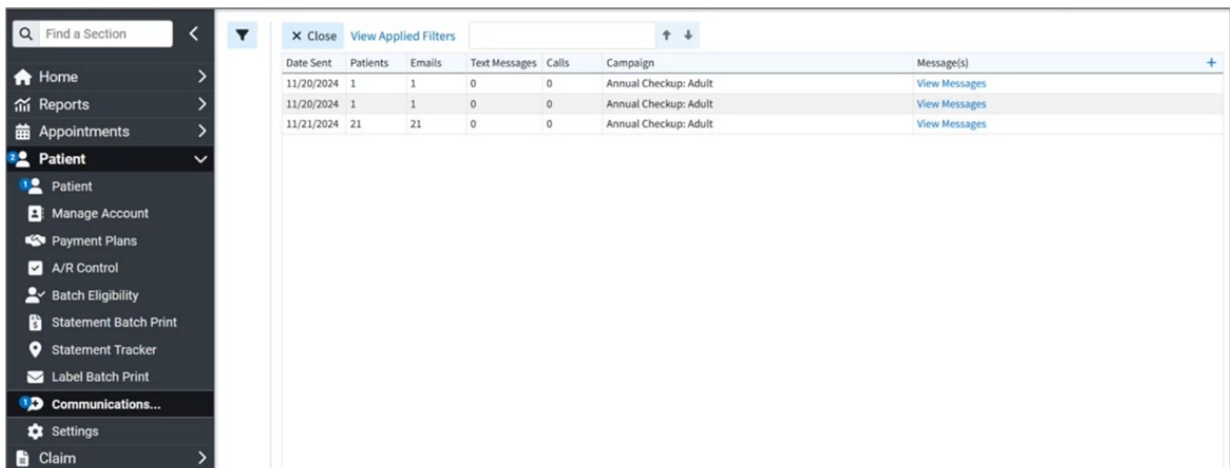


Start a New Campaign From a List


Modified on 12/11/2024 12:41 pm EST

You can send/create a new campaign using the patient list from a previously used campaign. Follow the steps below to search for a current or previously sent Broadcast Campaign list and start a new campaign based on that list.

1. Select **Patient > Communications... > Campaign Tracking**.
2. Enter your desired **Search Criteria**.
 1. **Sent Date:** Use this to select the date or date range to return in the search.
 2. **Campaign Template:** Use this to select a specific Campaign Template to return in the search.
 3. **Patient Search Options:** Use these fields to select specific patient details to return in the search.
3. Click **Search**.
4. A list of all the campaigns that meet your search criteria will be displayed.



Date Sent	Patients	Emails	Text Messages	Calls	Campaign	Message(s)
11/20/2024	1	1	0	0	Annual Checkup: Adult	View Messages
11/20/2024	1	1	0	0	Annual Checkup: Adult	View Messages
11/21/2024	21	21	0	0	Annual Checkup: Adult	View Messages

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange, or add header columns.

5. Click the campaign line you want to open to see a list of all the patients who received (or will receive) the message.
6. Click **Start a New Campaign From This List**
7. Use the Campaign Search Field to search through the existing campaigns and select the template you want to use.
 1. Alternatively, you can click **Start Campaign** to add a new campaign from scratch.

8. If using a template, make one of the following selections:

The selected template has different search criteria than the current results. Would you like to re-run the search with the selected template's default search criteria?

Otherwise, only the campaign's message content will be changed.


Update Patient List & Message Update Message Only Cancel

1. **Update Patient List & Message:** Select this option to update the patient list and message from the template.
2. **Update Message Only:** Select this option to **Only** update the message from the template, but leave the patient list the same.

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

Start Campaign Campaign Send Message on 12/09/2024 at 02 : 59 PM View Applied Filters

<input checked="" type="checkbox"/>	Method	Language	Alerts	Patient Name	Account #	Email	Phone	SMS Opt-In?	Balance
<input checked="" type="checkbox"/>	Preferred	▼							

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

10. Click **Start Campaign**.

11. 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. When finished click **Start Campaign**.

One-Time Campaign: Office Closed on Friday for Maintenance

The **Office Closed on Friday for Maintenance** campaign will be sent to 17 patients on 12/09/2024 at 03:11 PM.
• 17 emails will be sent


Email

Dear [Patient First Name]

We will be undergoing office maintenance on Friday 12/13/2024 and our office will be closed. We will reopen for normal business on Monday 12/16/2024.

Sincerely,
[Office Name]

Save as a new Campaign Template to re-use this message later

 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.
