

Office SMS templates

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Practices can create predefined SMS templates to quickly send common messages to patients.

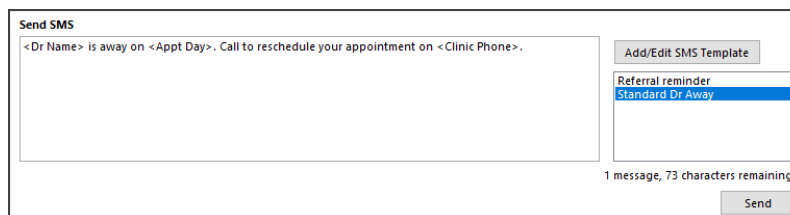
Requires ZedSMS and Zedmed v39 or later.

To send a predefined (template) SMS

From a Patient record:

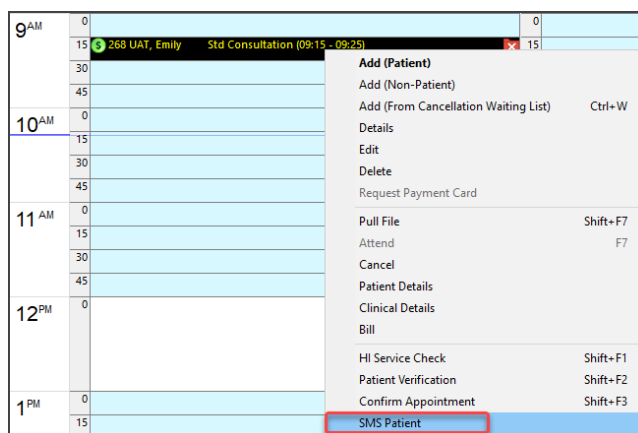
1. Open the Patient Record and select the **Messages** tab.
2. Select the template.
3. Select **Send**.

Use the **Add/Edit SMS Template** button to add or edit a template.



From the Appointment Grid:

1. Right-click a patient booking.
2. Select **SMS Patient**.
3. Opens the **Message** tab.
4. Select the template.
5. Select **Send**.



To create an SMS template

You can add and edit SMS templates in the Messages Tab, as shown above, or in the SMS configuration screen.

These templates can be used and updated by anyone at the practice.

1. Select **Practice Setup > SMS configuration** to open this screen.
2. Select the **Patient Templates** tab.
3. Select **Add Message**.
4. Enter a **Template Name**.
5. Enter the **Message Text** and add any merge fields.
6. Select **Close** to save and exit.

The screenshot displays the 'SMS Configuration' application window. On the left, a sidebar lists various configuration options, with 'Patient Templates' currently selected. The main area is divided into a 'Message Templates' list on the left and a 'Message Text' editor on the right. The 'Message Templates' list shows 'Referral reminder' as the selected template. The 'Message Text' editor contains the text 'Hello, please remember to bring your referral'. A 'New Patient Template' dialog box is overlaid on the main window, featuring a 'Template Name' input field and 'OK' and 'Cancel' buttons. At the bottom of the main window, there are buttons for 'Add Message', 'Delete Message', 'Close', and 'Cancel'. A character count at the bottom right indicates '1 message, 115 characters remaining'. A warning note at the bottom states: 'Messages longer than 160 characters may incur additional charges from your SMS provider (typically once per additional message). Note that this size will include the full value of any merge fields (the count above is an estimate based on the maximum value for each merge field)'.