

Marketing Messages

Last Modified on 11/10/2024 3:40 pm AEDT

Send informational and promotional SMS messages to defined groups of patients. These messages will use SMS credits to send to each recipient.

This feature requires Zedmed v36.9 or later.

Sending a Marketing Messages SMS

Step 1 - selecting the recipients

Each time you send Marketing Messages, the recipients are defined using the Patient Demographics and Appointment Criteria options.

1. Select the **Marketing** button on Zedmed's **Reception** tab.

The **Marketing Messages** UI will open.

2. Define the recipient criteria for the SMS.

Patient Demographics:

- Patients with the status Current and Casual in their **Patient Records** are included. Archived patients are not included.

Whether you **Exclude Casual Patients** will depend on the criteria the practice uses for a patient's **Status**.

Casual is often used for patients who are not regular or make one-off appointments.

- The **Card** types use **Yes No** options to allow you to define requirements for one or more cards.

Appointment Criteria:

- Multiple selections can be made for Appointment Types and Branches.
 - A Branch selection must be made before doctors can be selected.
3. Select the **Screen** button to review the recipients.

This will open the report view so you can review the recipients.

The screenshot shows the 'Marketing Messages' interface with the following sections:

- Patient Demographics:** Includes checkboxes for 'Exclude Casual Patients', 'Age' (with 'From' and 'To' fields), 'Sex At Birth' (Male/Female), 'Has Veteran Card', 'Has Medicare Card', and 'Has Health Care Card'. It also features an 'ATSI' dropdown menu currently set to 'None Selected'.
- Appointment Criteria:** Includes a checked 'Filter by Appointments' box. Radio buttons are selected for 'Both Attended and Unattended'. It contains date pickers for 'Date from' and 'Date to' (both set to 10/05/2024), a 'Branches' dropdown (1 selected, 'Branch 1'), 'Appointment Types' dropdown (None selected), 'Doctors' dropdown (13 selected, 'Arthur, Lesley, Boykin, E'), and a 'Resources' dropdown (None selected).
- Report Columns:** A grid of checkboxes for 'Patient Full Name', 'Address', 'Sex at Birth', 'Age', 'Appointment Date/Time', 'Mobile Phone', 'Home Phone', and 'Work Phone'.

At the bottom, a status message reads: '1 of 1 message(s) queued for SMS... process completed.' Below this are buttons for 'Print', 'Screen', 'Export', 'View History', 'Send SMS', and 'Close'.

Step 2 - Sending the SMS

1. Select **Send SMS**.

The Send SMS dialog will open and show the message templates.

2. Select the message template to be used.

The content of the message will be displayed.

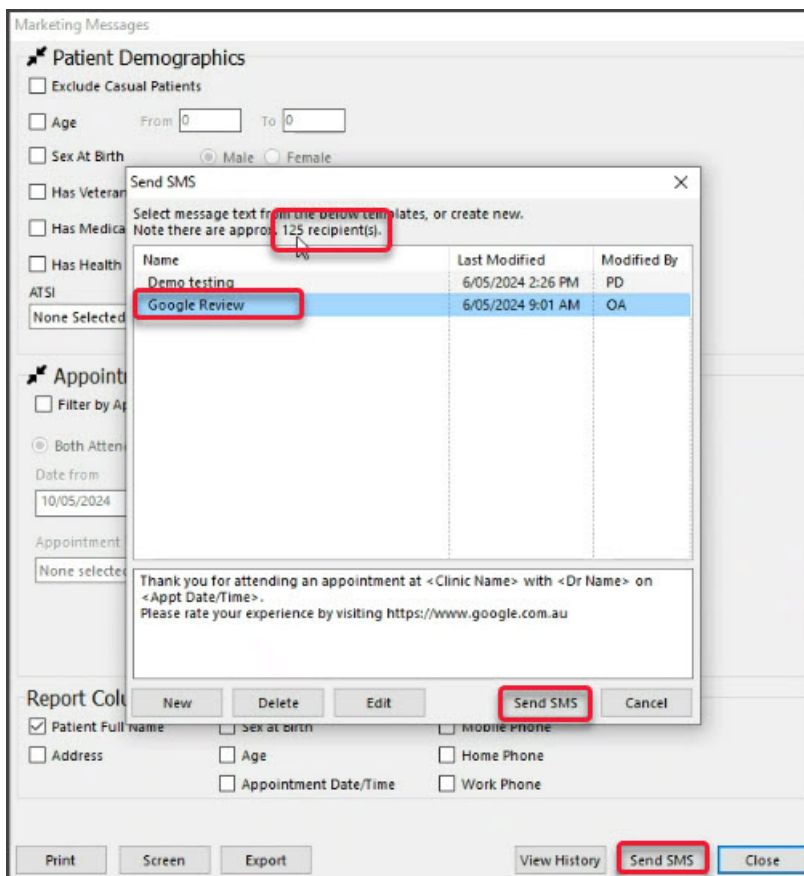
3. Review the number of recipients to avoid unexpectedly large SMS sends.

The example below shows 125 recipient(s).

4. Select **Send SMS**.

The messages will begin to send and display the progress at the bottom of the Marketing Messages screen.

Note: Pressing **Esc** will open a dialog allowing you to select **Yes** to 'Stop sending the remaining messages'.



Creating and editing templates

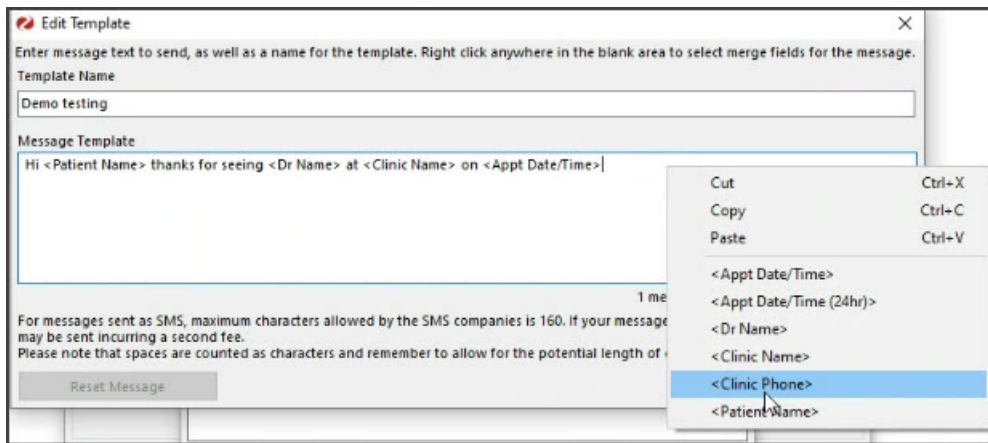
SMS messages are created as templates that can be used multiple times.

These steps can also be used to edit an existing template.

To create a Marketing Messages template:

1. Select the **Marketing** button on Zedmed's **Reception** tab.
The **Marketing Messages** UI will open.
2. Select **Send SMS**.
3. Select **New** (or **Edit**).
4. Add the template name.
5. Add and delete the message text as required.
6. Right-click anywhere in the blank area, and the available merge fields will appear.
7. Select a merge field to enter it into the message text.
8. Review the character count to see if the SMS will require more than one message to send.
9. Select **Close** to save the changes.

Note: If you accidentally delete a template, contact Zedmed Support to see if it can be recovered.



Viewing the message history

There are times when it can be useful to review the Marketing Messages history. For example, to review the criteria used, to the query number of messages sent, to view the text used and to see who sent the messages.

To view the **Marketing Messages** history:

1. Select the **Marketing** button on Zedmed's **Reception** tab.

The **Marketing Messages** UI will open.

2. Select the **View History** button.

The **View History** screen will open.

There is a line for each SMS sent with the date and number of messages sent.

3. Expand a specific SMS send to view the criteria used.

Marketing Messages

Patient Demographics

Exclude Casual Patients

Age From To

Sex At Birth Male Female

Has Veteran Card Yes No

View History X

Template Used	Sent On	Sent	Staff
<ul style="list-style-type: none"> ▼ Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r... <li style="padding-left: 20px;">All current and casual patients <li style="padding-left: 20px;">Appointments attended and unattended, from 10/05/2024 to 10/05/2024 11:59:59 PM <li style="padding-left: 20px;">Branch 1 <li style="padding-left: 20px;">Lesley Arthur, Ethel Boykin, Phillip Davis, Augustus Eason, DANUTA FERNANDEZ, Igor Fuller, WARREN HEDRIC... 	10/05/2024 1:51:44 PM	1	Phillip Davis
> Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...	6/05/2024 2:28:18 PM	20	Phillip Davis
> Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...	6/05/2024 2:27:16 PM	2	Phillip Davis
> Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...	2/05/2024 3:45:12 PM	70	Office Admin
> Hi <Patient Name> thanks for attending your appt with <Dr Name> at <Clinic Name> on <Appt Date/Time>...	2/05/2024 2:51:57 PM	2	Office Admin
> Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...	2/05/2024 2:49:47 PM	2	Office Admin

[Close](#)

Report Columns

Patient Full Name Sex at Birth Mobile Phone

Address Age Home Phone

Appointment Date/Time Work Phone