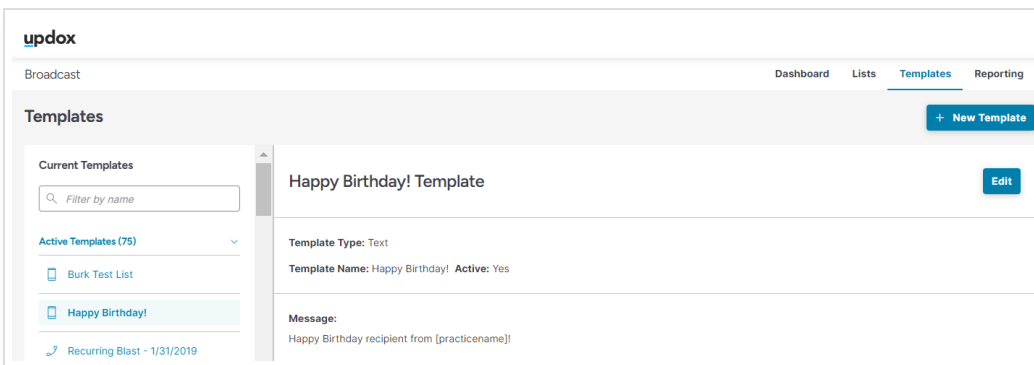# How To: Create a Broadcast Template

Last Modified on 01/29/2025 3:35 pm EST

Creating a Broadcast Template

Broadcast Templates provide preset text that can be used to speed up the process of creating common broadcast messages.

From **Menu > Home**, click **Broadcast** and then select the **Templates** tab.

If you have existing templates, they will be listed along the left side of the page. Click on one to review it's contents.

If you are an admin, you can create new templates by clicking the **+ New Template** button in the top right corner.

Choose a communication method for your template.

Give it a name, a subject line (Email and Portal only), and type the body of the message in the Message field. You can personalize it by using variables, like your practice's name or phone number.

Ensure the **Active** checkbox is checked when you are ready for it to be used, then click **Save**.

New Template

Cancel **Save**

| ☐ Text Message | ✉ Email | ☎ Telephone Call | ☐ Portal Message |

Template Name *

Happy Birthday!

☑ Active

Subject *

Happy Birthday!

Message *

↶ ↷   **B** *I* <u>U</u> S̶

Happy Birthday [firstname] from [practicename]!

ⓘ **Personalize your message**

Use variables below to personalize your content. Variables will always appear in English.

- **[fullname]**
  The recipient's first and last name
- **[firstname]**
  The recipient's first name
- **[lastname]**
  The recipient's last name
- **[practicename]**
  The practice name
- **[practicephone]**
  The practice phone number

Tip: Templates that are **Active** will be available under **Templates** when sending a message.

Respect patients' communication method * ⓘ

No ▾

☐ Filter by Appointment

Send to *

Select an option ▾

Set to repeat

No ▾

Messages sent using this broadcast feature will be sent to patients with a phone number in the Address Book.

Message *   Templates ▲

Happy Birthday
Flu Shot