

# PrimaryClinic

## How To Create An SMS/Email Template

[www.primaryclinic.com.au](http://www.primaryclinic.com.au)  
[www.global-health.com](http://www.global-health.com)

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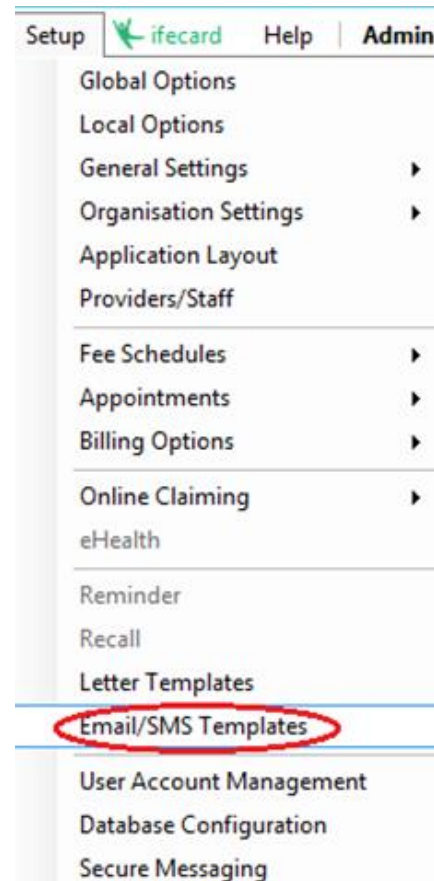
# How To Create An SMS/Email Template

When you need to send the same **Email or SMS** to a group of patients, you can save time by creating templates.

PrimaryClinic allows you to create as many templates as you need.

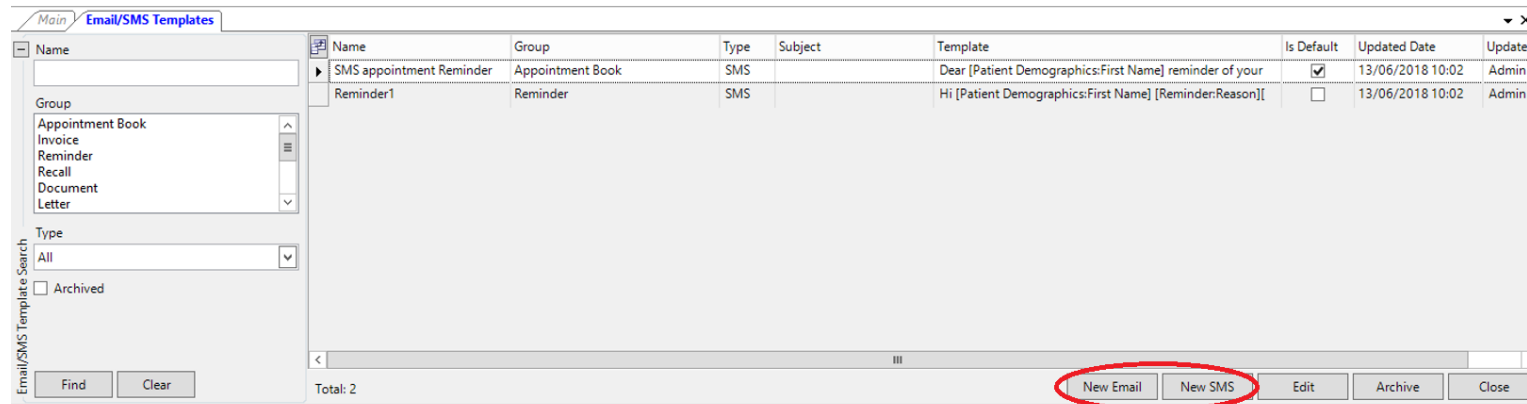
# How To Create An SMS/Email Template

Select **Setup** from the **Main Menu** and select **Email/SMS Templates**



# How To Create An SMS/Email Template

In the **Email/SMS Template** window, click on either **New Email** or New SMS at the bottom right-hand side of the screen to create a new template.



# How To Create An SMS/Email Template

Assign the **Name** and the **Group** of the template being created.

**Edit SMS Template**

Name:

Group:

Default Template

Template: Dear [Patient Demographics:First Name] reminder of your appointment on [Appointment:Date] at [Appointment:Time] with [Appointment:DoctorFullName] please reply Y to confirm or N to cancel

**Merge fields**

- Patient Demographics
- Doctor
- Recipient
- Copy To
- Letter
- Reminder
- Appointment
- Invoice
- Receipt
- Miscellaneous
- Business Address

Number of chars: 186, SMS message should be less than 160 chars

# How To Create An SMS/Email Template

When editing the template, you will find that you need to use the **patient information** to appear in your message. The **merge fields** on the right serves as placeholders (enclosed in brackets) which will be replaced with the patient's information when the email or SMS is created.

To see all the **available merge fields**, you can expand the sections by clicking on the “+” sign next to the title. Once you've found the field you want to add to your template, **drag the field and drop** it to the place in your template where you want the information to appear.

Tick the **Default Box** if you would like that template to be selected by **Default** when sending the SMS or Email

Select the **OK** button



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PLEASE NOTE: SMS reminders have a **limit of 160 characters per SMS**. If you exceed the 160 characters you will be charged accordingly. Under the Template box, it will show how many characters are remaining.

*The above steps are the same for creating an Email Template. (Email reminders do not have a character limit. You are free to use as many as you wish.)*

# Tutorials and FAQs

Read or watch more tutorials on the website.

<https://www.primaryclinic.com.au/tutorials/>

If you have a question or need some help please check the Frequently Asked Questions page before contacting the support team.

<https://www.primaryclinic.com.au/faqs/>

## **Support:**

You can reach support by lodging a ticket on our website:

[www.primaryclinic.com.au/support/](http://www.primaryclinic.com.au/support/)

Or email us at:

[primaryclinic@global-health.com](mailto:primaryclinic@global-health.com)

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