is a dark grey button with the text "Choose Message Type".

Choose Message Type:
Select
Email Appt Reminders
Email Birthday
Email Confirmations
Email Direct
Email Newsletter
Email Online Confirmations
Email PostOp
Email Promotions
Email Recall
Email Referrals
Email Same Day Reminders
Email Seasonal Greetings
Sms Appt Reminders
Sms Birthday
Sms Confirmations
Sms Direct
Sms Online Confirmations
Sms PostOp
Sms Recall

Choose Message Type

Once a *Message Type* file is chosen, click **--New--** to find an existing template or create a new template within that *Message Type* file. Select a template to load for editing.

Email Editing

When making a permanent edit to an existing template, Patient Communicator recommends creating a duplicate of the template allowing the original to be kept for future use.

After clicking **Duplicate**, you will see the word *Copy* in the *Template Name*.

Rename your template and enter an appropriate *Email Subject*.

Patient Communicator uses keywords within your templates. Keywords are recognized by the % before and after the keyword. When used, the keyword will be automatically filled when the message is sent. You may insert keywords from the editor found on the screen.

It is possible to edit the text content of any email message. Wording within the graphic content cannot be changed. Edits in the text content are made like any word processor with the assistance of the editor in the screen above.

SMS Editing

When making a permanent edit to an existing template, Patient Communicator recommends creating a Duplicate of the template allowing the original to be kept for future use.

After clicking **Duplicate**, you will see the word *Copy* in the Template Name.

Rename your template in the *Template Name* field.

Patient Communicator uses Keywords within your templates. Keywords are recognized by the % before and after the keyword. When used, the keyword will be automatically filled when the message is sent. You may insert keywords from the editor found on the screen. Just click **Insert Template Keyword**.

Template Name: Copy of Missed Appt

Insert Template Keyword

%PracticeName%-Dear %FirstName%, We're sorry we didn't get to see you at your appt. today. Please call our office at %PracticePhone% to reschedule.

Characters used: 147 Characters remaining: 13

Test SMS Address: Test SMS

Template Keywords

It is possible to edit the text content of any Sms message.

Note: All outbound Sms messages are limited to 160 character (includes spaces and punctuation).

There is a character counter at the bottom left of the window showing the current character count of your message.

This is approximate as the auto-fill creates an unknown amount of characters. If your message is close to 160 characters, send a test Sms to your cell phone. Just enter your cell phone number in the *Test SMS Address* field and click **Test SMS**. If your test message is delivered in full, you may save the message and use the template.

Any template used within a notification may be edited and tested directly within the *Edit Template* screen within the notification.

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