

# How To: Create a Broadcast Template



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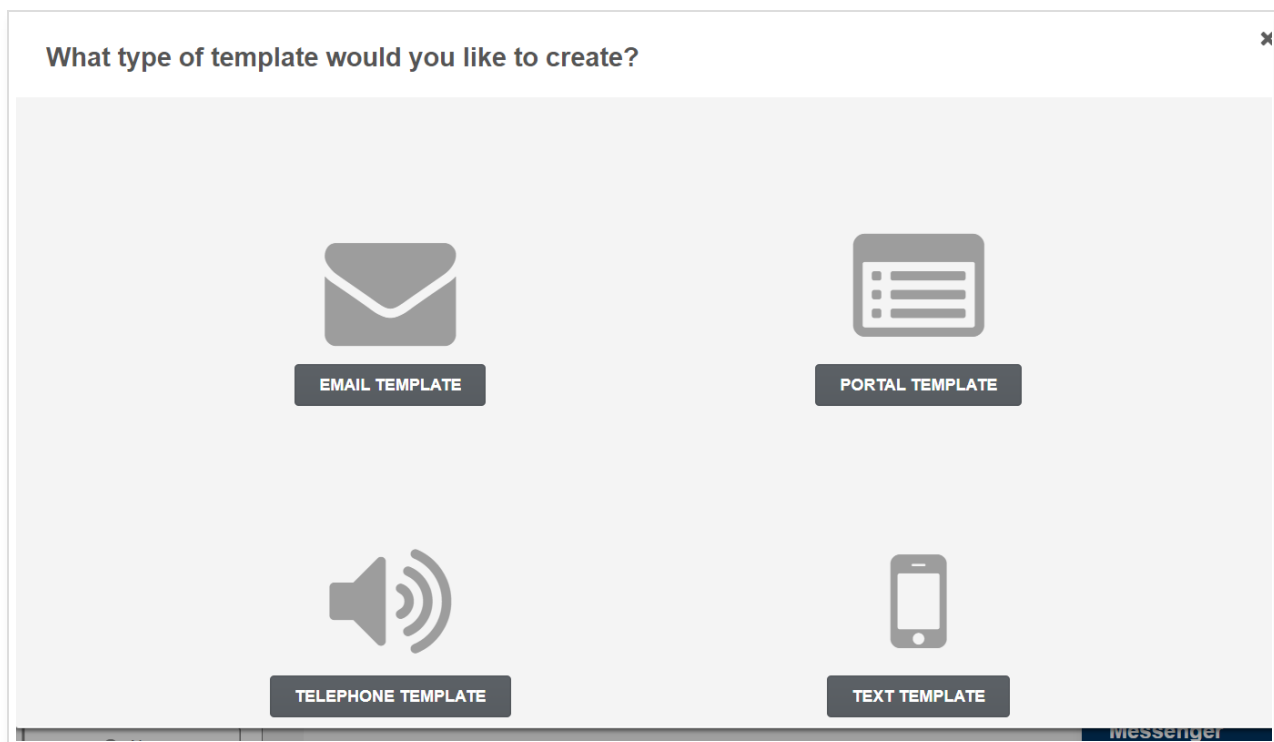
Broadcast templates are messaging templates with pre-set text to make sending common messages quickly within Updox.

## Step 1:

From within Updox, click **Menu - Admin - Broadcast Configuration**. You must be an Updox Admin to access this option. Click on Templates, then 'New'.

## Step 2:

Choose which message delivery that you'd like to create a messaging template. For this example, we will choose 'Email'.



## Step 3:

Name the message template, provide a Subject, and type the message body in the Message field. Ensure 'Active' is checked when you are ready for it to be used, and click 'Save'.

Template Name

Vaccine Information

Active

Subject

Important information regarding your vaccine.

Message

B I S U ↺ ↻

Hi [fullname],

As we prepare for offer vaccinations, please fill out the following form to provide your information:

<https://forms.myupdox.com/form/55083>

Thanks,  
[practicename]

**Use variables to personalize the message.**

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

CANCEL

SAVE

#### Step 4:

Using variables will pre-populate your text with the information that is in Updox. For example, if your practice name is 'Updox Family Practice', the above example would end with:

Best,

Updox Family Practice

Variables are a great way to personalize the message for your patients and your practice.

**Use variables to personalize the message.**

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

**Tip #1:** Templates that are 'Active' will be available under 'Message Template' when sending a Broadcast.

Respect patients' communication method <sup>?</sup> Send To

No -- None Selected --

Subject

Subject

Filter by Appointment

Message

B I S U ↺ ↻

Message Template

Message Template

New Patient

Vaccine Information

Use variables to personalize the message.

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

Set to Repeat

No

← Back to delivery options

CLOSE SEND ✓

**Tip #2:** Text Broadcast templates must be under 140 carriers to comply with carrier rules. Preview is available on both text and phone templates.

Template Name Vaccine information  Active

Message 137/140 characters

If you'd like to be notified when the vaccine is available for your age bracket, fill out this form:  
<https://forms.myupdox.com/form/55085>

PREVIEW TEXT

Use variables to personalize the message.

- [firstname]  
The patient's first name
- [practicename]  
The practice name
- [practicephone]  
The practice phone number