



monkey
SOFTWARE

Template Editors

Letter, Email & SMS Templates

V1.0

Author: Jonathan Seares

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Monkey Software Pty Ltd

10 Chelmsford Street, Williamstown North Vic 3016

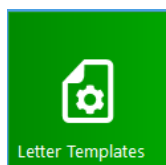
P: 1300 650 295 | NZ Toll Free: 0800 666 539

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START HERE

LETTER & EMAIL TEMPLATES

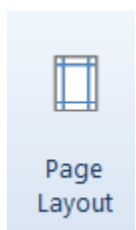
Templates are used for bulk communications functions in Optomate Touch. This will include Appointment Reminders, Lens Order communication, Marketing & Recalls.



Letter & email templates can be created via the Letter Templates editor module found on the main screen of Optomate Touch.

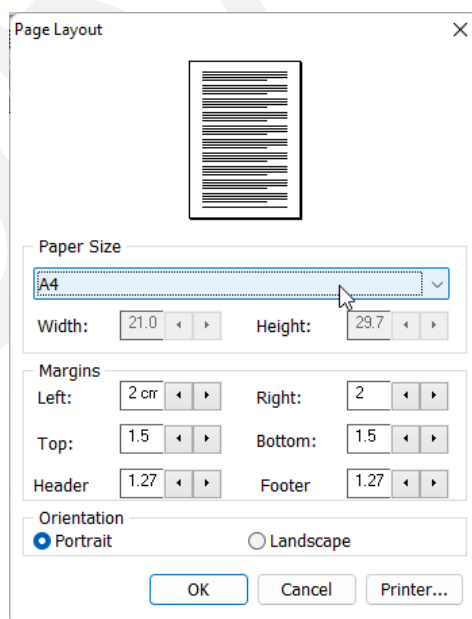


To create a new template, click on the New button. This will open the template editor window.



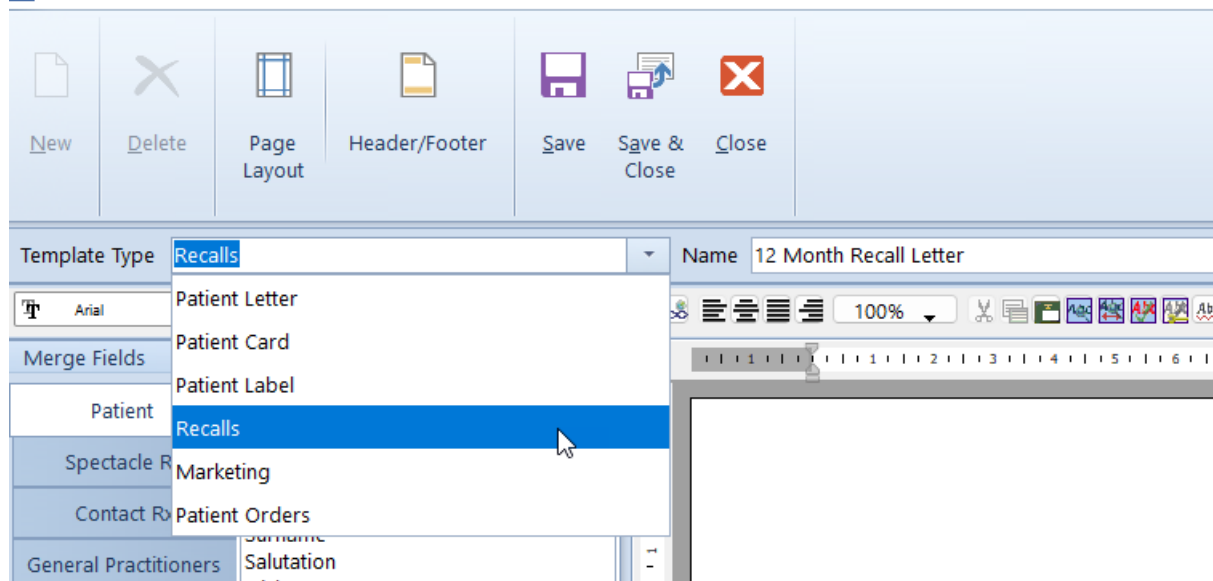
Click on the Page Layout button. The component used for the editor does not default the template paper size and this needs to be set to the correct size for your requirements. The standard in Australia is A4, but you may be wanting to design a template on any paper size available.

At this point you can also manually adjust the margins. Once Paper Size and Margins are set, click on [OK].



Template Editors

Or Letter & Email Templates [Current User: MON]



Select the type of communication that this template is intended for. The template will only be available in the functions associated with the Template Type and give it a Name.

DESIGN TOOLS



Below the Template Type & Name, you will find the layout & design toolbar. These functions will assist with creating a well designed template.

Font format options & Hyperlink creation



.Text alignment Display Zoom Cut/Copy/Paste Find/Replace/Spell Check Options



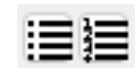
Insert: Image/Symbol/Page No./Page Count.



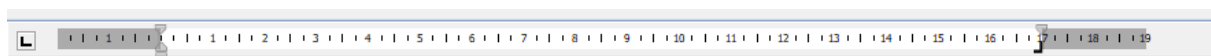
Insert & Format Tables



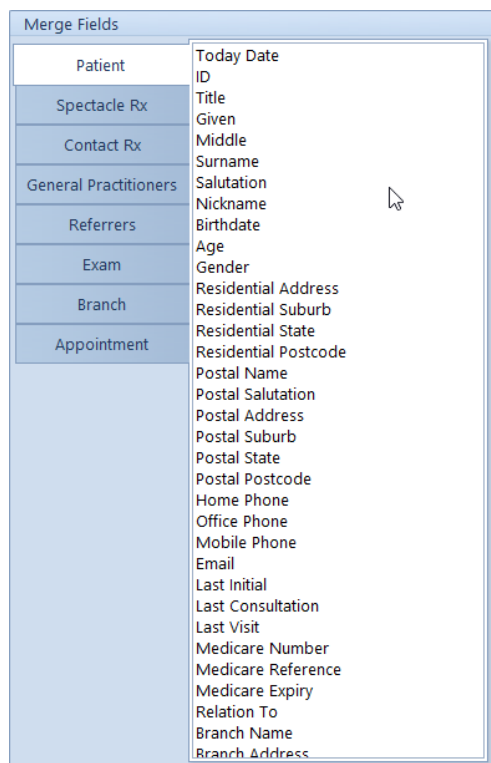
Bullets & Lists



Tab Options & Text Indents & Page Margins



MERGE FIELDS



On the left of the template editor you will find all the available merge fields that can be inserted in to the template.

These fields are replaced by the data from the patient's records.

To insert a merge field in to the document, double click on the field name.

Merge fields are denoted by the red double arrows around the field name.

«Patient Today Date»

«Patient Title» «Patient Given» «Patient Surname»

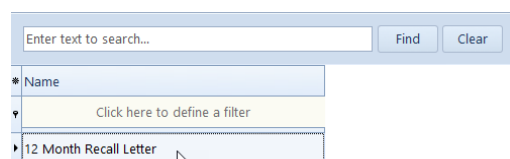
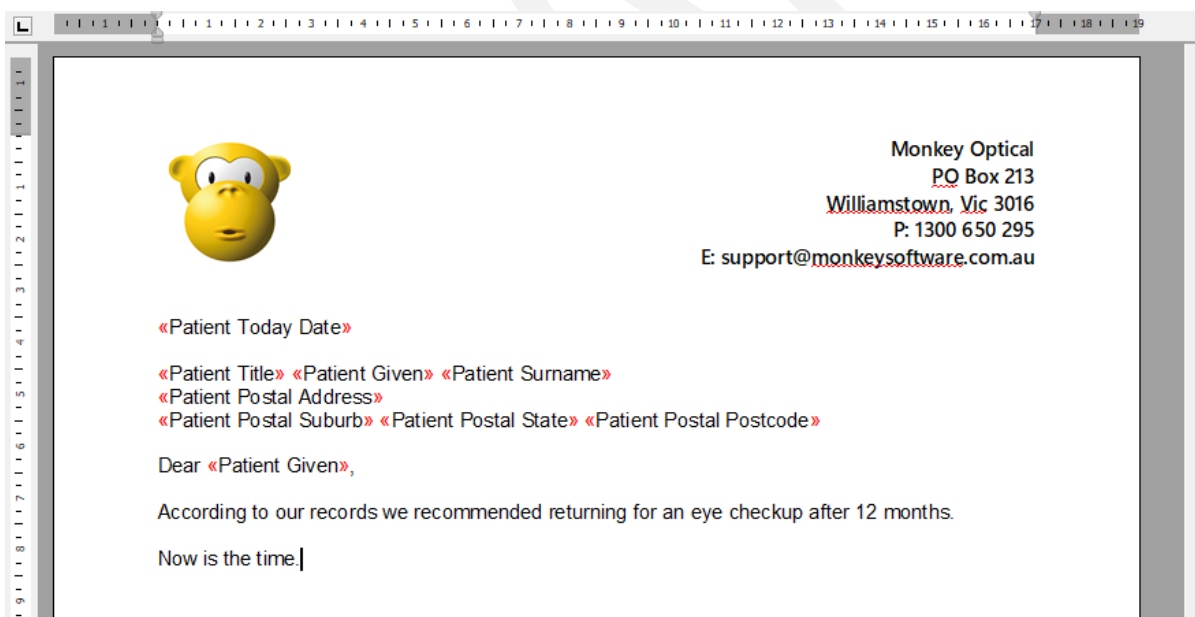
«Patient Postal Address»

«Patient Postal Suburb» «Patient Postal State» «Patient Postal Postcode»

Dear «Patient Given»,

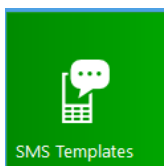
According to our records

When you are happy with the design or need to take a break, click Save or Save & Close.



If you need to edit an existing template, double click on the template name from the main screen.

SMS TEMPLATES



SMS templates are created through the SMS Templates module.



To create a new template, click on the New button. This will open the template editor window.

Similar to the Letter & Email templates, give the Template a name and select the Type of template.

Only the templates that match the type of communication will be available through that bulk function.

Type your message, using the Merge Fields on the right.

SMS templates should be concise. While Optomate Touch allows for longer messages, they are charged in character blocks. The first 160 characters is one message charge. The next 140 characters is a second message charge.

Remember, when counting the number of characters, spaces & returns, that the merge field contents may be longer than the field name in the template.