SMS Inbox

Last Modified on 11/07/2022 12:44 pm EST
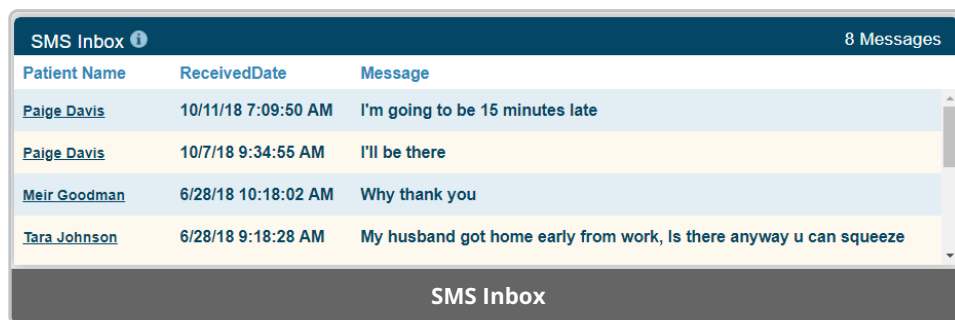
Summary

The SMS inbox is where you will come to review and reply to patient SMS messages to the practice. It's the second quadrant down on the Homepage.

If your patient replies to a text message, their message will be found here.

> **Note:** The only exception is a reply text to a confirmation request which will appear in the Appointment Confirmations inbox.

Patients having your text number may even initiate a text conversation on their own.

The *Home Page* view will only show the most recent 4 messages. You may preview any other messages by scrolling within the window. In the example above, you can see that the Inbox contains 8 messages. To open the inbox viewing pane, click anywhere on the Inbox.

The *SMS Inbox* popup window will appear. From this screen, you may view the message in its entirety, see the full message string of sms communications between your practice and the patient, opt patients out of messaging, and reply to your patient.

SMS Popup Window
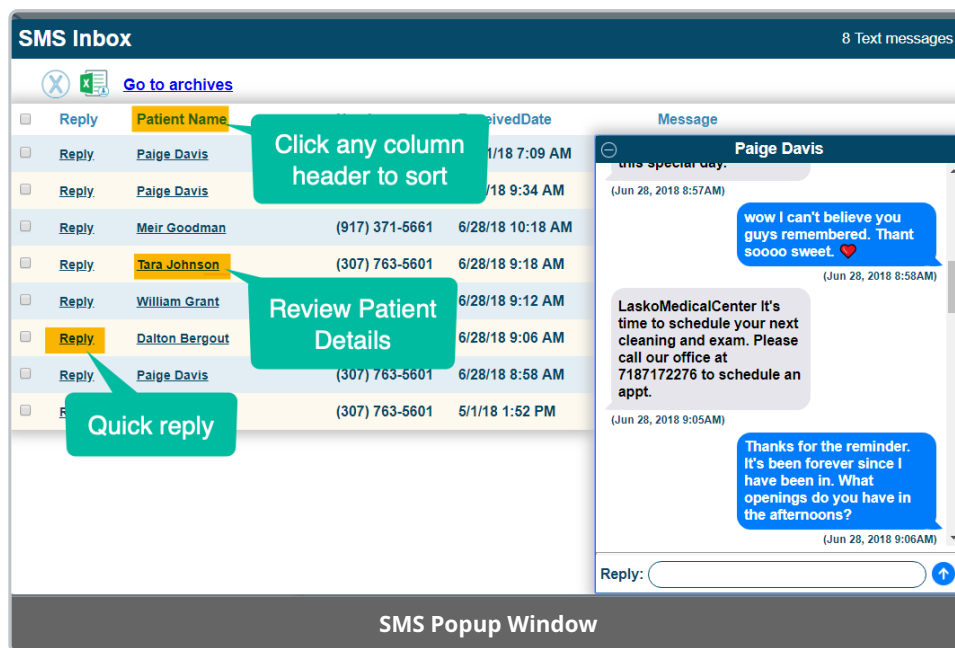
- **View Message:** Click on the bubble in the right hand column to open the message string. You may reply to patient in the Reply field and click the up arrow to send.

- **Sort by column:** Click the **column header**

- **Quick Reply:** Click the **Reply** link. Enter your reply in the *Send SMS to Patient* popup window, and click send.

- **Delete a thread:** Select the message checkbox in the left hand column and click the **Archive (X)** icon.

- **Review Patient Details:** Click on an underlined patient's name. The Patient Details window opens in a new tab. See Patient Details article for more details.

- **Save messages to Excel:** Click the **Excel icon**

It's always a good idea to keep your SMS Inbox clean. Once a message has been seen and any necessary action taken we recommend that you delete the message, helping others to know that any message remaining needs to be reviewed or acted upon.

Note: Messages are automatically removed and sent to Archives from the inbox after 30 days.