Sending (Broadcasting) a Campaign From a Template
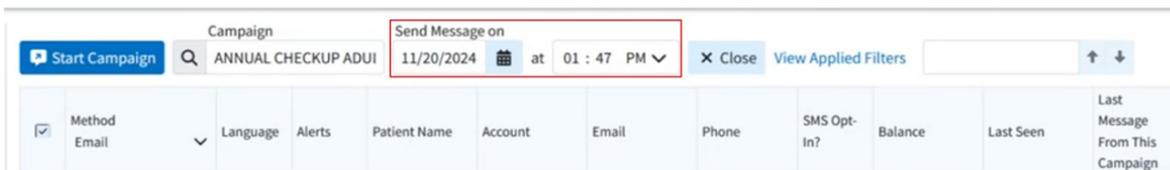
> We recommend using a previously created template to broadcast messages to patients. Visit our
> Add a Broadcast Campaign Template Help Articlefor more information on how to create/save a
> template.

1. Select **Patient** > **Communications...** > **Broadcast Campaign**.

2. Select the "*Use a template*" option from your filters

   1. Search for the pre-built campaign by title or message or browse through the existing campaigns and select your template.

3. Click **Search**.

   1. You will be presented with a preview list of the patients that were retrieved based on the search criteria you selected.

      > 🪄 You can exclude a patient from receiving the communication by unchecking the checkbox next to the patient's name on the list.

   2. Modify the "*Send Message On*" date and time to specify when you want the message to be sent.

      > ⚠️ Please note that when scheduling a campaign communication it must be scheduled at least 5 minutes in the future.

4. Click **Start Campaign**.

   1. The preview window displays the campaign and template title, the number of patients who will receive the message, the date and time of the scheduled send, how they will be sent, and a preview of the message that will be sent.

One-Time Campaign: Annual Checkup: Adult

The **Annual Checkup: Adult** campaign will be sent to 21 patients on 11/21/2024 at 13:00:00.
- 21 emails will be sent

Email

Dear [Patient First Name],

It's time for your **annual checkup** with [Provider Name]! Regular checkups help to monitor your risk for illness and can identify problems early, **before they become serious.**

Most health insurance plans cover the full cost of annual preventive care visits.

To schedule your health checkup, please call our office today at [Office Phone Number].

Sincerely,

[Office Name]

Send Sample

Start Campaign   Cancel

5. Click **Start Campaign.**

> ✨ Your campaign is now scheduled to be sent on your selected date/time. Please visit our Track a Campaign Help Article to see any existing or scheduled campaign messages.