

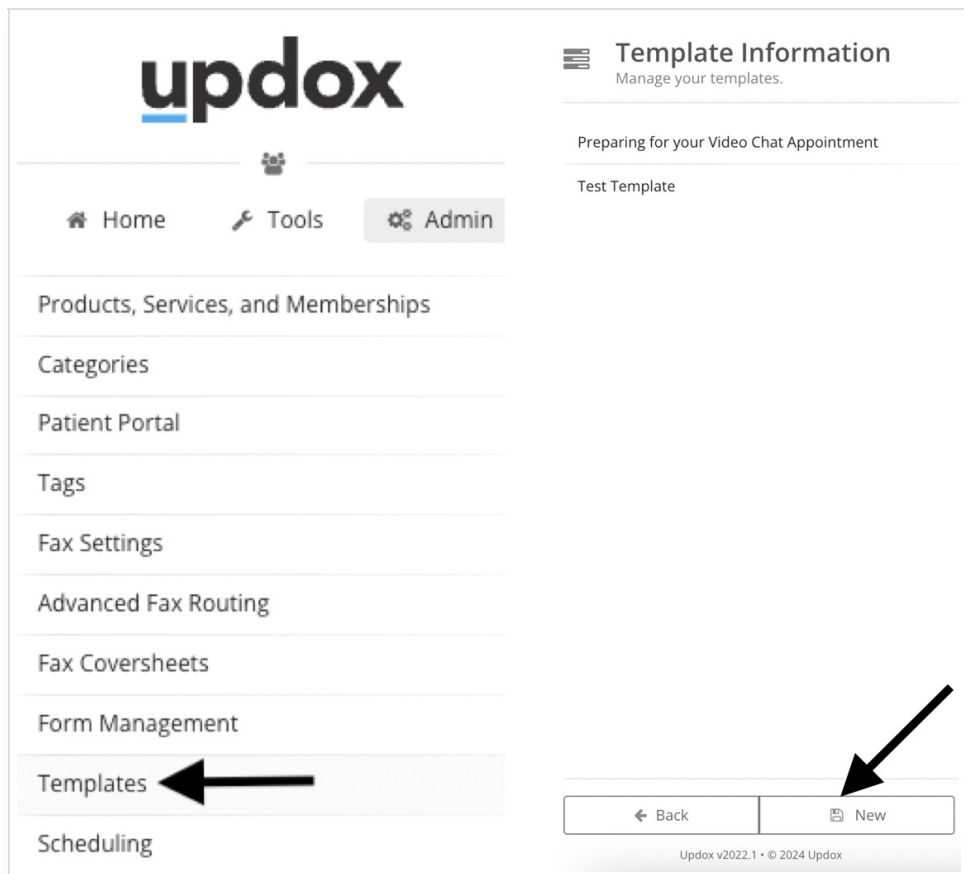
Templates -- User Guide



Last Modified on 02/08/2024 10:13 am EST

Templates are a great way to streamline common text and fax responses and standardize messaging for user efficiency.

After logging into your Updox account, choose **Menu > Admin > Templates**. Click **New** at the bottom of the panel to start a new template.



Title your template and create the written content. When you are ready for your users to access this template, ensure **Active** is checked, and click **Save**.

Edit Template

Update your template.

Title

Preparing for you Video Chat Appointment

Active

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Please review this guide before your scheduled video visit.
<https://help.updox.com/help/video-chat-participant-guide>

This template is available for use in SMS and Secure Text messages, since it is less than 140 characters (currently at 120 characters).

Templates can be used when sending a text or a fax. Users can choose from the template dropdown for efficient responses.

Send a Text Message ✕

I want to send a Secure Text SMS Text What's the difference?

Send to *

Patients registrars must have a date of birth and either a cell phone or an email saved in the Address Book. Contact registrars must have first and last name and either a cell phone or an email saved in the Address Book.

Notify method * SMS Email What's the difference?

Assign to a queue Auto-sort incoming messages and responses with workflow queues. [Learn More](#)

Greeting You have a secure message waiting for you from Family Medical Associates. Please follow the link to login.

Template

Form

Attachments

Secure message *

Allow responses

Discard Send Secure Text

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⚠ SMS text messaging is not a HIPAA-compliant method of communication. Refrain from entering any PHI in the message contents.

Template

Form

Message *

Discard Send SMS Text

Sending Provider

Fax Coversheet

Address To Individual Business Both

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Message

Preparing for your Video Chat Appointment

Text Template