

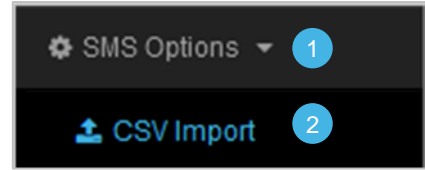
AutoMed - SMS CSV Import Campaign Guide

This guide will take you through how to use the SMS CSV Import Campaign in the AutoMed Dashboard.

Access CSV important

From the main menu:

1. Select **SMS Options**
2. Click **CSV Import**



CSV Import

CSV Import lets you send bulk SMS messages to a specific demographic, e.g. vulnerable patients, diabetic patients, etc.

Please Note: CSV import is *only* to be used for a **small demographic**. For a larger demographic, please use the **SMS Campaign function**.

Important things you need to know:

To send a bulk campaign via CSV import:

- You'll need to run an **internal report** to locate and export the targeted demographic
- This can be done within your **Practice Management System (PMS)**, or using third parties such as **Cubiko** or **Pen CS** to run and export the report
- The first column must be the **Internal ID** in **BP** or **Patient ID** in **MD/PracSoft**. *Do not* include any other patient information
- Files must be exported as a **csv**.
- Smaller messages are delivered faster compared to large text messages.
- Messages are sent between **9am** and **6pm** at a rate for **+/- 3000** per day

CSV Import

↑ Upload CSV

Notes

- Allowed file types csv. Max upload size 6MB.
- Avoid spamming patients as they will opt-out when receiving too many communications.
- The first column must be the **Internal ID** in BP or **Patient ID** in MD/PracSoft. Contact support@automedsystems.com.au for assistance.
- Smaller messages are delivered faster compared to large text messages. Messages are sent between **9am** and **6pm** at a rate for **+/- 3000** per day.

Tips

- First enter your **Message** template, then click "**Browse File**" to locate your file, before you click Upload.
- Clicking the **Upload** button sends the message immediately, please double check your template.
- Adding open lines between sentences in your template is recommended to improve readability of your message.
- It is recommended that you first test your message to yourself, by using the Single Message feature.

Use these tags in your Message.
 [<PIFirstName>, <PILastName>, <PIPrefName>, <PIFullName>]

Message:

900 of 900 characters remaining.

Browse File (.csv)
Upload CSV

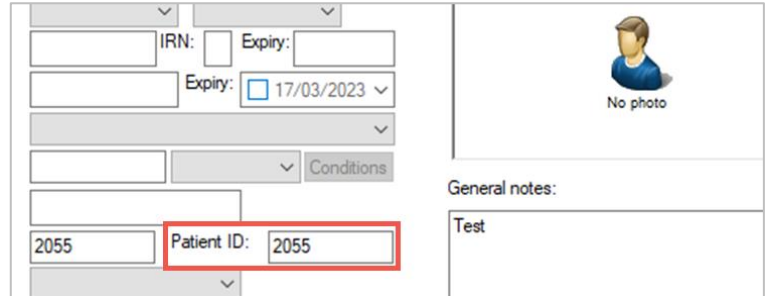
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Creating the CSV file

Using the internal report within your PMS or third parties such as such Cubiko or Pen CS:

1. Locate the **Internal ID** in **BP** or **Patient ID** in **MD/PracSoft**, create and export the report

Best Practice 1



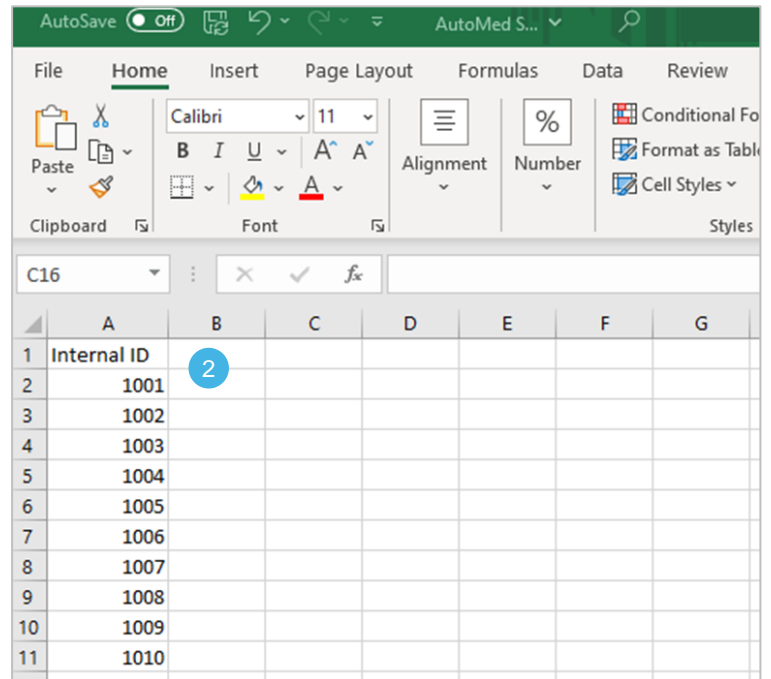
MD/PracSoft

DOB	Address	Medicare	Patient No
	Adghn, POINT COOK. 3030		2
01/01/2000	11 Test, WERRIBEE. 3030		1

2. The CSV file should only include the **Internal** or **Patient ID number**.

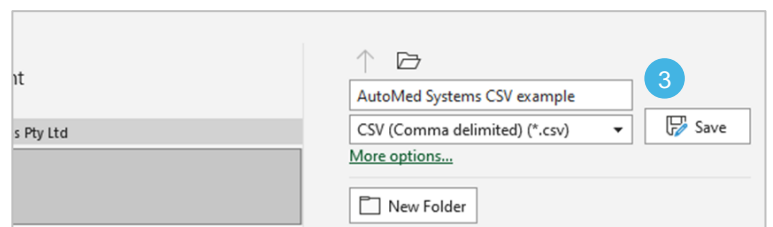
Important: Do not include any other patient information.

Here is an example of what the CSV file should look like:



	A	B	C	D	E	F	G
1	Internal ID						
2	1001						
3	1002						
4	1003						
5	1004						
6	1005						
7	1006						
8	1007						
9	1008						
10	1009						
11	1010						

3. Save the file as a **csv**.



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Create your Message

Before creating your message, here are some important things you need to know:

- Create your message in [Notepad](#) or a [Word Document](#)
- [Review](#) your message before sending to the patient
- Do not exceed [900 characters](#) including spaces – The Campaign will fail
- Avoid [special characters](#), as the characters can display different on devices
- Have your [Practice Name](#) in your message
- Add your [Telephone Number](#) and [Website Address \(URL\)](#) if applicable.
- Use [one](#) of these tags in your Message [<PtFirstName>](#), [<PtLastName>](#), [<PtPrefName>](#), [<PtFullName>](#) if you want the system to populate the patient's name automatically.

Please note - Bulk SMS CSV File imports will *not* read or *support* any other tags.

Test Message

Using AutoMed Systems [Single Message](#), send a test message to yourself to review the message before sending it to patients.

Single Message is located in the Dashboard under SMS Options > Single Message

To send a test message

In Single Message:

1. Enter your [mobile number](#)
2. Write or copy and paste the message in the [text box](#)
3. Click [Send Message](#)

Once you review your message, you can now send it to your patients.

Single Message

Send Message
—

Notes

- **No Tags** are allowed in this message. The text is sent as is.
- The text message is **NOT** recorded in BP or MD/PracSoft when sending to a Mobile number without locating a patient using the "Send Message - Search Patients" function below..

Mobile No*:

Message*:

900 of 900 characters remaining.

Send Message

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Load and send your SMS CSV Import Campaign

Now you are ready to send your SMS campaign,

In CSV Import:

1. Write or copy your message into the text box

Use *one* of these tags in your Message **<PtFirstName>**, **<PtLastName>**, **<PtPrefName>**, **<PtFullName>** if you want the system to populate the patient's name automatically.

Please note - Bulk SMS CSV File imports will *not* read or *support* any other tags.

2. Click [Browse File](#) to upload your CSV file

3. Click [Upload CSV](#) to send your CSV Import Campaign

Use these tags in your Message.
[[<PtFirstName>](#), [<PtLastName>](#), [<PtPrefName>](#), [<PtFullName>](#)]

Message*: 1

900 of 900 characters remaining.

[Browse File \(.csv\)](#) 2

[Upload CSV](#) 3

Your campaign will generate immediately.

Do not resend the campaign.

If you are unsure if the campaign worked, or need further assistance, please reach out to Support - support@automedsystems.com.au

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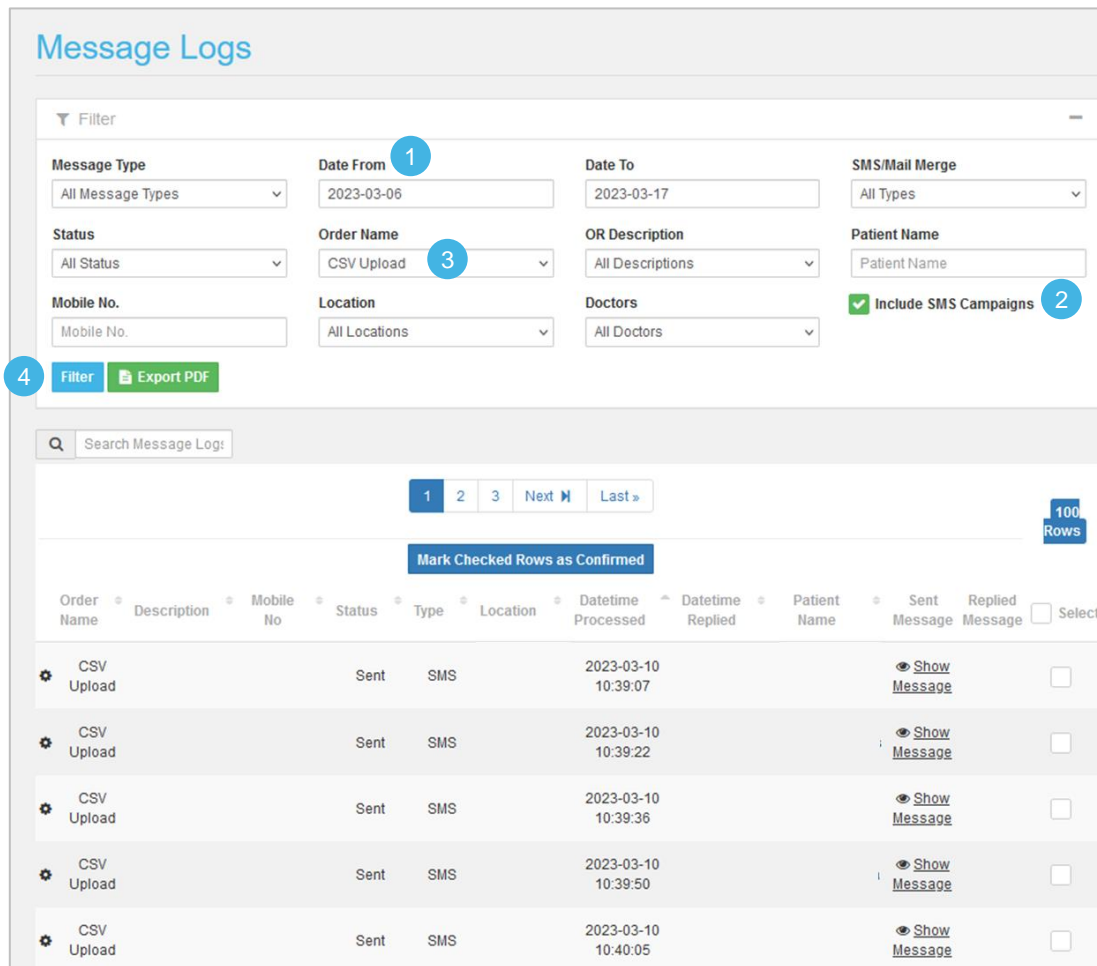
Monitor the SMS CSV Import Campaign

To monitor the SMS campaign, head to the SMS Message Logs in The AutoMed Dashboard.

In Message Logs:

1. Enter the [date range](#) from when you started the campaign
2. Tick Include [SMS Campaigns](#)
3. In Order Name, select [CSV Upload](#)
4. Click [Filter](#)

The Message Logs will show you the SMS messages that have been sent or are queued to go out.



Message Logs

Filter

Message Type: All Message Types

Date From: 2023-03-06

Date To: 2023-03-17

SMS/Mail Merge: All Types

Status: All Status

Order Name: CSV Upload

OR Description: All Descriptions

Patient Name: Patient Name

Mobile No.: Mobile No.

Location: All Locations

Doctors: All Doctors

Include SMS Campaigns

Filter Export PDF

Search Message Log:

1 2 3 Next Last 100 Rows

Mark Checked Rows as Confirmed

Order Name	Description	Mobile No.	Status	Type	Location	Datetime Processed	Datetime Replied	Patient Name	Sent Message	Replied Message	Select
CSV Upload			Sent	SMS		2023-03-10 10:39:07			Show Message		<input type="checkbox"/>
CSV Upload			Sent	SMS		2023-03-10 10:39:22			Show Message		<input type="checkbox"/>
CSV Upload			Sent	SMS		2023-03-10 10:39:36			Show Message		<input type="checkbox"/>
CSV Upload			Sent	SMS		2023-03-10 10:39:50			Show Message		<input type="checkbox"/>
CSV Upload			Sent	SMS		2023-03-10 10:40:05			Show Message		<input type="checkbox"/>

Need further assistance?

Reach out to our [Support Team](#) for any day-to-day assistance with AutoMed System

- Email: support@automedsystems.com.au