Message Templates in SimboConnect: Overview - Admin Panel

Purpose: Explain what Message Templates are and where to find them in Phone Copilot.

What are Message Templates

Message Templates are reusable SMS messages for your front office team. You can save common replies and send them quickly during patient chats. Templates saved in the Admin panel are available to all users in your organization.

Where to find Message Templates

1. Open Phone Copilot and sign in.
2. Select **Admin** on the top navigation.
3. In the left sidebar, open **Copilot Settings**.
4. Click **Message Templates**.

What you see on the list page

- **Search** field to find a template.
- **Select Organization** dropdown at the top center.
- A table with columns for **No.**, **Template Heading**, and **Template**.
- Action icons on each row to **Edit** or **Delete** a template.
- An **Add New** button on the top right to create a new template.

Result

You understand the purpose of templates, where they live, and how the list page is organized.

Tips and good practices

- Keep template headings short and clear so users can find the right message quickly.
- Use the Search box before creating a new template to avoid duplicates.
- Remember that templates created here are shared with everyone in your organization.

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