

Email Configuration 1: Create Message Types and Templates

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System allows you to create the appointment email message type from administration - > correspondence menu. After creating the message type in the system, you will need to add a message template for the newly created message type.

- Step 1: Create a Message Type
- Step 2: Create Templates for the Message Type
- Step 3: Setting the Default Template to use
- Step 4: Enable the Message Type

Step 1: Create a Message Type:

To create a Message Type:

1. Click **Administration**.
2. Select **Correspondence** from the menu.
3. Select **Message Types**.
 - a. The Message Types screen will display.
4. Select the **New** button at the top of the screen.
5. Complete fields using the table below as a reference.
6. Click **Create Message Type**.

Field	Description	Examples
Category	Choose to either create: 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 > New Email screen. Appointment Email Message: This message relates to an appointment and can be triggered to send upon the creation of the appointment (or a specified minutes of time after creation). It can also be sent as a reminder a set period before the appointment occurs.	Patient Email Message Appointment Email Message
Code	A unique name for the Message Type	e.g. Appointment reminder email
Description	A general description for the Message Type	e. g: Appointment reminder

Step 2: Create Templates for the Message Type

Once the Message Type has been created, you need to create email template that can be sent out to patients.

- Template are sets of commonly used blocks of text that is used in a Email message 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. From **Administration**,
2. select **Correspondence** from the menu.
3. Select **Message Types** sub-menu item, the Message Types screen will display.
4. For the Message Type you just created, select **Templates** button.
5. Select **New** button.
6. Complete fields using the table below as a reference.
7. Select **Create Correspondence Template** button.
8. This will return you to the main screen, select **Approve** button to activate the changes.

Field	Description	Example
Code	Code for the template	example: Consultation email reminder
Description	Description of the Email template	example: Appointment Reminder - Consultation
Subject	Email Subject	example: Appointment reminder email

Body	Email Message text, User can use the substitution variables in the email body to populate a certain information from the system. such as: -patient first name, -patient last name, -appointment time, - appointment locationetc.	example: Hi, Your appointment is booked for on at., Regards,
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Step 3: 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. Select **Correspondence** from the menu.
3. Select **Message Types**.
 - a. The Message Types screen will display.
4. For the Message Type you just created, select **Edit** button.
 - a. The Edit Message type screen will display.
5. in the field **Default Template**, using the drop down, select the Template you just added from the list.

Step 4: 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. Select **Correspondence** from the menu.
3. Select **Message Types**.
 - a. The Message Types screen will display.
4. For the Message Type you just created, select the **Enable** button.
 - a. The Message Type is now enabled and ready for use.

Updating a Template

If you wish to update a Email message template that is being sent to patients:

1. Click **Administration**.
2. Select **Correspondence** from the menu.
3. Click **Message Types**.

4. For the Message Type you just created, click **Templates**.
 5. Click **Edit**.
 6. Make any changes.
 7. Click **Update Correspondence Template**.
 8. Click **Approve** - this will make it live - Without approving the new version of the message will not be used.
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