



Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

OP Notify: Edit a Template

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Version 14.10

📖 This article is part of the **OP Notify Training Program**.

Overview

After an Email template is created, OP Notify provides the ability to edit the template. A template can be updated and saved with OP Notify in order keep your templates up to date. This article is intended to explain how to edit a template.

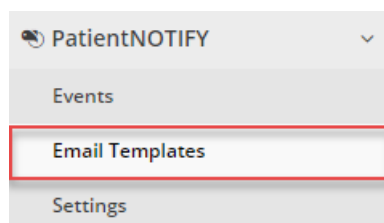
Editing a Template

There are a series of steps that should be followed to edit your template

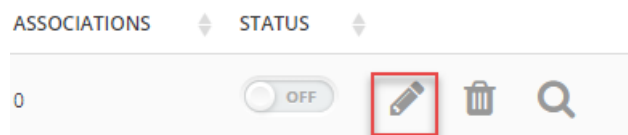
Select the Template to Edit

To select a template to edit:

1. Access OP Notify using the email address and password established when you activated your account.
2. Confirm you are on the correct Practice site that is displayed in the practice dropdown on the top Patient Portal bar.
3. On the left panel click the arrow to expand the **PatientNOTIFY** group.
4. Select **Email Templates**.



5. Locate the template that will be altered.
6. Click the **Edit Pencil** associated with that template. The Email Templates Editor will open. You can edit the template from this location.



Sections

Add a Section

If you want to add a section to the email template:

1. Click the **+ Add Section**.
2. Choose what section you would like to add. Each selection determines how the sections will appear for each area of the email template.

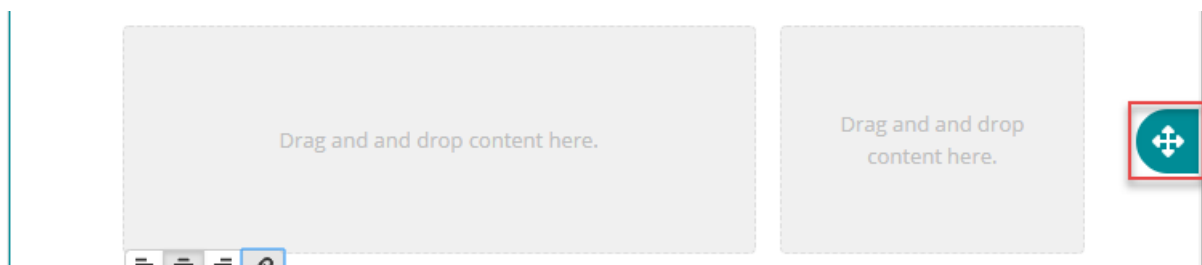


3. Repeat for each section of the template that you would like to add.

Move a Section

Sections can be reorganized within an email template. To move a section:

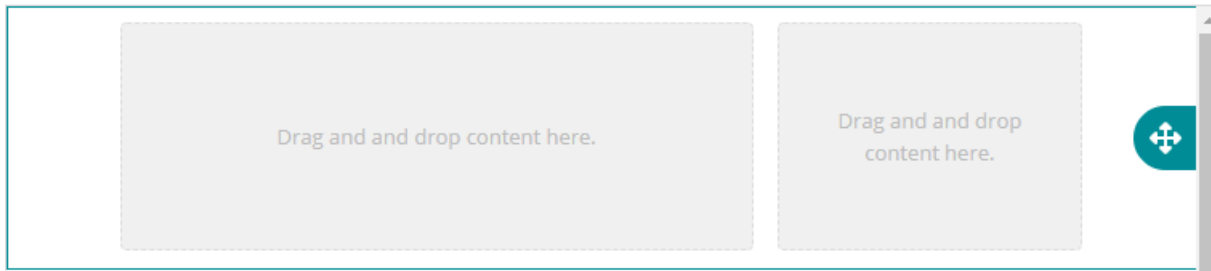
1. Click the section box you want to move.
2. Click the **Move** button.



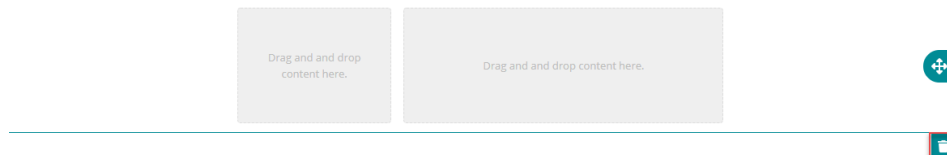
3. Drag the section to the location where you want the section will reside.
4. Repeat for each section that you would like to move.

Delete a Section

1. Move your cursor around a section until the edit box appears.



2. Click the section. The Delete selection appears.



3. Click the **Delete** button (Trash Can icon).



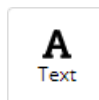
4. Repeat for each section that you would like to remove.

Text Boxes

Add Text to a Section

If there is a section that doesn't already have text and you want to add text to a section:

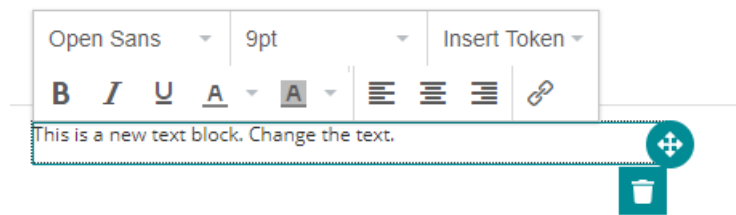
1. Locate the **Text Box** icon.



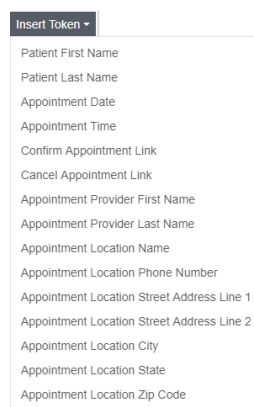
2. Drag and drop the **Text Box** icon to the section where you would like to add text.



3. Click in the text box. The formatting box appears.



4. Enter your text. You can alter the font, size, and formatting for the text.
5. Locate the area of your message where you want to enter a personalized item (example a patient's first name) and place your cursor. The cursor location will indicate where the token will be placed in the message.
6. Select the **Insert Token** drop-down menu.
7. Select the token item that you want to enter into the message.



8. Click out of the text box when you are finished.
9. Repeat for any additional areas where you want to add text in the template.

Edit Text within a Text Box

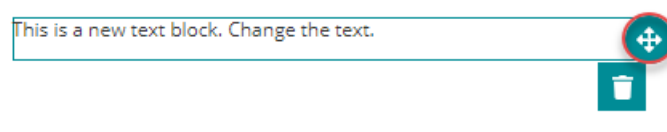
If text already appears in a section:

1. Click within the text box.
2. Alter the text and insert tokens where necessary.
3. Click out of the text box.
4. Repeat these steps for any text boxes that you would like to edit.

Move a Text Box

Text Boxes can be moved from one section to another. To do this:

1. Click the text box you want to move.
2. Click the **Move** button.

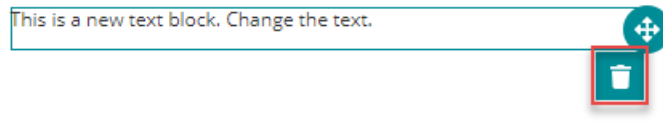


3. Drag the text box to the section area where you want the text to reside.
4. Repeat these steps for any text box you want to move.

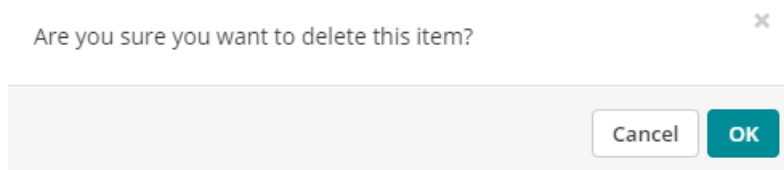
Delete a Text Box

If you wish to delete a text box within a section:

1. Click the text box. The text box will be highlighted with the delete icon.



2. Click the **Delete** icon to delete the text box. The "Are you sure you want to delete this item?" dialog box appears.

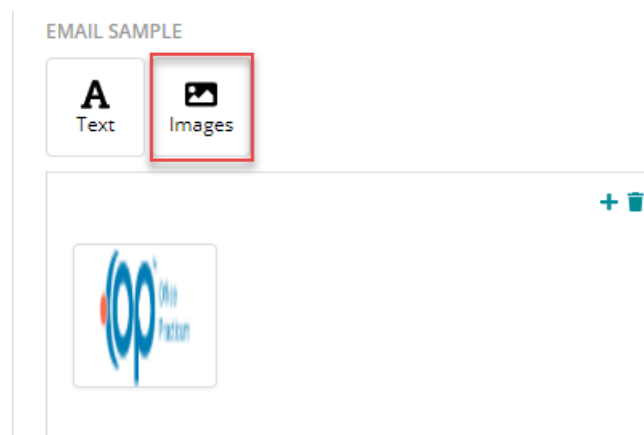


3. Click **OK**.
4. Repeat these steps for any text boxes that you want to delete within the template.

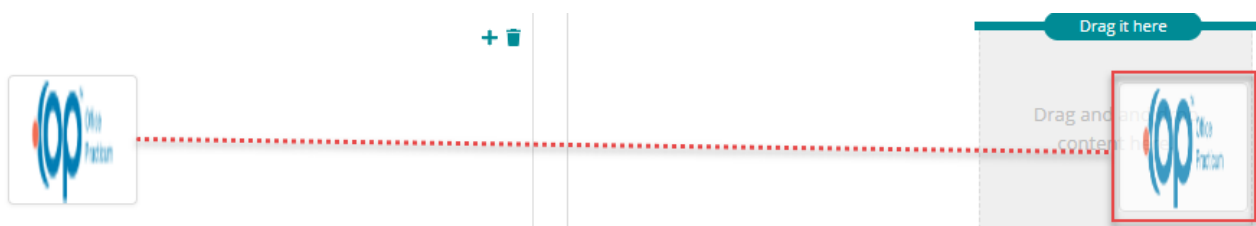
Images

Add an Image to a Section

1. Click the **Image** icon. The Available Image Library appears. If an image you want to add is not in the Image Library, you will need to add the image to the library. To add an image to the available images library, see [Add an Image to the Available Images Library](#).



2. Drag and drop the **Image** icon to the section where you would like to add the image.

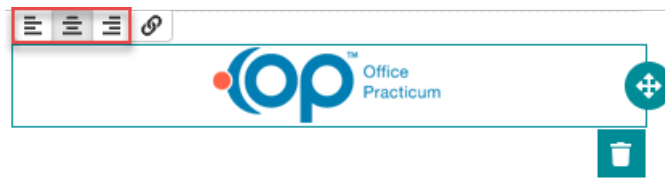


3. Click out of the section box when complete.

Align the Image

After an image is inserted into a section, you can align the image. To do this:

1. Click the image within the section.
2. Click the Left Align, Center Align, or Right Align buttons to adjust the location of the image within the section.

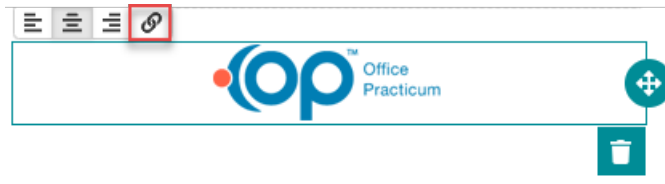


3. Click out of the section when the image is properly aligned.

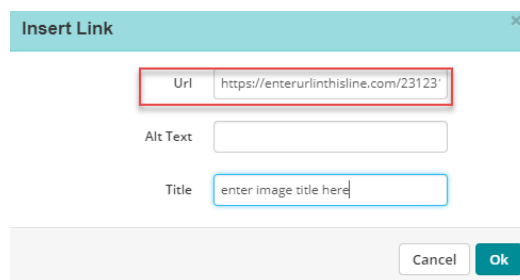
Link the Image

After an image is inserted into a section, you can link the image. To do this:

1. Click the image within the section.
2. Click the **Link** button. The Insert Link window appears.



3. Insert the URL in the **URL** field.

A screenshot of the Insert Link dialog box. The dialog box has a title bar that says "Insert Link" with a close button (X) on the right. Inside the dialog box, there are three input fields: "Url" with the value "https://enterurlinthisline.com/23123", "Alt Text" with the value "enter image title here", and "Title" with the value "enter image title here". At the bottom right of the dialog box are two buttons: "Cancel" and "Ok".

4. Enter the link title in the **Title** field. The title will appear when a reader hovers the cursor over the image.

Insert Link

✕

Url

https://enterurlinthisline.com/23123'

Alt Text

Title

enter image title here

Cancel

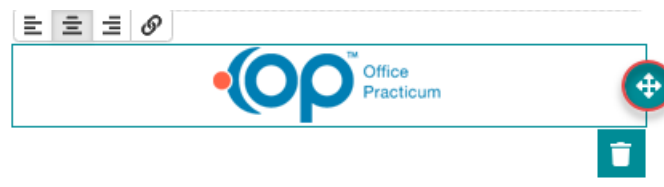
Ok

5. Click the **OK** button.

Move an Image

Images can be moved from one section to another. To do this:

1. Click the image that you want to move.
2. Click the **Move** button.

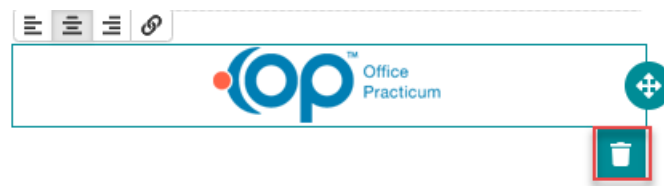


3. Drag the image to the section area where you want the image to reside.

Delete an Image within a Section

If you wish to delete an image within a section:

1. Click the image. The image box will be highlighted with the delete icon.



2. Click the **Delete** icon to delete the text box. The "Are you sure you want to remove this item from this section?" dialog box appears.

Are you sure you want to remove this item from the section?

✕

Cancel

OK

3. Click **OK**.

Save the Template Edits

After your edits are complete, save your edits by clicking the Save button.

Save

Settings

Preview