

Configure Delivery Rules for Automated Messages

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 This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

Path: Practice Management > Schedule > Tracking > Automated Message button

About

Once you have established your Global Settings for Automated Messages, you will be able to access Automated Messages to establish template delivery rules. Using our [Standard Message Templates](#), configure the delivery rules around reoccurring messages that you only have to worry about setting up once.

Q&A

User Permission: All System Administrators will automatically be granted access to view, create, edit, delete, disable and enable Automated Messages. Users not in the System Admin user group will need to have the **Messaging_View_Automated_Messages** permission.

Note: Users must also have the **PMX permissions**. See the [Configuring PMX](#) article for more details.

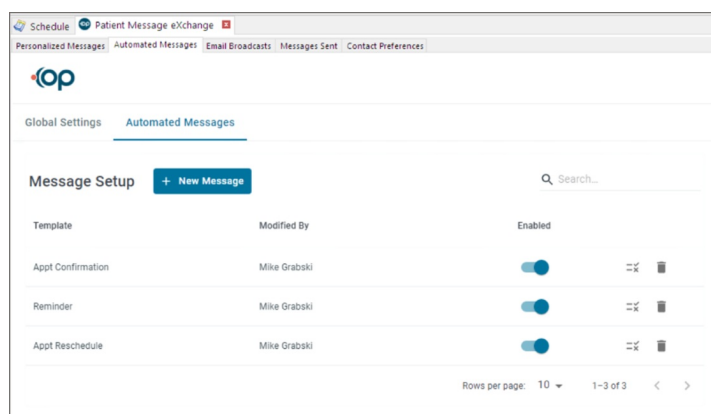
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Navigate the Automated Messages Tab

To view the Automated Messages tab:

1. Navigate to **Practice Management > Schedule > Tracking > Automated Message** button. The Automated Message tab will open.





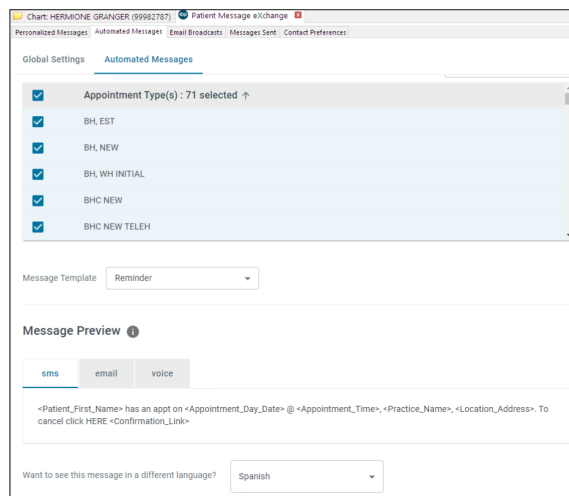
Note: The Messages shown in the image above do not come setup in your Automated Messages. You will need to create new messages and configure the delivery rules. See the Create Automated Messages section below.

2. By default, the Automated Messages tab view will show a list of currently configured message templates. The list will show:
 - **Template:** Message Template Name.
 - **Modified By:** User that last modified the Message.
 - **Enabled:** Enabled status (toggle Active/Inactive).
 - **Edit button** (checklist): Allows you to edit the selected message.
 - **Delete button** (Trash Can): Allows you to delete the selected message.
3. Search for Automated Messages using the **Search** bar at the top right.
4. Filter and sort named columns by clicking the **column header** or the **filter** icon.

Configure Delivery Rules for Automated Messages

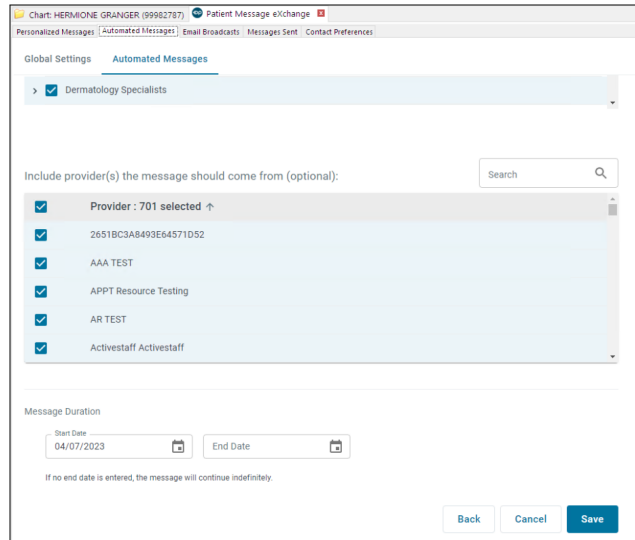
With Automated Messages, there is a one-time setup for each recurring message you want to send out. You are able to setup automated messages by configuring the delivery rules using the standard message templates, including specifying Appointment type(s), timeframes for delivery, and and Sender (Practice, Location, and/or Provider.

1. Navigate to the Automated Messages tab following the path above.
2. Click the **New Message** button.
3. Page 1 of the New Message screen opens. Complete the following fields:
 - **Appointment Type** (*required*): Select the checkbox next to one or more individual appointment types, or select the checkbox next to Appointment Type(s) to select all.
 - **Message Template** (*required*): Click the drop-down and select the desired message template from the list. The Message templates you can select are:
 - Appt Confirmation
 - Appt Confirmation w/ fee
 - Reminder
 - Reminder to Reschedule
 - Confirm/Review the **Message Preview**: This section will show you a preview of the message based on the template selected.
 - You can click the **SMS, Email, or Voice** tabs to view the message template preview for each medium.
 - You can click the **Want to see this message in a different language?** drop-down to switch the preview language between English and Spanish.



Note: The language the message will be sent in is based on the recipient's language preferences. Selecting from the drop-down here only shows a preview of the message in that language.

4. Click the **Next** button.
5. Page 2 of the New Message screen will open. Complete the following fields:
 - **Practice(s) and/or Location(s) (required):** Click the checkbox next to one or more practice(s) or location(s) the message should come from.
 - **Providers:** This field is optional. Click the checkbox next to one or more provider(s) the message should come from.
 - **Message Duration:** Enter the **Start Date (required)**. The **End Date** is optional. If you do not enter an End Date, the message will continue indefinitely.

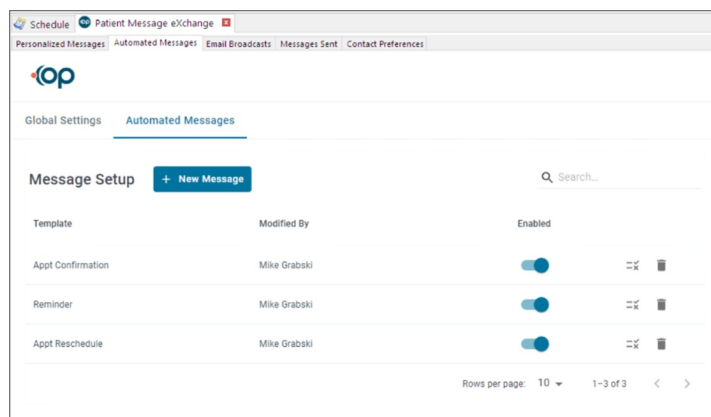


6. Click the **Save** button.
7. You will be taken back to the list of Automated Messages. The Automated Message you just created will be listed, and will be queued for delivery based on the criteria selected.

Edit the Delivery Rules for a Configured Automated Message

If you have configured the delivery rules for an Automated Message, you still have the ability to edit them. All existing Automated Messaging rules are displayed in the Automated Message tab in a list view. To edit a rule:

1. Follow the path above. The Automated Message tab will open.





Note: The Messages shown in the image above do not come setup in your Automated Messages. You will need to create new messages and configure the delivery rules. See the Create Automated Messages section below.

2. Click the **Edit** icon (checklist) next to the desired Automated Message rule.
3. Make the desired changes on Page 1.
4. Click the **Next** button.
5. Make the desired changes on Page 2.
6. Click the **Save** button.
7. The updated message will appear in the list view.

Delete a Configured Automated Message

You have the ability to delete one or multiple configured Automated Messages that are displayed in the Automated Messages tab list.

1. Navigate to the Automated Messages tab following the path above.
2. Delete one, or multiple:
 - To delete one: Click the **Delete** icon (trashcan) next to the desired Automated Message rule.
 - To delete multiple: Select the **checkbox** next to each desired message rule, click the **Select All** drop-down, then select **Delete**.
3. The delete message rules will be removed from the list view.

Disable/Enable a Configured Automated Message

You have the ability to disable or enable the configured Automated Messages that are displayed in the Automated Messages tab list.

1. Navigate to the Automated Messages tab following the path above.
2. To disable automated messaging rules (The Automated Message(s) associated to the Message Template will no longer be queued for delivery):
 - To disable one: If the toggle is blue (on) select the **Toggle** icon next to the desired Automated Message rule to switch it off (grey).
 - To disable multiple: Select the **checkbox** next to each desired message rule, click the **Select All** drop-down, then select **Disable**.
3. To enable automated messaging rules (The Automated Message(s) associated to the Message Template will now be queued for delivery):
 - To enable one: If the toggle is grey, select the **Toggle** icon next to the desired Automated Message rule to switch it back on (blue).
 - To enable multiple: Select the **checkbox** next to each desired message rule, click the **Select All** drop-down, then select **Disable**.