

Table of Contents - *Jump to a section below*

[Create an Event Email Template](#)

[Edit an Event Email Template](#)

Create an Event Email Template


1. Log in to the Practice Portal.
2. In the Navigation panel, click the **Patient Notify** arrow and select **Email Templates**.
3. Click the **Create New Template** button and select the template type from the list.
 - Create New Appointment Reminder template
 - Create New On Demand template
4. Enter the **Name** and **Description** of the template.
5. *(Optional)* Click the **Language** drop-down and select a Language. The default is English.
6. Click the **Create New Template** button.
7. Create the template:
 - **Add a Section**
 - a. Click the **+ Add section** button.
 - b. Choose the type of section you would like to add.
 - c. Repeat for each section you would like to add to the template.
 - **Add Text**
 - a. Click the **Text** box and drag and drop to a section to add text.
 - b. Click inside the new text box to display the formatting options that you can use to change the font, size, alignment, etc.
 - c. Type the text that you want to be included in the template.
 - d. *(Optional)* Click the **Insert Token** drop-down to insert tokens based on the scenario (eg. Patient Last name, Appointment Date, Confirm Appointment link, Provider, Location, etc).
 - **Add an Image**

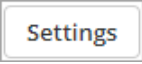
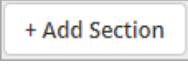




Note: Attachments cannot be sent with an email notification, but you can link to a file stored on your website.

 - a. Click the **Image** button.
 - b. Choose from the available images to drag and drop to the section.
 - c. Click the **+** button to upload an image.
 - d. Drag and drop an image, or click **Choose a File** to select a file from your computer.
 - e. The file is added to the left window. From here you can drag the image and drop it into a content section.
8. When finished, click the **Save** button located in the upper right corner of the window.
9. Click **Back to Email Templates**.
10. Select the template you just created.
11. Under **Status**, click the toggle to change to **ON**. Best Practice is to do this when you're ready to use the template.

[Back to top](#)

Edit an Event Email Template

1. Log in to the Practice Portal.
2. In the Navigation panel, click the **Patient Notify** arrow and select **Email Templates**.
3. Locate the template you want to edit and click the **Edit** button .
4. Perform any of the following edits:

	<p>Change Settings: Click the Settings button to change the Name, Description, or Language of the template. Note: Changing the language does not translate the template.</p>
	<p>Add a section: Click the + Add Section button to add an additional section to the template.</p>
	<p>Move a section: Hover over the section to activate the Selection button. Then, drag and drop the section to a different area of the template.</p>
	<p>Delete a section/element: Click the section or element (Text box or Image) you want to delete, and click the Delete button.</p>
	<p>Add Text box: Click, drag, and drop the Text button on the template. Once added, you can use the Selection button to move the Text box or click the Text box to activate the formatting options and enter text.</p>
	<p>Add Image box: Click the Image button to display the list of images already uploaded or upload a new image.</p>

[Back to top](#)