Creating a New Message Template - Admin Panel

Purpose: Guide an administrator through adding a new template that is shared with all users.

Steps

1. Open **Admin > Copilot Settings > Message Templates**.
2. Confirm **Select Organization** is set to the right organization.
3. Click **Add New**.
4. On the **Create New Template** screen:
   - Enter a **Template Heading**. Example: “Appointment Confirmation”.
   - Enter the **Template Text**. Example: “Based on your request with Simbo, your appointment is scheduled on <appt_time>. Reply Y to confirm. Reply C to change.”
5. Click **Save** to publish the template for your organization.
6. Click **Cancel** if you do not want to save your changes.

Result

The new template appears in the list and is available to all users during SMS chats.

Tips and good practices

- Write in clear, patient-friendly language.
- Keep messages short. Long texts may be split across multiple SMS messages by carriers.
- Use placeholders such as **<appt_time>** only if your workflow supports them. Test before broad use.
- Do not include protected health information that is not required for the purpose of the message.

Revision #2
Created 17 September 2025 12:22:21 by Admin
Updated 18 September 2025 06:57:03 by Admin