


# PatientXpress

## Templates

## 1. Creating Templates

### 6.3 Create a Custom Template

- Click on PatientXpress (PX) button and navigate to the [Setup](#) tab.
- In the [Custom Template](#) column, there are fields for Select Type, Enter Template, Enter Subject, and Enter Message.
  - **Select Type:** This drop-down menu has options for SMS, email, IVR, auto, and notes. You must select the type of template you'd like to create or modify.
  - **Enter Template:** This is where the name of the template can be saved, and existing templates can also be seen here.
  - **Enter Subject:** This field is only available when creating an email template, as emails require subject lines.
  - **Enter Message (SMS):** When creating SMS templates, you can directly type in your message using the variables on the right-hand side of the [Enter Template](#) section.
  - **Enter Message (Email):** When creating email templates, this field is transformed into the [Edit Template](#) button. A new window will appear in which the email template can be edited.
- Once the template is complete, the [Save](#) button can then be clicked to save the template. Now this template is ready to be used.

 PatientXpress Plugin

Using ConvergedComm Version 1.9.6.0

Birthdays Appointment Confirmation Feedback Contact **Setup** Beta

Profile

Enter Name:

Note: This name will be used as from name during email communication.

Scheduler

Click Scheduler button to manage scheduler details.

Custom Template

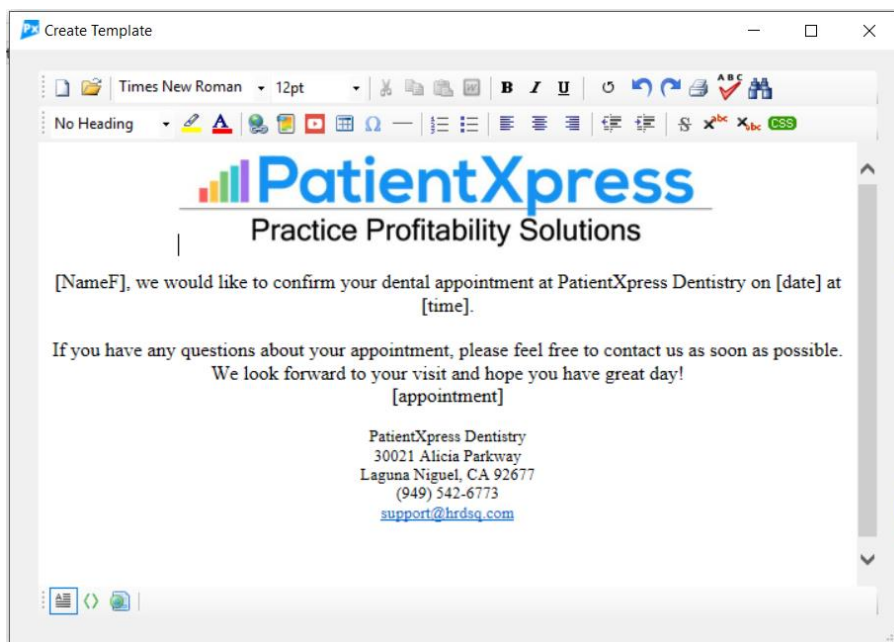
Select Type \*  Enter Template \*

Enter Subject \*  Enter Message \*

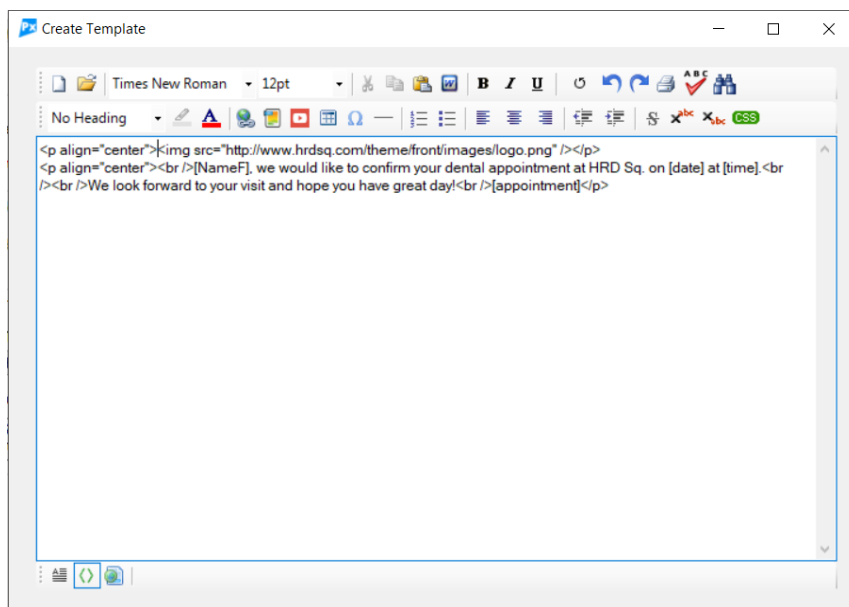
Note : These variables can be used [FName], [date], [time], [DueDate], [Feedback] and [Appointment] from existing

#### 6.4 Edit an Email Template

- After clicking the Edit Template button, an editor window will appear
- This editor is like a word processor and has the associated menus expected of one.
- At the bottom left corner, there is an icon with an 'A'. When the mouse hovers over it, it is revealed to be the **Design Mode**. This mode is where normal text and images can be typed and pasted in.



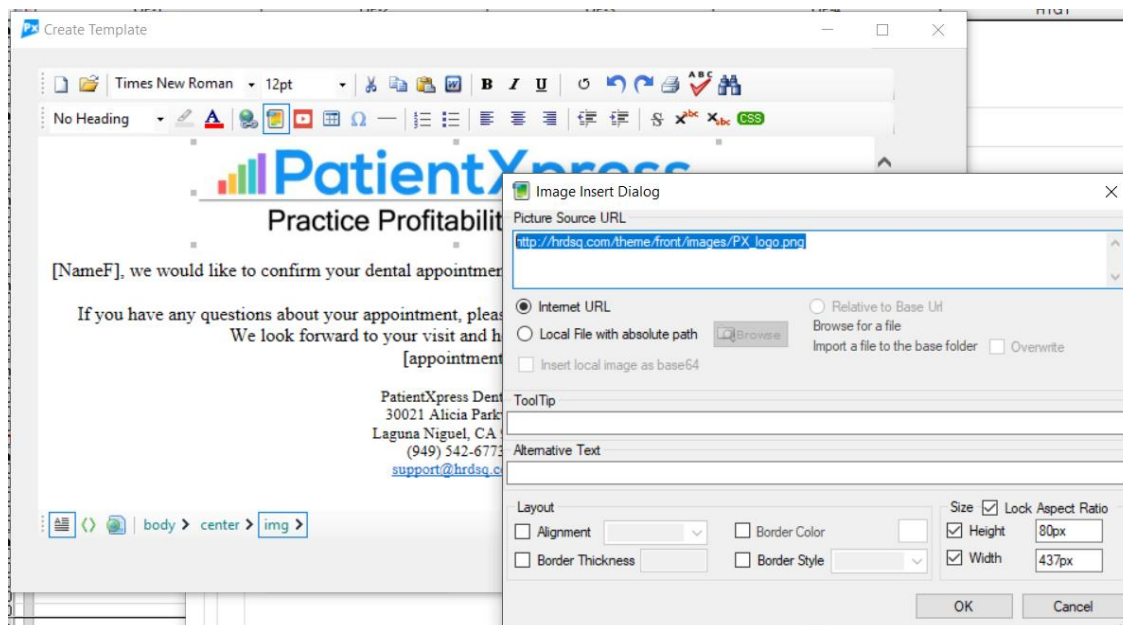
- The middle icon '<>' is the HTML Edit Mode. This mode permits the usage of HTML code for more powerful and visually appealing emails.



- The rightmost icon with a globe on paper is the Preview Mode. This mode allows you to preview the elements of any HTML code utilized.

## 6.4 Adding an Image to your Template

- Click on the **Image** button to launch the **Image Insert Dialog** window.
- We must select the option for **Internet URL** to include images.
- In the **Picture Source URL** field, we can paste the image URL and click **OK** when done.



- Once work within the editor is complete, it is time to save. You will notice that there is no save button available. To save, you may simply exit out by closing the window, and all the work will be automatically saved.
- Now that the template is complete, the **Save** button can then be clicked to save the template.
- For a video demonstration, please view our video on [Creating an HTML Email Template](#).