

# Email Configuration 1 - Create Message Types and Templates

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Message Types allow you to create different types of Emails for different situations. Templates can then be associated with a Message Type, it is a multi- step process:

- Step A: Create a Message Type
- Step B: Create Templates for the Message Type
- Step C: Attachments
- Step D: Setting the Default Template to use
- Step E: Enable the Message Type

For example, you may create:

- An Email Message Type for surgery appointment reminders, called "Surgery Appointment Reminder - Email"
- Associated with this Message Type, you may have two Templates:
  - A: *Surgery - Type A Email Reminder*- an email with fasting instructions for Surgery A
  - B: *Surgery - Type B Email Reminder*- an email with fasting instructions for Surgery B

The steps below will take you through creating a Message Type and associated templates.

## Step A: Create a Message Type

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. Select **New** button.
5. Fill in the fields below.
6. Click **Create Message Type**.

Field	Description	Examples
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Category	<p>Choose to either create a:</p> <ul style="list-style-type: none"> <li>· Patient Email Message : This is a message type that does not relate to an appointment and is for the patient. Messages of these types can be triggered to send on some system event, or they can be sent via the Patient Correspondence &gt; New Email screen.</li> <li>· Appointment Email Message: This is a message that relates to an appointment. This could be triggered to send on the creation of an appointment, or as a reminder a set period before the appointment occurs.</li> </ul>	
Code	A unique name for the Message Type	<p>Patient Email Messages:</p> <ul style="list-style-type: none"> <li>·New patient Email</li> <li>·Patient has not returned admission pack</li> </ul> <p>Appointment Email Messages:</p> <ul style="list-style-type: none"> <li>·New Appointment - Surgery</li> <li>·Appointment Reminder</li> </ul>
Description	A general description for the Message Type	<p>New patient Email:</p> <p>"New patient Email message welcoming them to the company"</p>

### Step B: Create Templates for the Message Type

Once the Message Type has been created, you need to create one or more Email templates that can be sent out to patients.

- Template are sets of commonly used blocks of text that are used in an email to a patient.
- Templates are version controlled - the latest version will always be used by default.
- Templates have to be Approved before they become live.

To add a Template:

1. Click **Administration**.

2. Click **Correspondence**
3. Click **Message Types**.
4. For the Message Type you just created, click **Templates**.
5. Click **New**.
6. Fill in the fields based on the table below.
7. Click **Create Correspondence Template**.
8. Click **Approve** - this will make it live - without approving the new version of the message will not be used.
9. To Add an attachment refer to Step C below

Field	Description	Example
Code	Code for the template	see below
Description	Description of the SMS template	see below
Subject	Subject of the email.  It can include substitution variables	see below
Body	SMS Message text, which can include substitution variables for patient first name, patient last name, appointment time, etc.  HTML/CSS Formatting is supported.  True Plain Text is not supported*.	see below
iCal	<b><i>Only available for Appointment Reminder Emails (Message Type Category)</i></b>  Tick to attach a iCalendar Invite to the email message. This will send a standard Calendar invite with the email, allowing the patient to add it to their Outlook, Gmail, or any standard calendar software.	True

### Step C: Attachments *(This is only for Appointment Email Type)*

You can add as many attachments to the email template as you like. To add an attachment to an email template:

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. **Find the Appointment Email Type** and click **Templates**.
5. Click **Show** and **Edit**.

6. Fill in the fields such as Code, Description, and Subject
7. In the Email Template, enter the text and website link in Body (Patient can access the link shared through email. You can use a limited number of HTML tags to format some text-based description fields.
8. Click **Update**.

**Correspondence templates**

Dashboard / Administration / Correspondence / 03Email Appointment email 03 Appointment Email

See the available Documentation.

**Code \*** test SPP

**Description \*** test SPP

**Subject \*** don use this

**Body** hi there,  
Please click below for further details.  
<a href="https://www.careright.au/">CareRight</a>

☐ Send meeting invite (iCal attachment)

#### Step D: Setting the Default Template to use

After adding the Template, you must set the default template for the Message Type. If this is not done, then the Email will not appear in the list of available Email messages to send to a patient.

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. Find the Message Type you just created, click **Edit**.
5. Select the Template you just added from the list under Default Template.

#### Step E: Enable the Message Type

Once you have set the default Template, you need to Enable the Message Type. This will make it appear for users to select as a Message Type.

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. For the Message Type you just created and click **Enable**.

#### Example Email Template

Example body and scripting:

A: *Surgery Type A- Email Reminder* - an email with appointment information for Surgery A, iCal invite and attachments: 1) directions, fasting info, admission pack

Code	Description	Body	iCals	Attachment
EMAIL-REMINDER-SURG-A	Email Appointment Reminder - Surgery A	Dear,      This confirms your appointment on    .      Please Fast 12 hours before your appointment.      Attached are the directions to the clinic.      Also attached is an admission pack. Please print and fill this out before you arrive at the Clinic.      Please call 08 8203 0550 if you have any questions.      Many thanks      Clintel Clinic	Yes	directions.pdf  fasting_info.pdf  admission_pack.pdf

Substitution variables can be used in the body of the message - see below for more details. More information on using the drag and drop script builder is below.

### HTML Formatting

- The body of the message supports full HTML/CSS styling.
- If you want to write an unformatted message, the only HTML you need to include is the break tag <br />.
- The break tag will create a new line in the email.
- If you do not include the break tag, then your emails will bunch and display on one line, without any line breaks.

## Updating a Template

If you wish to update an email message template:

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. Find the Message Type you just created and click **Templates**.
5. Click **Edit**.
6. Make any changes.
7. Click **Update Template**.
8. Click **Approve** - this will make it live - without approving the new version of the message will not be used.

## Removing an Attachment

To ensure versioning is maintained, it is not possible to delete an email attachment once it is used to a Template. You will need to create a new Template, attach any new attachments to this template, and make it the default template:

1. Click **Administration**.
2. Click **Correspondence**
3. Click **Message Types**.
4. Find the Message Type and click **Templates**.
5. Click **New**.
6. Fill in the fields as per above.
7. Click **Create**.
8. For the Message Type you are working with click **Templates**.
9. Find the new template that you just created and click **Show** and Scroll down to Attachments.
10. Click **New** and upload any attachments.
11. For the template you just created click **Approve**.
12. Edit on the Message Type you are working with.
13. Change the default template to the Template you just created.
14. Click Update.

## Substitution Variables

When setting up a template, you can use Substitution variables to insert fields from the patient record. Substitution variables are denoted by double curly brackets:

Instructions on how to use **Liquid** can be found here: <https://github.com/Shopify/liquid/wiki/Liquid-for-Designers>

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