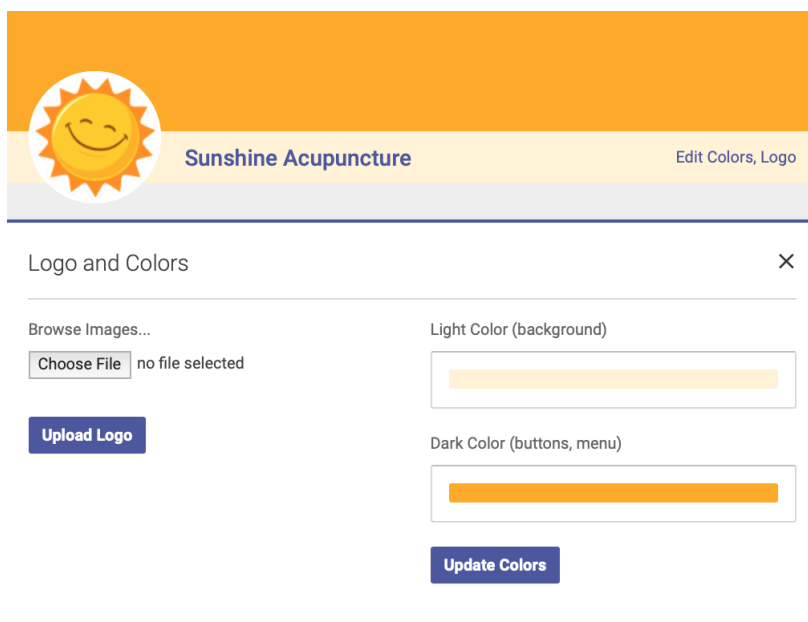


# Settings and Templates

Your settings page is where you set your application preferences, templates and rules for your account, and your patient portal logo and colors. You can get to the Account Settings page by clicking Account —> Settings on the sidebar menu, or by clicking on your clinic's name at the top of the page.

## Logo and colors

Upload your clinic logo and edit colors by clicking the Edit Logo, Colors button next to your clinic name:



The screenshot shows the 'Logo and Colors' settings page for a clinic named 'Sunshine Acupuncture'. At the top, there is a header bar with a sun logo on the left, the clinic name 'Sunshine Acupuncture' in the center, and a link 'Edit Colors, Logo' on the right. Below this is a modal window titled 'Logo and Colors' with a close button (X). Inside the modal, on the left, is a section for the logo with a 'Browse Images...' button, a 'Choose File' button, and the text 'no file selected'. Below this is an 'Upload Logo' button. On the right side of the modal, there are two color selection sections: 'Light Color (background)' with a light yellow color bar, and 'Dark Color (buttons, menu)' with a dark orange color bar. At the bottom of the modal is an 'Update Colors' button.

## Basics

From the basics menu you can set the following preferences:

- **Active:** keep this box checked to allow patients to make appointments online
- **No reminder emails:** check this box if you DON'T want to send reminder emails. If you DO want patients to receive reminder emails, leave this box unchecked.
- **No confirmation emails:** check this box if you DON'T want to send confirmation emails. If you DO want patients to receive confirmation emails, leave this box unchecked.
- **Cancel notifications:** check this box to have notifications of canceled appointments sent to your contact email. Note: you can also see a list of canceled appointments by running a [cancellation report](#).

- **Default payment method:** select whichever payment method your patients use most often. This will be the default method when you record a payment.
- **More than one appt per Block:** By default, patients cannot schedule more than one appointment per block via the patient portal. Checking this box will override that rule and allow a patient to make more than one appointment per Block.
- **More than one daily appointment:** By default, patients cannot schedule more than one appointment per day via the patient portal. Checking this box will override that rule and allow a patient to make more than one appointment per day.
- **Send intake:** when this box is checked, a new patient will automatically receive a link to their intake form when they create their account. Note: this will only work if you've set up your intake forms.
- **Allow checkin without transaction:** checking this box will allow you to check in a patient without having to record their payment at time of checkin. You can record their payment at a later time by following the instructions to [check in without a transaction](#).
- **Hide appointments notes on invoices:** checking this box will [exclude appointment notes](#) when viewing or [printing invoices](#), both for patients and for admins.

## Basics



### Active:

Patients can make appointments



### No Reminder Emails:

Stop sending reminder emails to patients.



### No Confirmation Emails:

Stop sending confirmation emails to patients the day they were made.



### Cancel Notification:

Send an email to artudejoe@icloud.com when patient cancels an appointment.

### Default Payment Method

CreditCard



### More Than One Appt Per Block:

Allow patients to make more than one appointment per block. *This setting restricts appointments by block but with it turned off patients can have more than one service per block.*



### More Than One Daily Appointments:

Allow patients to make more than one appointment per day. *This will override the above if unchecked.*



### Send Intake:

New patients have an intake created and emailed the link.  
*Only true if intakes are setup*



### Allow Checkin without a transaction

By default a transaction is required when checking a patient in.



### Hide Appointment Notes on Invoices

Checking this box will exclude appointment notes when viewing or printing invoices; for both patients and in the scheduler.

Save Basics

# Scheduler Site Settings

In this section you'll store your contact information, website, and the text for your email templates.

## Scheduler site settings

Clinic Name

Sunshine Acupuncture

Contact Email

artdudejoe@icloud.com

Contact Phone

(615) 319-0316

Site Home Page URL

https://encircleacupuncture.com

Cancel Notices Email

artdudejoe@icloud.com

Header Text

Here's the header text! It shows up on the header of your patient portal page!

The text in the **Slogan** field will appear under your clinic's logo on the patient portal login page:



Sunshine Acupuncture: A community  
acupuncture clinic in the Sunshine.

Sign in

Username

Password

The **New Account Instructions** field is where you'll save the instructions patients will see on your website for creating their account:

New Account Instructions (patient website)



Create Your New Account

Here are the instructions patients will see on your website for creating an account.

The **Email sent to new patients** will automatically be sent to a new patient once their account is created:

Email sent to new patients



## Welcome to Sunshine Acupuncture

We wanted to welcome you with all this new stuff we are excited about so sit back and enjoy the ride.

This is the text of the welcome email.

### Here's a heading in the welcome email

- Here's a bullet point
- And another one

**Here's some bold text**

1. You can also do numerical lists
2. Cool, huh?

The **Reminder/Disclaimer Instructions** will go at the end of appointment reminder emails:

Reminder Disclaimer/Instructions (text at the end of the email)



You can add info here that you want to go in a patient reminder email, such as...

- Cancellation policy
- Parking instructions
- Anything else important

The **Cancellation Notice** is where you'll add text for the email a patient can receive when an appointment is canceled.

Cancellation Notice (text at the end of the email)



Here you can add text to the end of the email a patient receives when they cancel an appointment.

## Waiting List Settings

If you want to allow patients to add their names to the daily waiting list via the patient portal, check the Allow Patient Portal Waiting List box and click Save to save your preference.

## Allow Patients To Use The Waiting List

You can allow your patients to add their names to your waiting list for a particular day from the patient portal.

☒ Allow Patient Portal Waiting List

[Save Waiting List Preferences](#)

# New Patient Settings

This is where you'll save settings related to when new patients can schedule appointments. You can:

- Restrict new patients from taking the first slot(s) of a block, using the new patient slot restriction drop-down menu
- Restrict new patients from making more than one appointment by checking the Only One Appointment box
- Restrict new patients from making single-slot appointments by checking the New Patient Double Time box
- Include or omit insurance info on the patient portal.

## New Patients

[Go to each location](#) to disable new patient appointments.

### New Patient Slot Restriction

3 Slots



Restrict a patient from taking the first slots of a block.

☒ **New Patient Only One Appointment:**  
New patients can only make one appointment.

☒ **New Patient Double Time:**  
New patients can only make double-time appointments.

☐ **Include Insurance Info**  
Show insurance form fields on the patients portal

[Save New Patient Settings](#)

# Slot Time Settings

In this section you can add and delete your options for slot duration. To add an option, enter the

number of minutes and click return. To delete an option, simply click on the number in the box on the left.

#### Slot Time Settings

10 15 20

Enter minutes and hit return

Save Slots

## Time Settings

This is where you'll save basic time and fee settings for your scheduler:

- **Minimum and maximum treatment fees** (these can be manually overridden during the checkin process)
- **Time zone**
- **Default start and end times for blocks** (these can be manually changed when creating blocks)
- **Scheduler refresh:** will automatically refresh your scheduler after a period of inactivity
- **Cancel time prior to appointment:** determine how long before an appointment you'll allow a patient to cancel online
- **Time before:** determine how much lead time you'll allow for a patient to make an appointment online

## Time Settings

Minimum Treatment Fee

20.00

Maximum Treatment Fee

100.00

Timezone

Central

Default Block Start

09:00

Default Block End

15:00

Refresh Scheduler Seconds

Every 15 mins

Cancel Time Prior to Appt

12 hours

Time before current time that a patient can make an appointment

2 Hours

Save Selections

# Text Reminder Settings

Note: Only available if you have opted in to the [text message reminder feature](#) for an additional \$5 per month.

## Complete the following steps to activate SMS reminders:

1. Check the Send SMS Reminders box
2. Select your preference for when text messages are sent - they can be sent either 24 or 48 hours before the appointment.
3. Enter your verbiage for your text message - click the [Key to Verbiage Codes](#) button for options to customize your messages.
4. Click Save Texting Preferences and you're done!

See [this reference for the text code variables](#) you can use or click the Key to Verbiage Codes button on your admin page.



## Text Reminders

☒ **Send SMS Reminders**

Messages will be sent approx 24 hours prior to appointments

When to send text message?

24 Hours Before Appointment

Text Reminder Verbiage

Hi [[NAME]]! It's [[CLINIC]] with a reminder of your appointment with [[PRAC]] [[APPTIME]] in [[LOC]]. Call [[LOCPHONE]] to make changes. Reply STOP to end msgs.

Max Characters: 161 / 165

[Save Texting Preferences](#)

[Key to Verbiage Codes](#)

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