

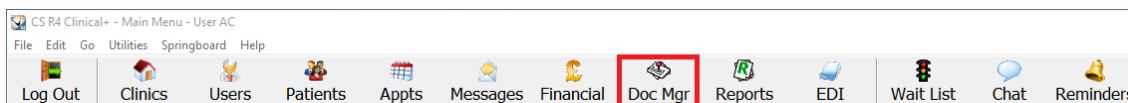
CS R4+

How to Create a Recall SMS Template

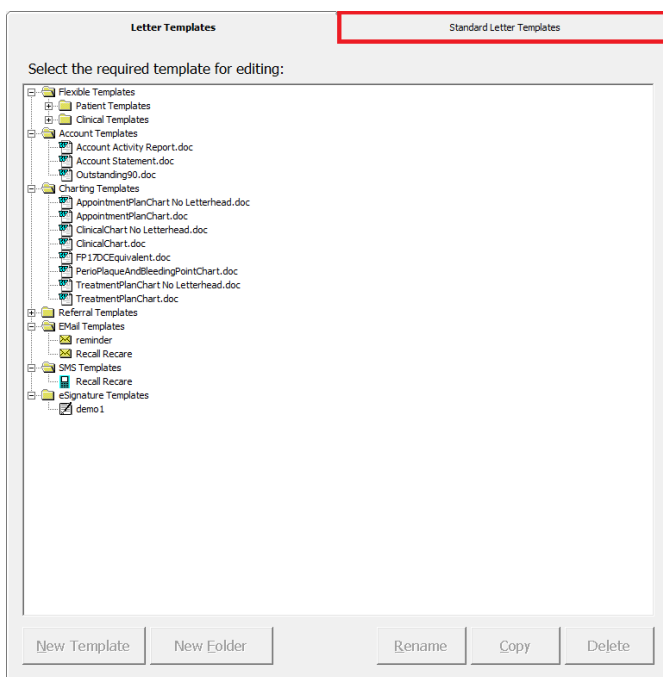
This handout is intended for all users and provides the instructions for creating a recall SMS template in the CS R4+practice management software.

To create a recall SMS template:

- 1 On the **Main Menu**, click **Doc Mgr**. The **Letter Template Administration** window is displayed.



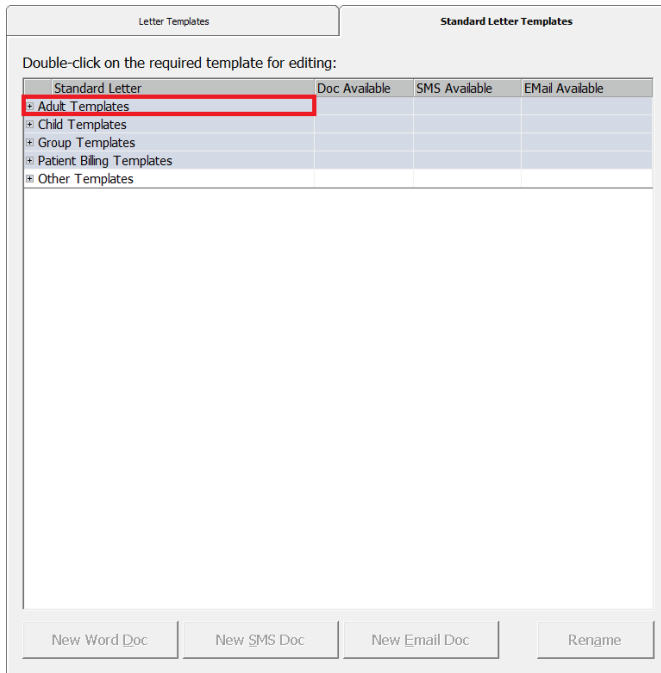
- 2 Click **Standard Templates**.



Handout



3 Click **+** to the left of **Adult Templates** to display the list of templates.



Letter Templates

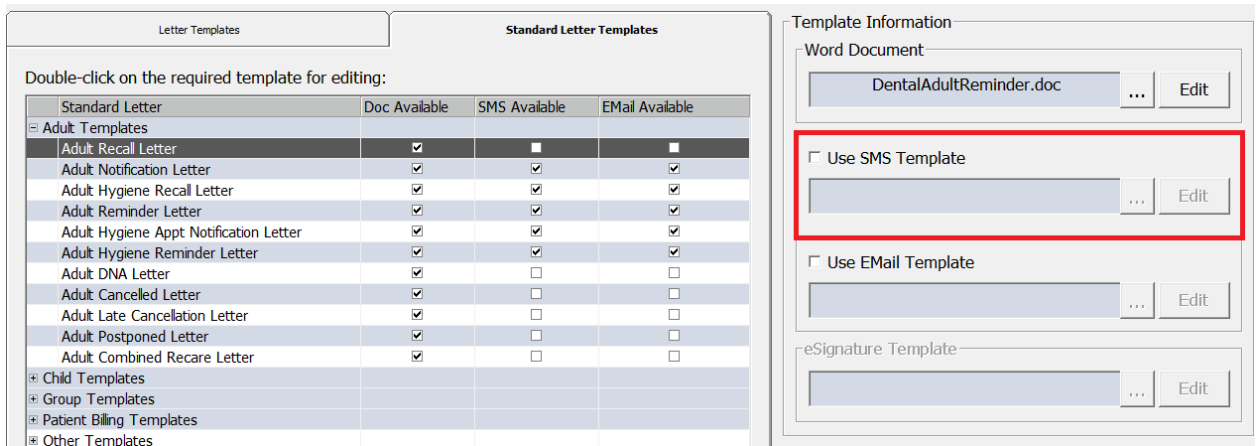
Standard Letter Templates

Double-click on the required template for editing:

Standard Letter	Doc Available	SMS Available	E-Mail Available
Adult Templates			
Child Templates			
Group Templates			
Patient Billing Templates			
Other Templates			

New Word Doc New SMS Doc New Email Doc Rename

4 Select **Adult Recall Letter** and click **Use SMS Template**.



Letter Templates

Standard Letter Templates

Double-click on the required template for editing:

Standard Letter	Doc Available	SMS Available	E-Mail Available
Adult Templates			
Adult Recall Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Notification Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Hygiene Recall Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Reminder Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Hygiene Appt Notification Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Hygiene Reminder Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adult DNA Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Cancelled Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Late Cancellation Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Postponed Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Combined Recare Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child Templates			
Group Templates			
Patient Billing Templates			
Other Templates			

Template Information

Word Document

DentalAdultReminder.doc ... Edit

Use SMS Template

... Edit

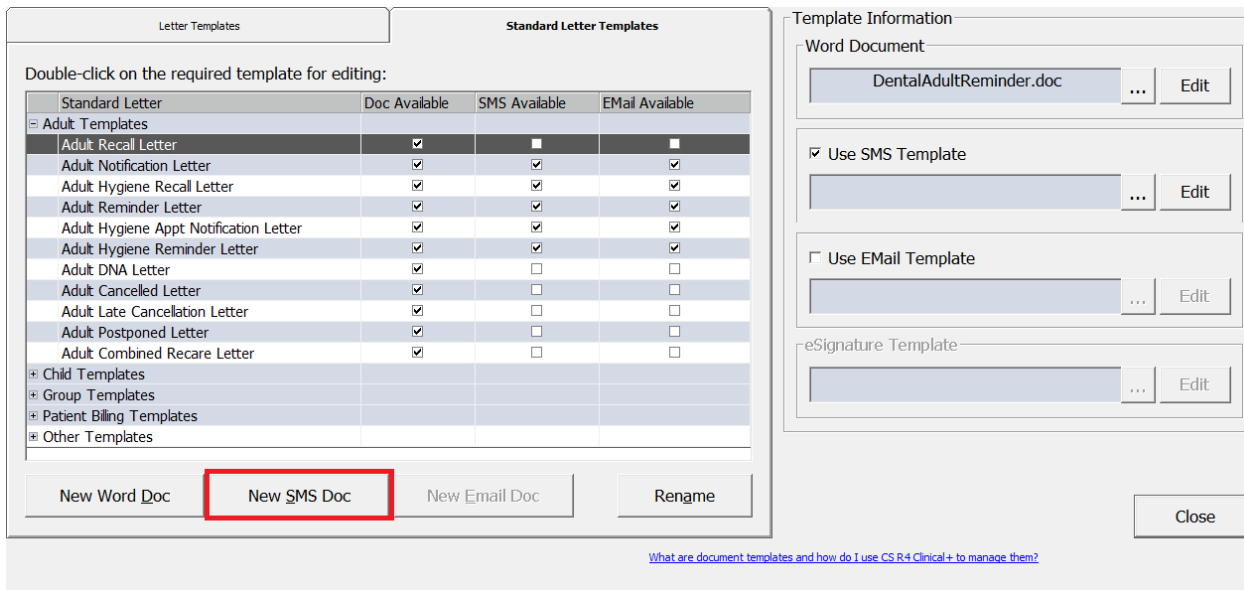
Use EMail Template

... Edit

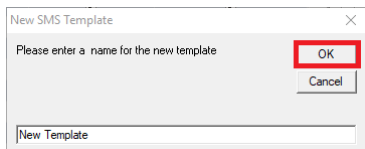
eSignature Template

... Edit

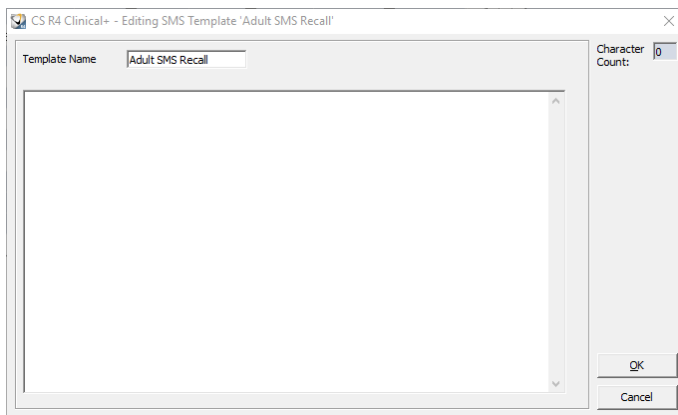
5 Click **New SMS Template**. The **New SMS Template** window is displayed.



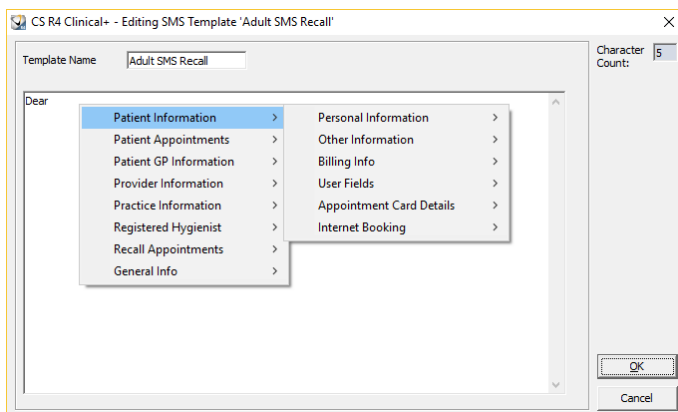
6 Enter a name for the new template and click **OK**. The **Editing SMS Template** window is displayed.



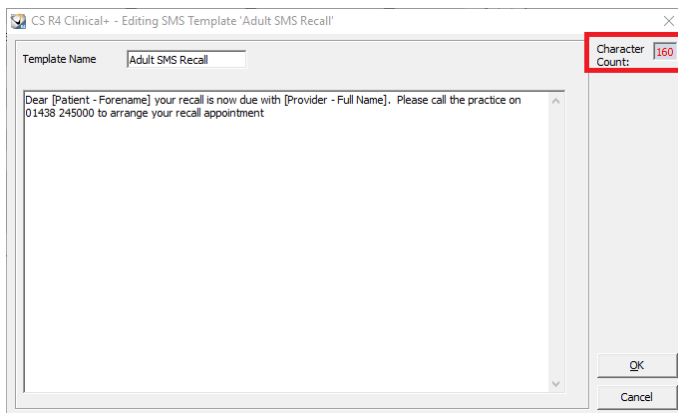
7 Compose your message.



8 To insert a merge field right-click in your message.

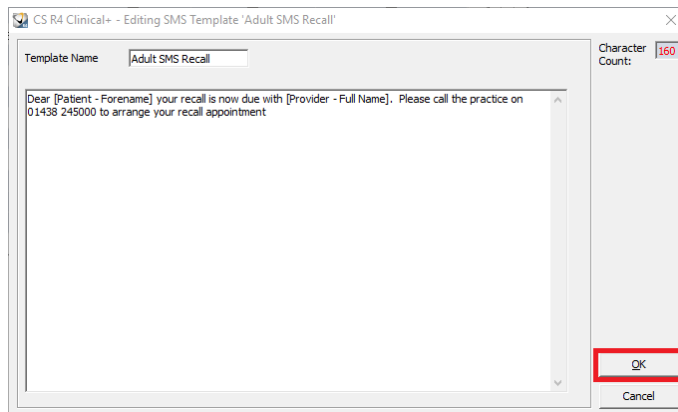


9 The character count box in the top left-hand corner will show how many characters have been used in your message.

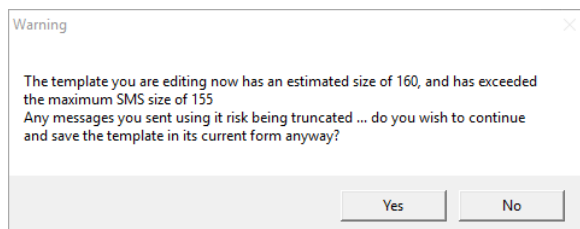


Note: Consider what data will replace the merge fields as it may contain more characters than the name of the merge field

10 Click **OK** to save the template.



11 If the character count exceeds the SMS limit of 155 then the **Warning** window is displayed.



12 Click **No** to edit the message or click **Yes** to save the template.



Note: Depending upon your message provider messages over 155 characters will either be truncated or sent out as multiple messages