TXT2Remind Version Number:	4.0
Document Date:	16/03/2018
Security Classification:	Premium Clients

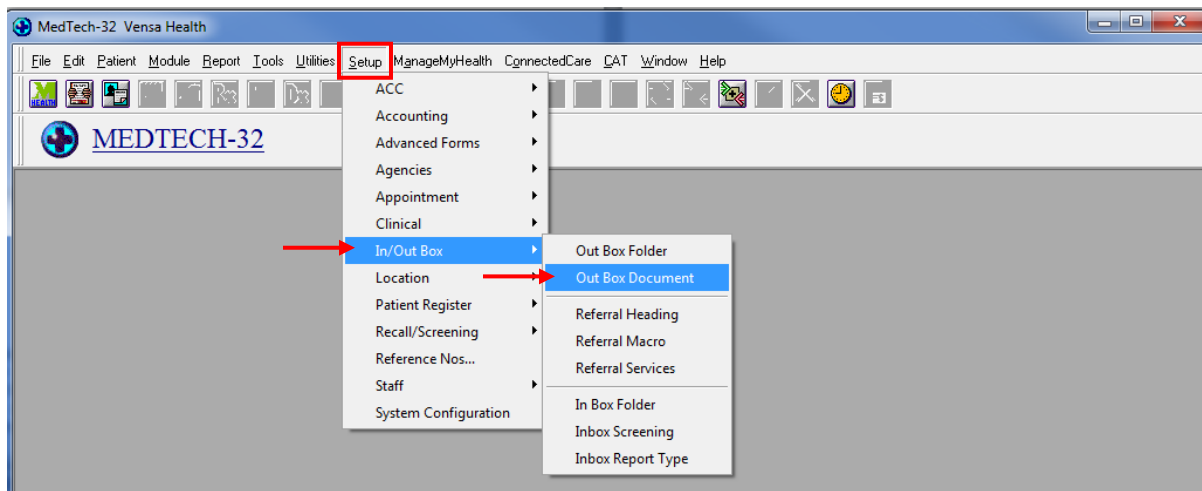# TXT2Remind 4.0

Overdue Accounts Campaign

1 Introduction

The Overdue Accounts Campaign can find a list of patients who have overdue balances at the practice and remind them that payments are due to be made.
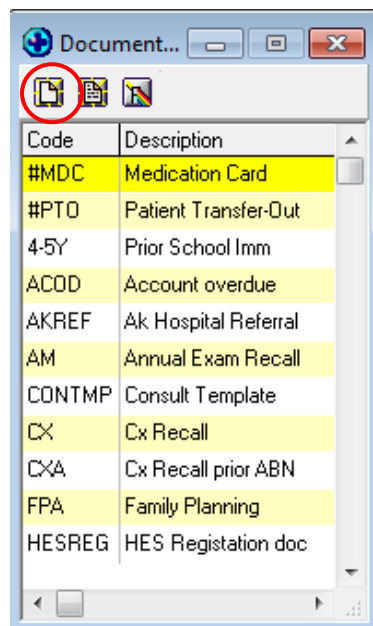
2 Set up your TXT Outbox Document within Medtech

a. Go to Setup, In/Out Box, Out Box Document.

b. Click on the "Add a New Document" icon.

c. When the Document Designer box pops up fill in the fields in red. Ensure the Code and Description has a prefix of TXT. This will distinguish the difference between a hard copy document and a Text document, it will also make it much easier to locate. Choose the TXT2Remind (TXT) folder and select Text (T) for the Format.

[EXAMPLE]. for Overdue Accounts, enter the Code as: **TXTO/D** and the description as: **TXT Acct Overdue.**

d. Click on Document tab and type your message. Use the "Insert" button to insert merge fields that will personalise the message, if you choose. [EXAMPLE ONLY BELOW]
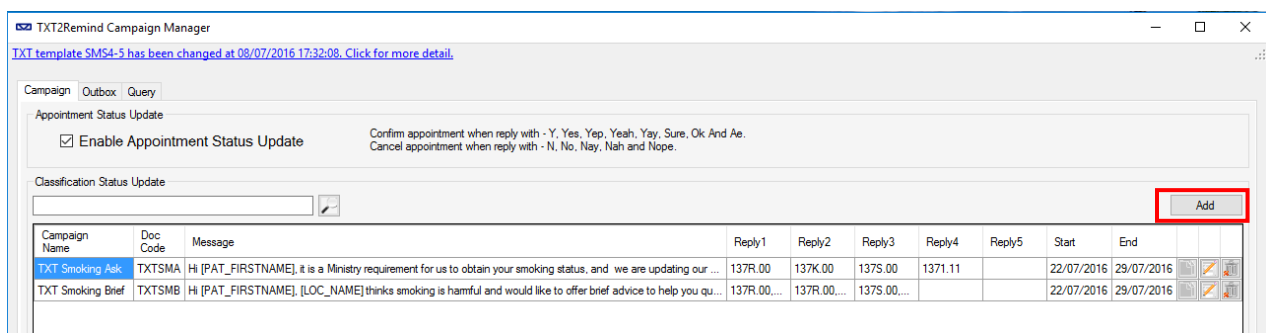

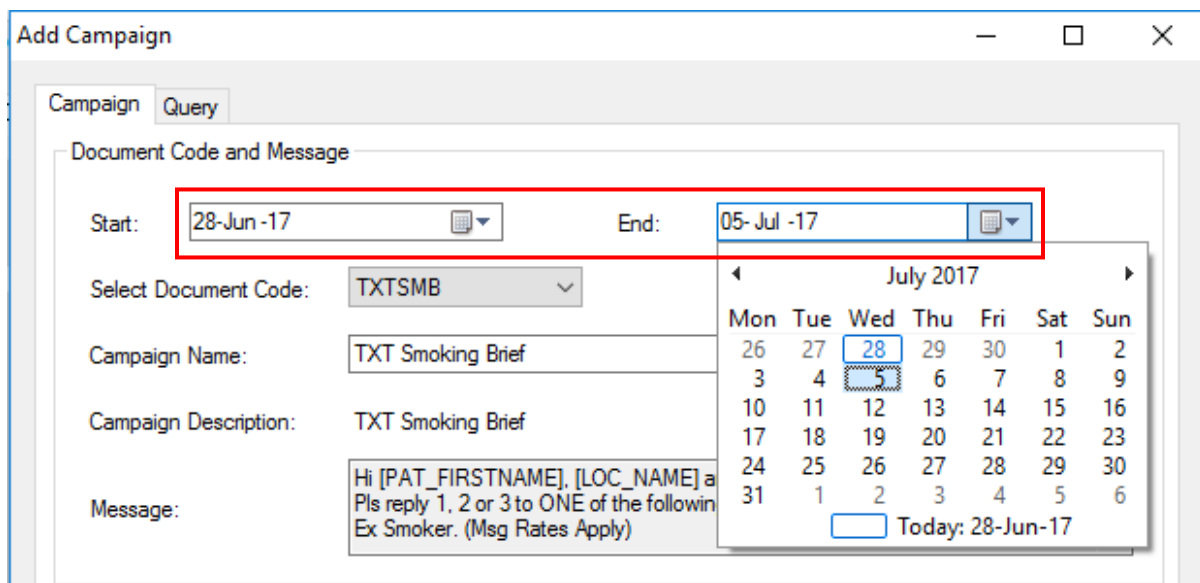e. Click on the OK button to finish.

3 Set up a Campaign

a. Open your Campaign Manager from your Desktop

b. To create a campaign, click 'Add'

c. Once the campaign opens, first select your date range. In this campaign, we are not looking for replies from patients, therefore the date range is not sensitive.

d. Select your document code. This will be the code of the outbox document you will be sending out to your patients.

e. After selecting your document code, change the Campaign Name or leave it as the default. We recommend adding the current date to it though, for ease in finding and using it later. This will auto populate your campaign description and the message from the outbox document created previously. There are no readcodes to assign for this campaign.

f. Now use the Query tab to decide the query parameters – this takes the place of a Query Builder (example only below).

The query will search based on parameters such as the **Balance** owed (Greater than or Equal To), the **Account Group** of the patient (e.g. Registered, Casual, Company) and when they were last invoiced. You can also exclude patients on automatic payment schedules if they have either a separate account group, or an alert for automatic payments. Inputs for these parameters will differ depending on the individual clinic's database set up and preferences.

g. Choose your criteria and click Save.

h. When running another campaign later, you can copy the previous one, just change the start and end dates, date in the campaign name, and query dates if applicable.

4 Sending messages via Campaign Manager

a. Click the Query tab and use the drop down to select the Campaign you are running.

b. Then click Search

c. Searching will generate a list of those patients who fulfil your query criteria. To send to all, select with the tickbox on the left of the window and press Send. You may also scroll through the list and untick individual patients to stop them receiving the text if you choose.

5 View Sent Messages and Number of Replies

To view sent messages and replies received, open your Campaign Manager and select the Outbox tab. Use the drop down menu to find your campaign, change the From: date to the sent date and click the magnifying glass.

Replies will appear in the Status column. Click the coloured box next to the sent message to see the patients reply in the message preview window in the bottom and follow up accordingly.