Marketing Messages

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Send informational or promotional SMS messages to specific patient groups . You can also use this feature to generate reports on mobile numbers and email addresses for patients with scheduled appointments—which comes in handy if the "Usual Doctor" field isn't filled out on the Patient Details screen.

This feature requires Zedmed v36.9 or later.

Sending a Marketing Messages SMS

Step 1 - Select the recipients

Each time you send Marketing Messages, the recipients are defined using Patient Demographic and Appointment Criteria options. These are filters to refine the patients the SMS is sent to. For example, Medicare Card holders or patients with a Telehealth Appointment.

1. Select the **Marketing** button on Zedmed's **Reception** tab.
2. Define the recipient criteria for the SMS.

   Patient Demographics section:

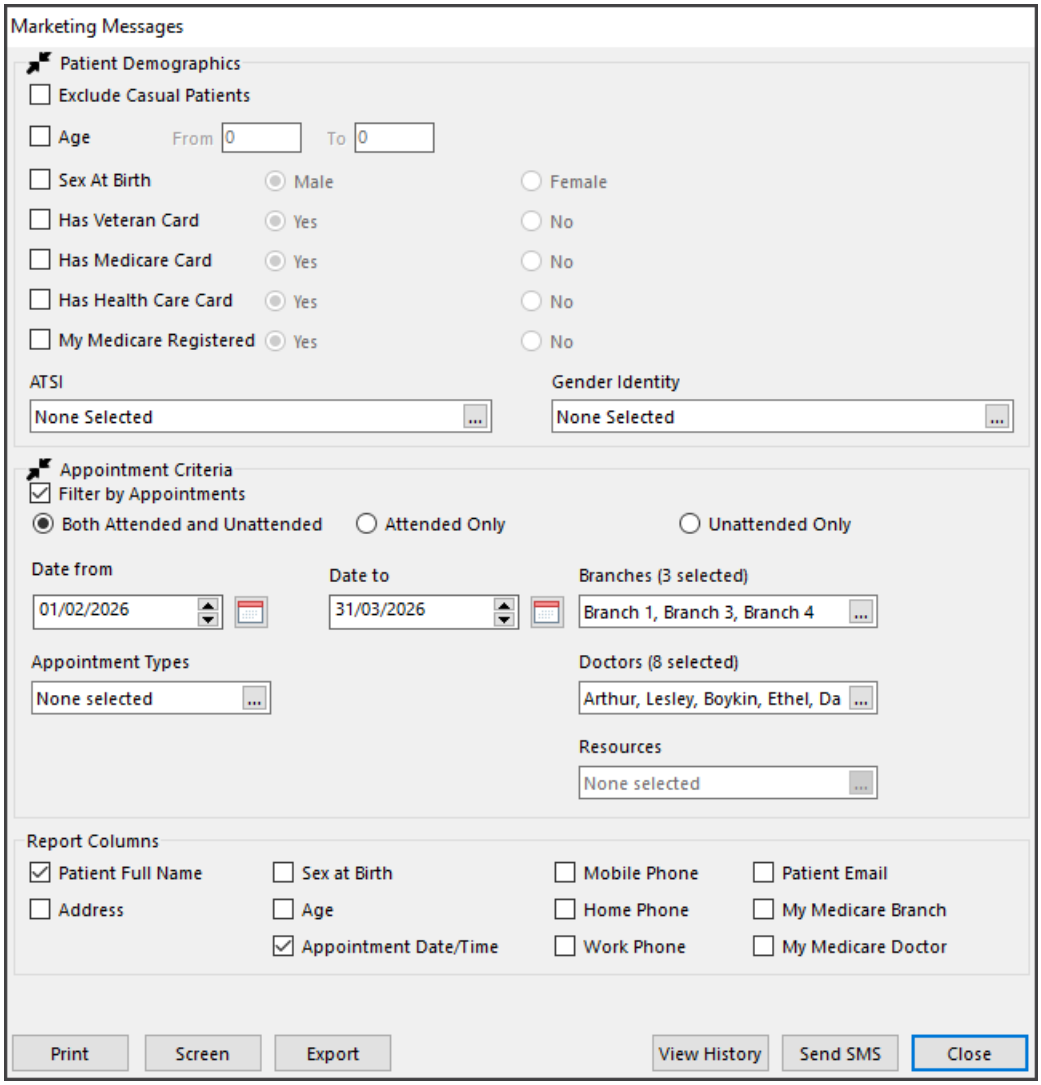
   - Patients with the status Current and Casual in their Patient Records are included. Archived patients are not included.
   - Whether you **Exclude Casual Patients** will depend on the criteria the practice uses for a patient's **Status**.
   - The **Card** types use **Yes No** options to allow you to define requirements for one or more cards.

   Appointment Criteria section:

   - Appointment Date range is a key filter for determining SMS recipients.
   - Selecting a Doctor/s limits the recipients to patients with an appointment with that doctor.
   - Selecting an Appointment Type/s limits recipients to patients with bookings for that Appointment Type.

   - A Branch/selection must be made before doctors can be selected.
3. Select the **Screen** button to review the recipients.

   This will open the report view so you can review the recipients.



Step 2 - Send the SMS

1. Select **Send SMS**.

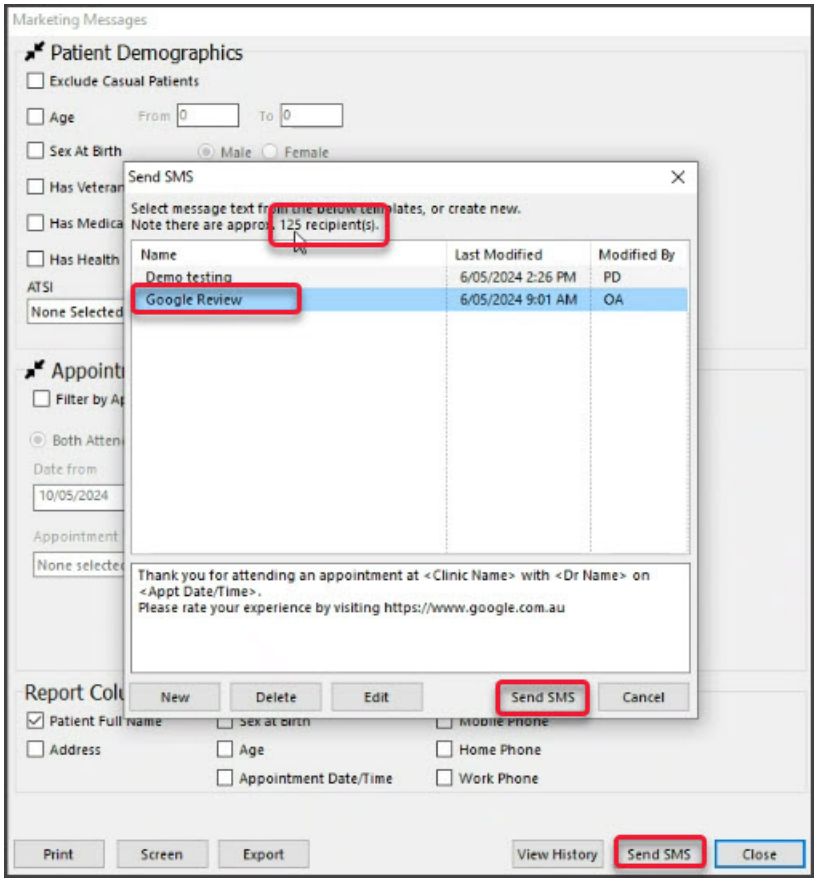
   The Send SMS dialog will open and show the message templates.
2. Select the message template to be used.

   The content of the message will be displayed.
3. Review the number of recipients to avoid unexpectedly large SMS sends.

   The example below shows 125 recipient(s).
4. Select **Send SMS**.

   The messages will begin to send and display the progress at the bottom of the Marketing Messages screen.

   Note: Pressing **Esc** will open a dialog allowing you to select **Yes** to 'Stop sending the remaining messages'.



Creating and editing templates

SMS messages are created as templates that can be reused. There is no limit to the number of templates.

These steps can also be used to edit an existing template.

To create a Marketing Messages template:

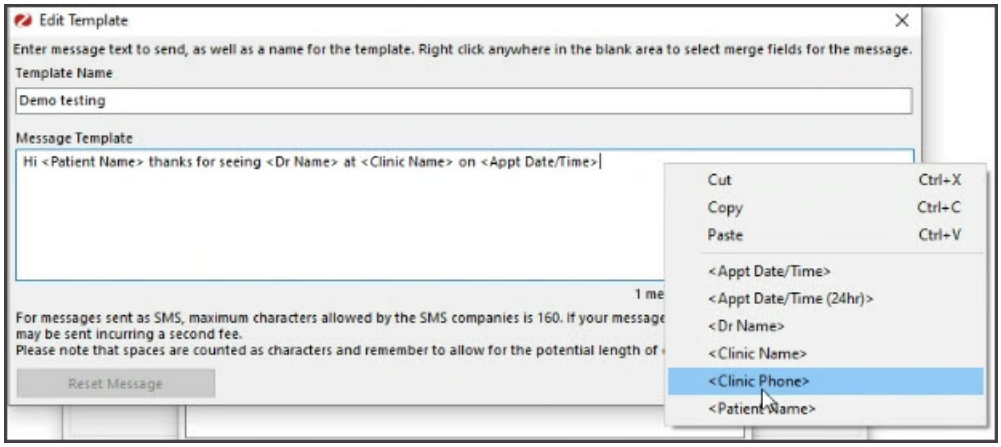
1. Select the **Marketing** button on Zedmed's **Reception** tab.

   The **Marketing Messages** UI will open.
2. Select **Send SMS**.
3. Select **New** (or **Edit**).
4. Add the template name.
5. Add or update the message text.

   Right-click anywhere in the blank area, and the available merge fields will appear.

   Select a merge field to enter it into the message text.
6. Review the character count to see if the SMS will require more than one message to send.
7. Select **Close** to save the changes.

   Note: If you accidentally delete a template, contact Zedmed Support to see if it can be recovered.



Marketing Message history

Past Marketing Messages can be viewed in Message Manager, Patient Records and the View History screen.

Message Manager

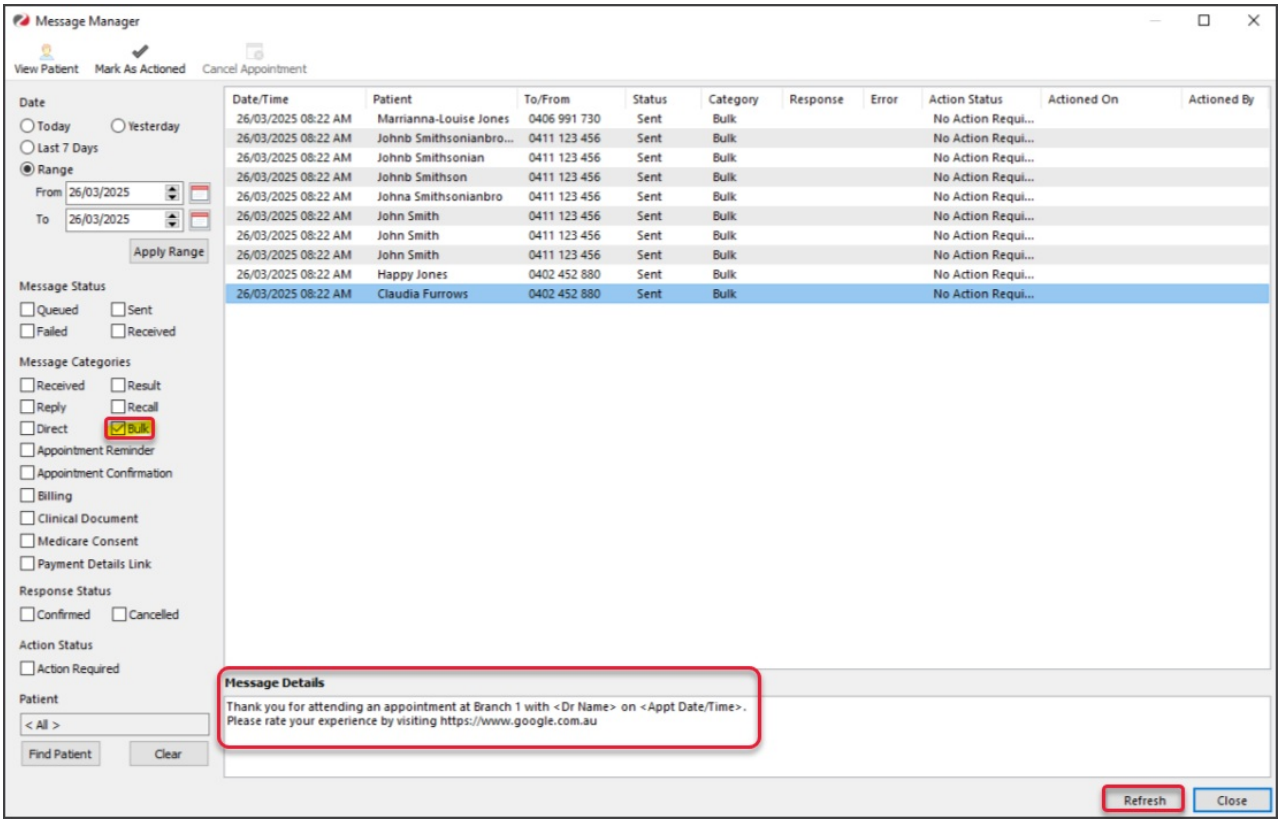
All Marketing Messages are saved and can be viewed in Message Manager using the **Bulk** filter.

To open Message Manager:

1. Select Zedmed's **Management** tab.
2. Select the **Messages** button.
3. Use the **Bulk** filter to view Marketing Messages.

   Selecting a patient (recipient) will show the message content under **Message Details**.

   If you change the date range, select **Apply Range** to update the messages shown.



Patient record

The **Message** tab in a patient's record shows all SMS messages sent to that patient, including any Marketing Messages.

View history

The Marketing Messages View History screen can be used to review the details of past messages, including the criteria that were selected, the number of messages sent, the text used and the recipients.

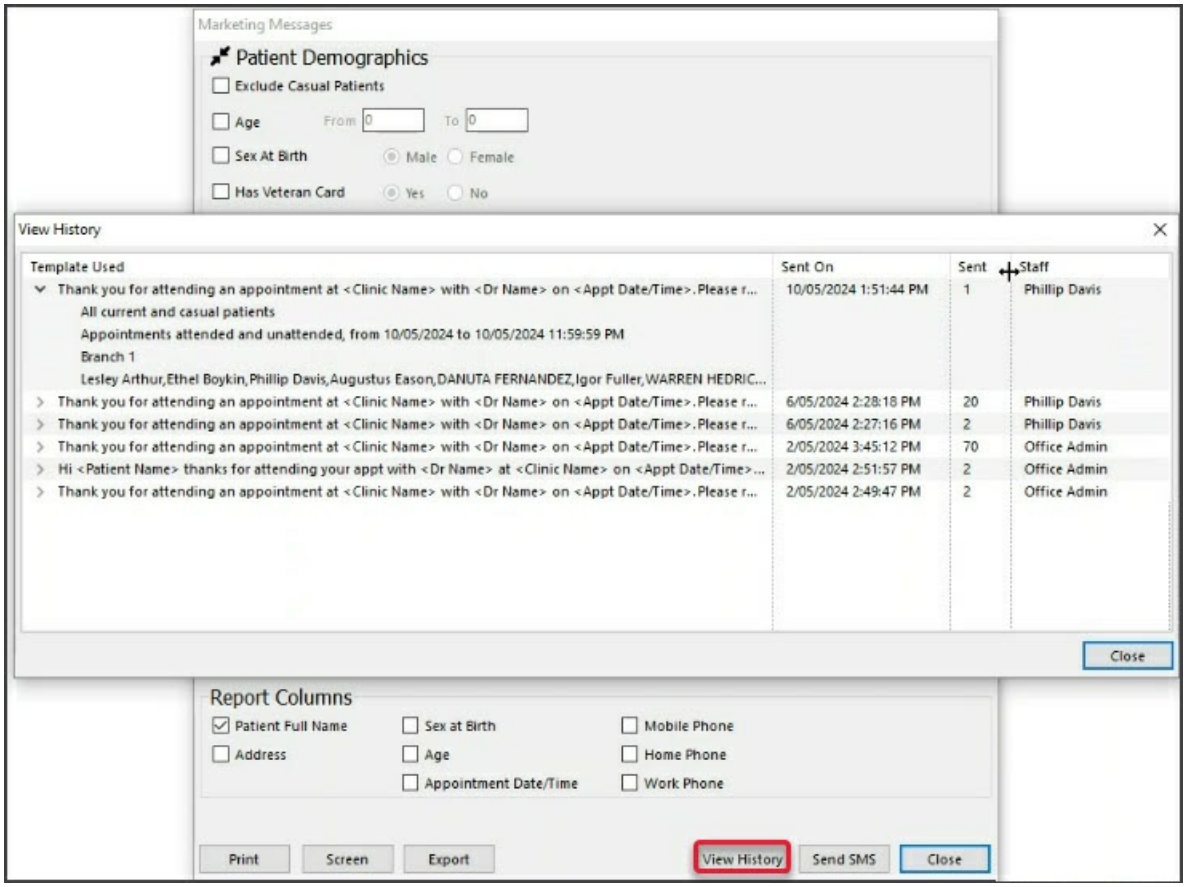
To view the **Marketing Messages** history:

1. Select the **Marketing** button on Zedmed's **Reception** tab.

   The **Marketing Messages** UI will open.
2. Select the **View History** button.

   The **View History** screen will open.

   There is a line for each SMS sent with the date and number of messages sent.
3. Expand a specific SMS send to view the criteria used.


Marketing Messages
Patient Demographics
Exclude Casual Patients
Age
From 0
To 0
Sex At Birth
Male
Female
Has Veteran Card
Yes
No
View History
Template Used
Sent On
Sent
Staff
Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...
10/05/2024 1:51:44 PM
1
Phillip Davis
All current and casual patients
Appointments attended and unattended, from 10/05/2024 to 10/05/2024 11:59:59 PM
Branch 1
Lesley Arthur,Ethel Boykin,Phillip Davis,Augustus Eason,DANUTA FERNANDEZ,Igor Fuller,WARREN HEDRIC...
Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...
6/05/2024 2:28:18 PM
20
Phillip Davis
Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...
6/05/2024 2:27:16 PM
2
Phillip Davis
Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...
2/05/2024 3:45:12 PM
70
Office Admin
Hi <Patient Name> thanks for attending your appt with <Dr Name> at <Clinic Name> on <Appt Date/Time>...
2/05/2024 2:51:57 PM
2
Office Admin
Thank you for attending an appointment at <Clinic Name> with <Dr Name> on <Appt Date/Time>. Please r...
2/05/2024 2:49:47 PM
2
Office Admin
Close
Report Columns
Patient Full Name
Sex at Birth
Mobile Phone
Address
Age
Home Phone
Appointment Date/Time
Work Phone
Print
Screen
Export
View History
Send SMS
Close