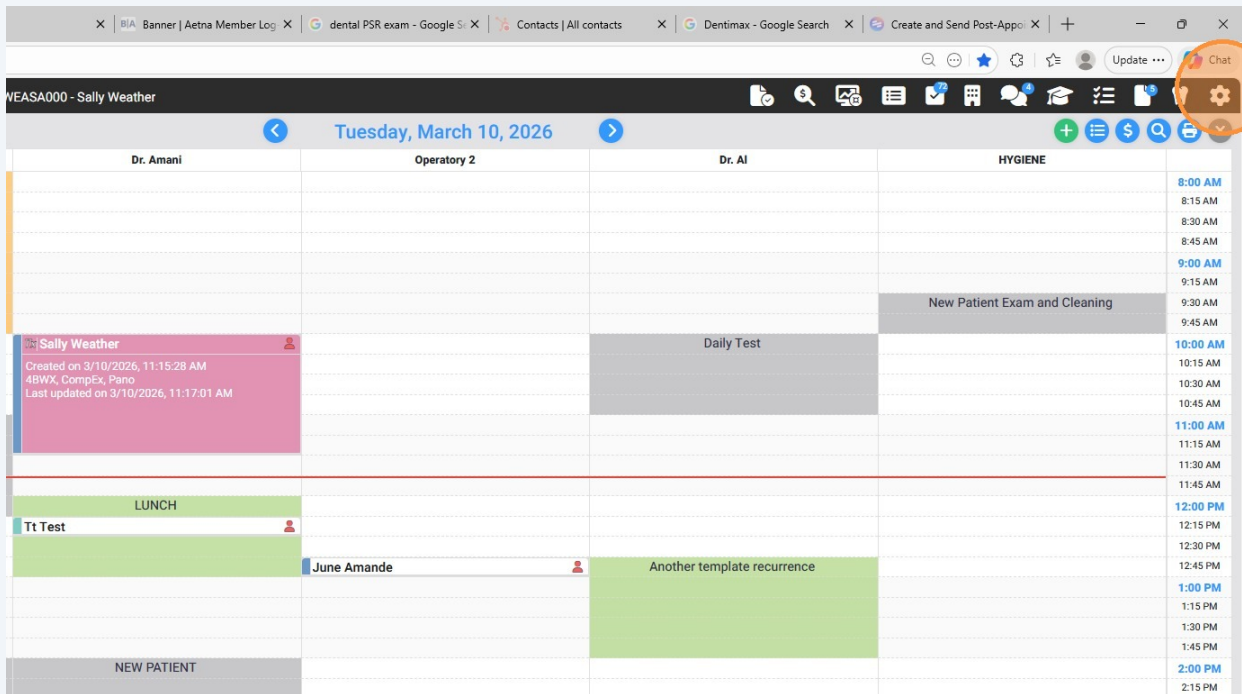


Create and Send Text Templates

Learn how to create custom text message templates for appointment reminders. This guide shows you how to set up new templates, add personalized patient details, and send them out efficiently.

1 To create individual text templates:

Enter practice setup from the "gear icon"



2 Click "Setup"

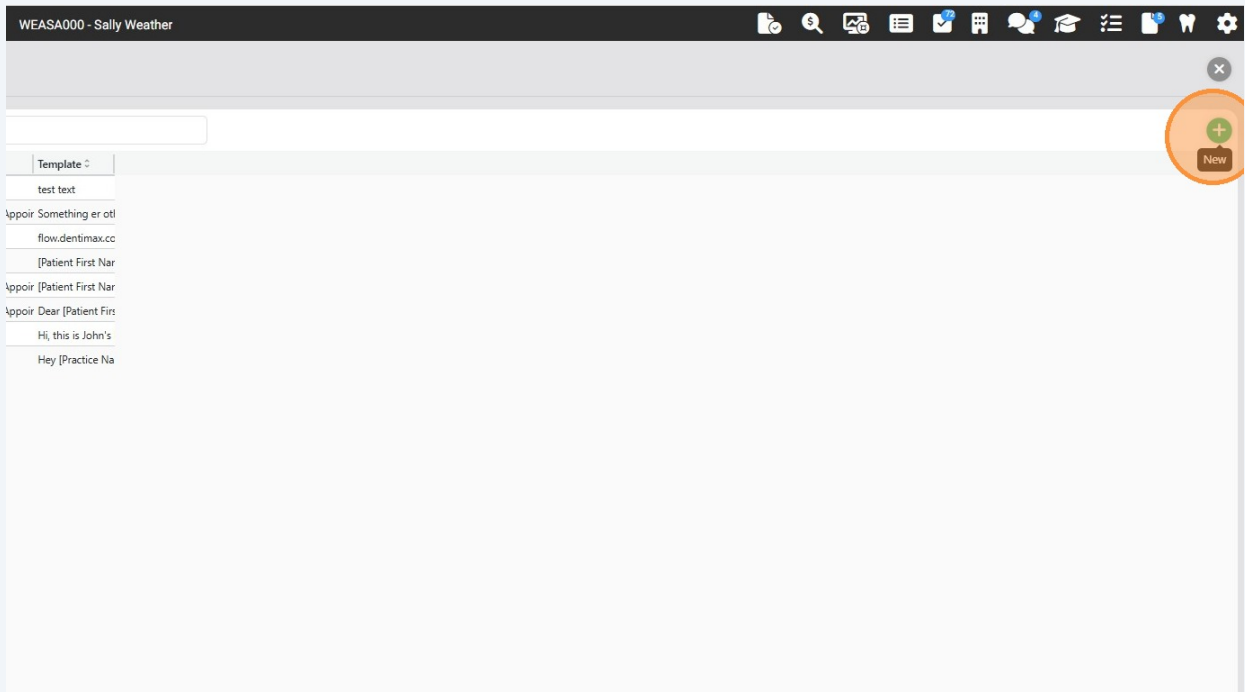
The screenshot displays a dental practice management software interface. At the top, there are browser tabs and a search bar. Below that, the date "Tuesday, March 10, 2026" is centered. The main area is a calendar grid with columns for "Dr. Amani", "Operatory 2", "Dr. Al", and "HYGIENE". A sidebar on the right contains a menu with "Practice Setup" highlighted in orange. The calendar shows various appointments and events, including "New Patient Exam and Cleaning", "Daily Test", "LUNCH", "T1 Test", "June Amande", and "Another template recurrence".

3 Under Patient Communication: select "Custom Templates"

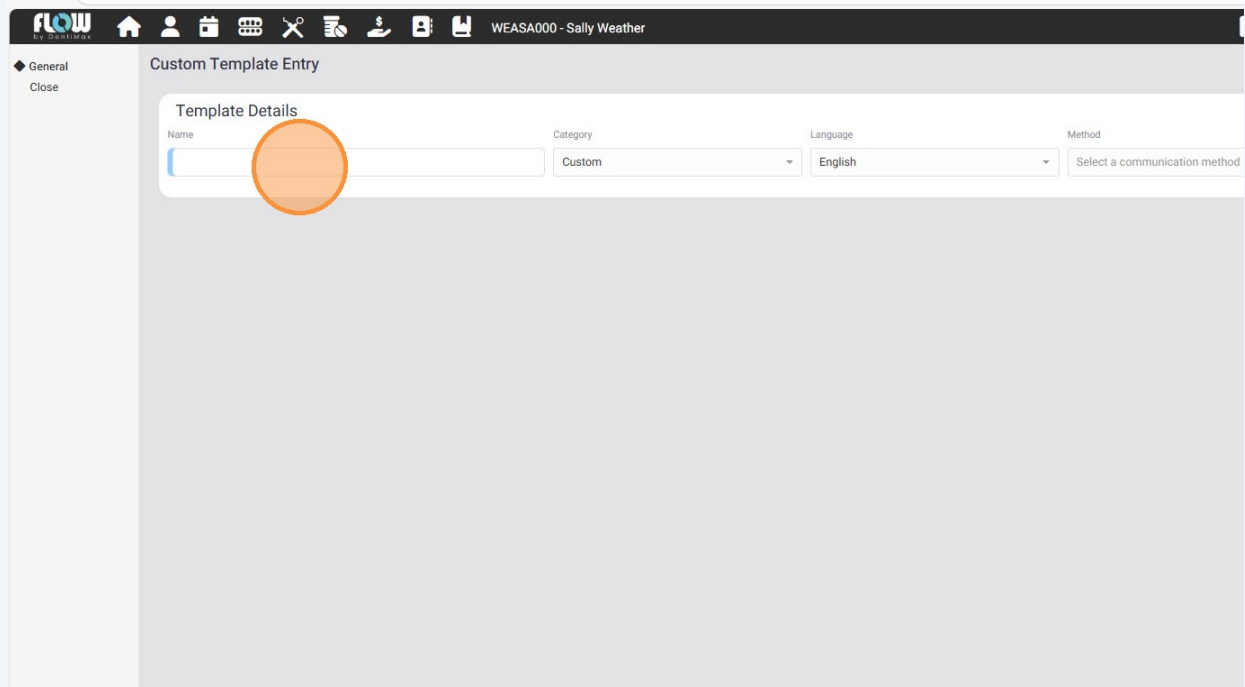
The screenshot shows the "Patient Communication" settings page in the dental practice management software. The page is titled "*John's Dental Practice". The "Patient Communication" section is highlighted in orange, and "Custom Templates" is selected. The page contains various input fields for address, phone, and other contact information.

- Providers
- Schedule Resources
- Required Fields
- Approve User Requests
- Additional Setup
 - Multicodes
 - Alert Codes
 - RX Templates
 - Appt Templates
 - Appt Types
 - Claim Pre-edits
 - Pt. Acknowledgments
 - Online Forms
 - Card Readers
 - Custom Colors
- Patient Communication
 - Automated Messages
 - Custom Templates
 - Additional Settings
 - SMS Opt-out
 - Document Center
- Patient Portal
 - Settings
 - Registration Fields
 - Custom Page
- Accounting Setup
 - Fee Schedule
 - Insurance Plans
 - Default Coverage
 - Service Categories
 - Service Codes
 - Accounting Codes
- System Setup
 - Connections
 - Payment Processing

4 To add a new template: click on the Green +



5 Enter a name for the template

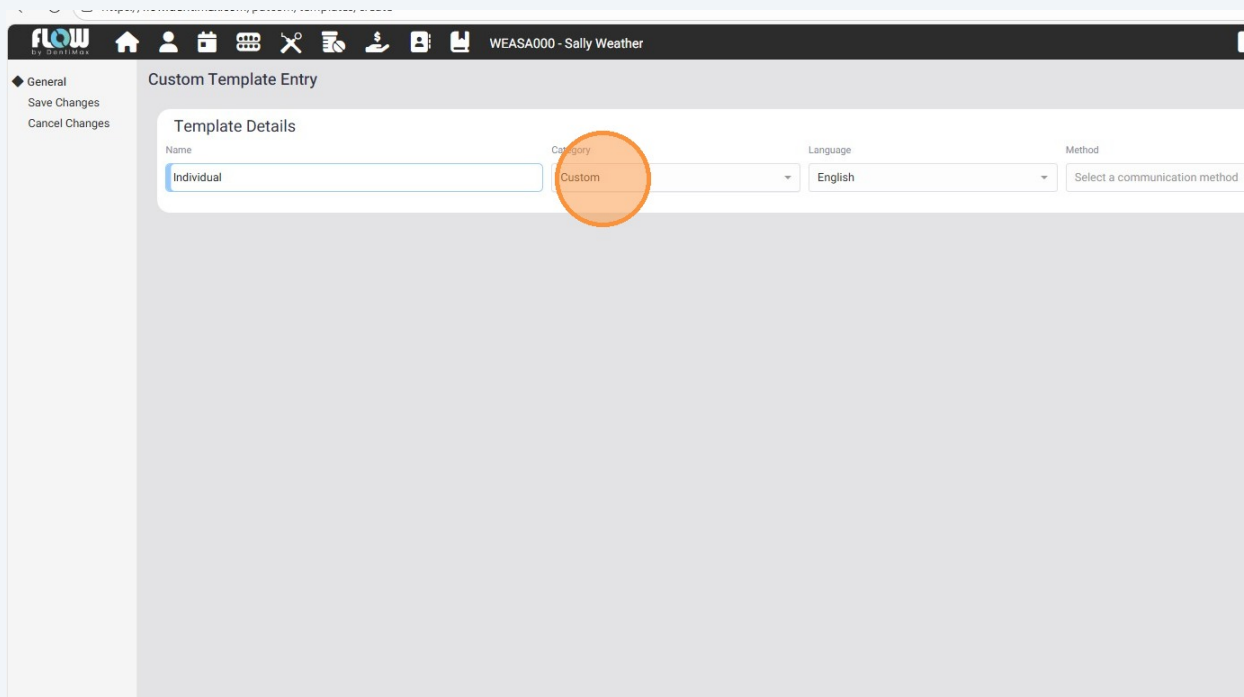


6 Category: From the dropdown menu you will have two options.

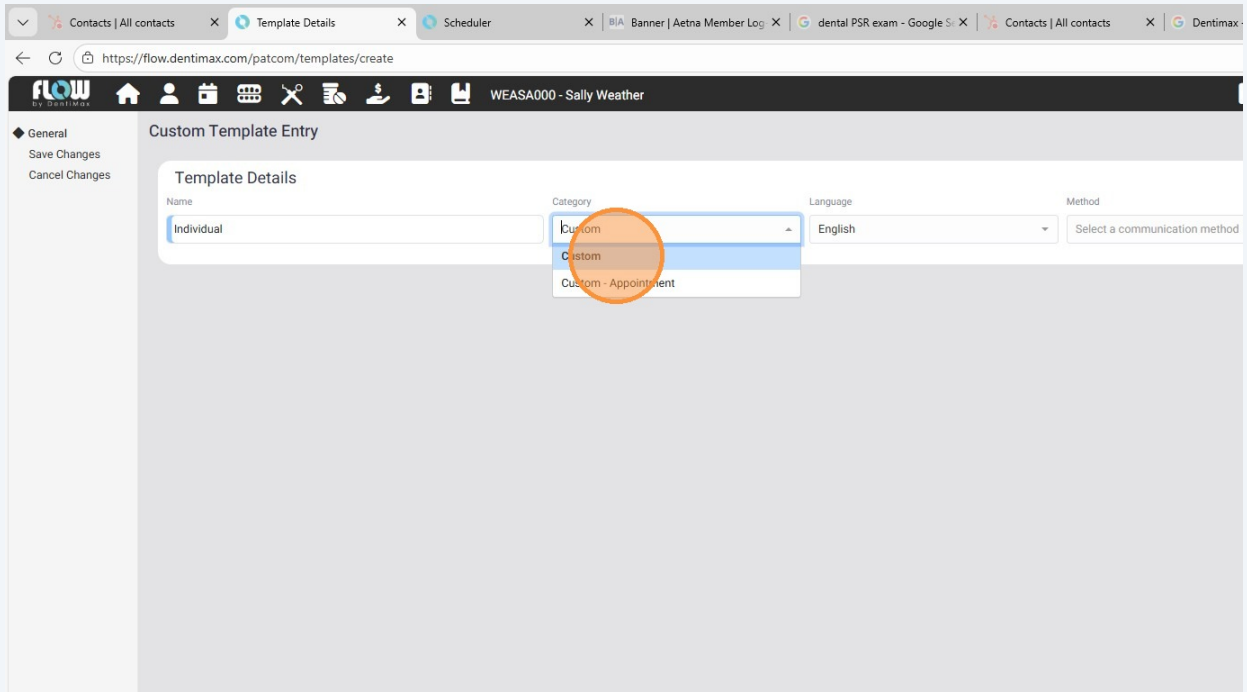
Custom: A custom template that will be available to use when texting the patient outside of an appointment.

Custom Appointment: A custom appointment template will ONLY be available when texting a patient from an appointment.

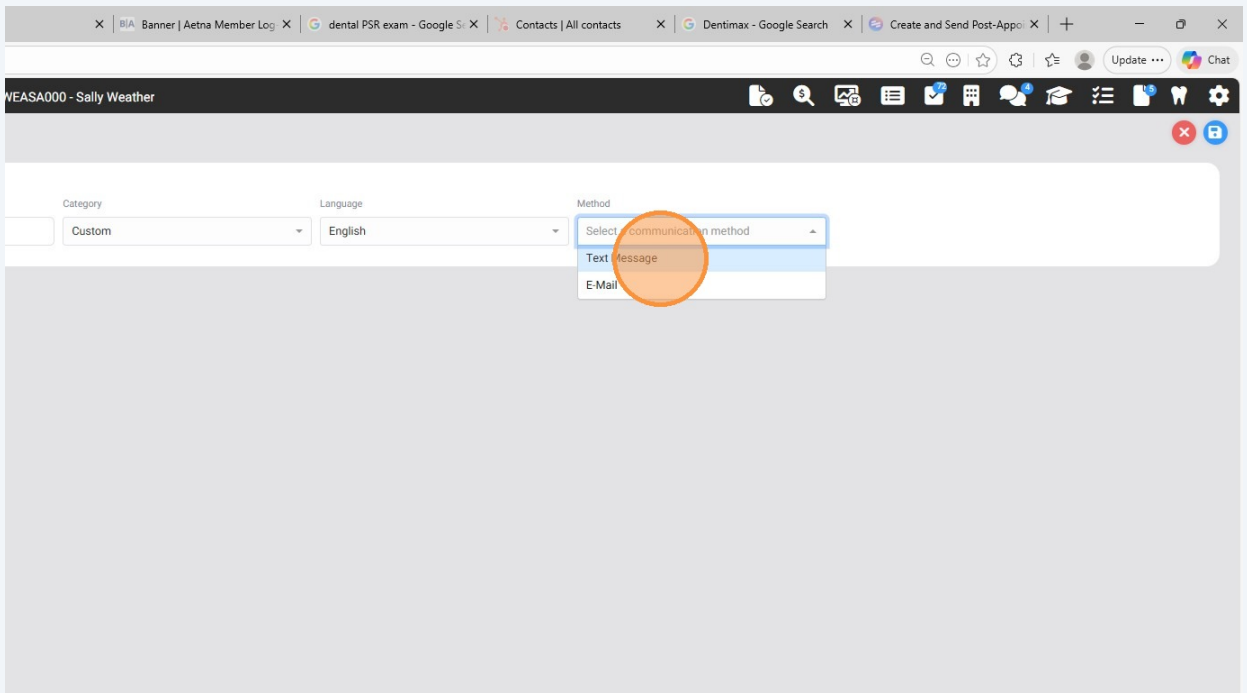
The difference between the two is the options of merge fields that are allowed.



7 Select the category for the necessary template



8 From the dropdown menu under Method select Text Message



9 Click in the Template field to start your message

Custom Template Entry

Template Details

Name: Individual Category: Custom Language: English Method: Text Message

Template

This is a text template to send to patients from |

10 You can use the Blue Merge Field button on the right side to select desired merge field(s)

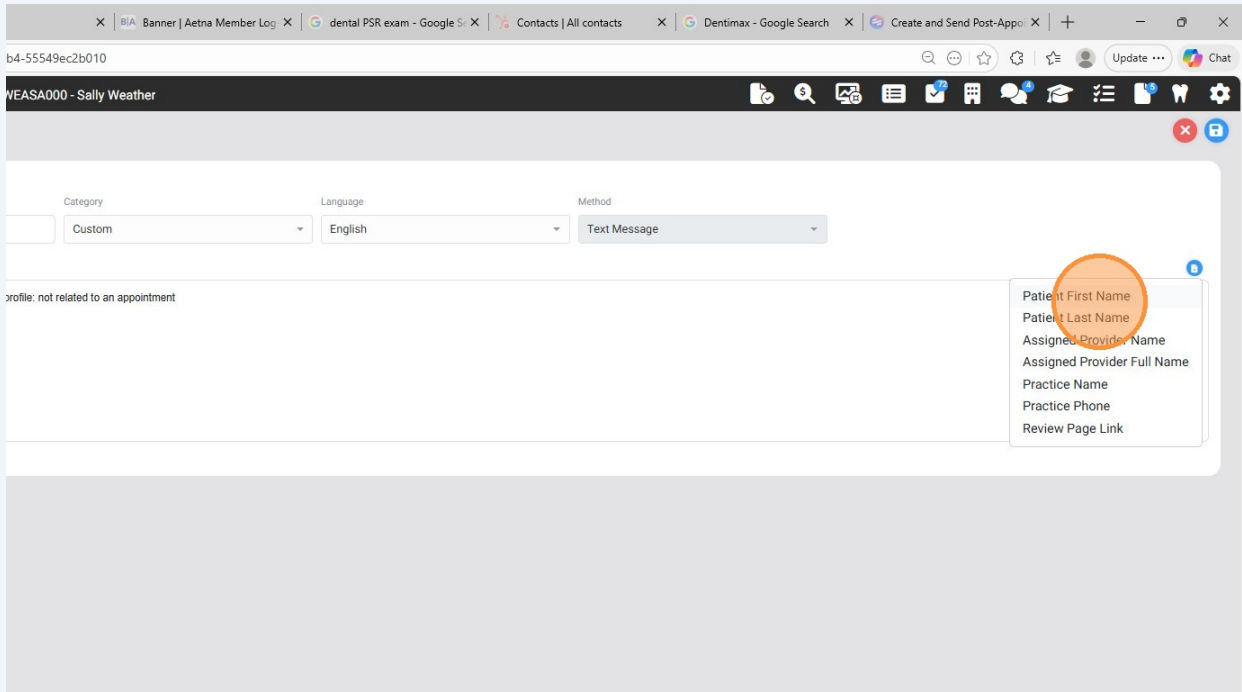
WEASA000 - Sally Weather

Category: Custom Language: English Method: Text Message

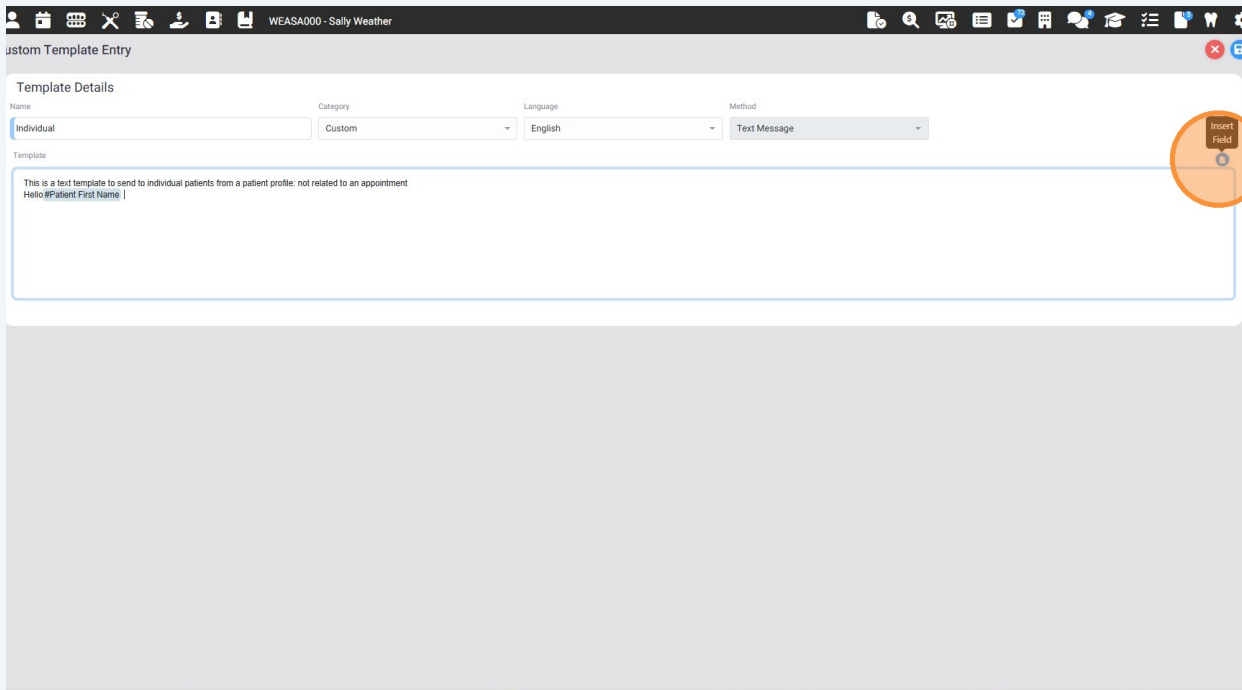
Profile: not related to an appointment

Merge Field

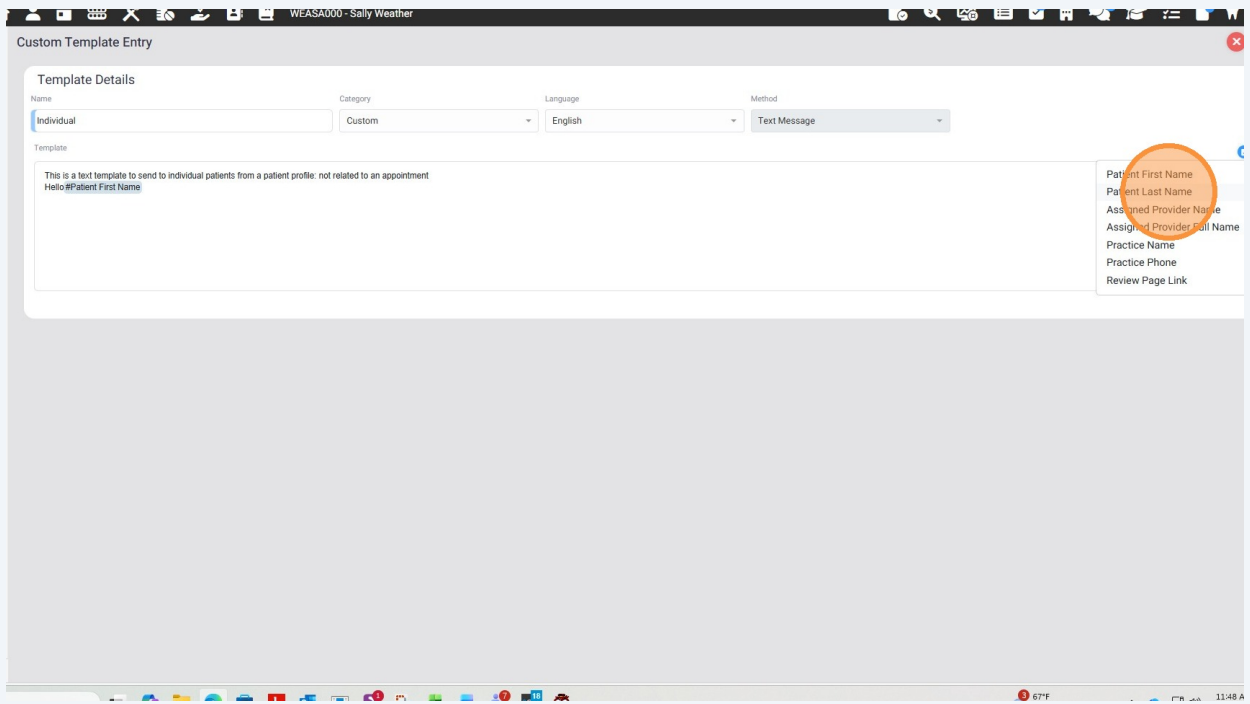
11 From the dropdown, select your merge field



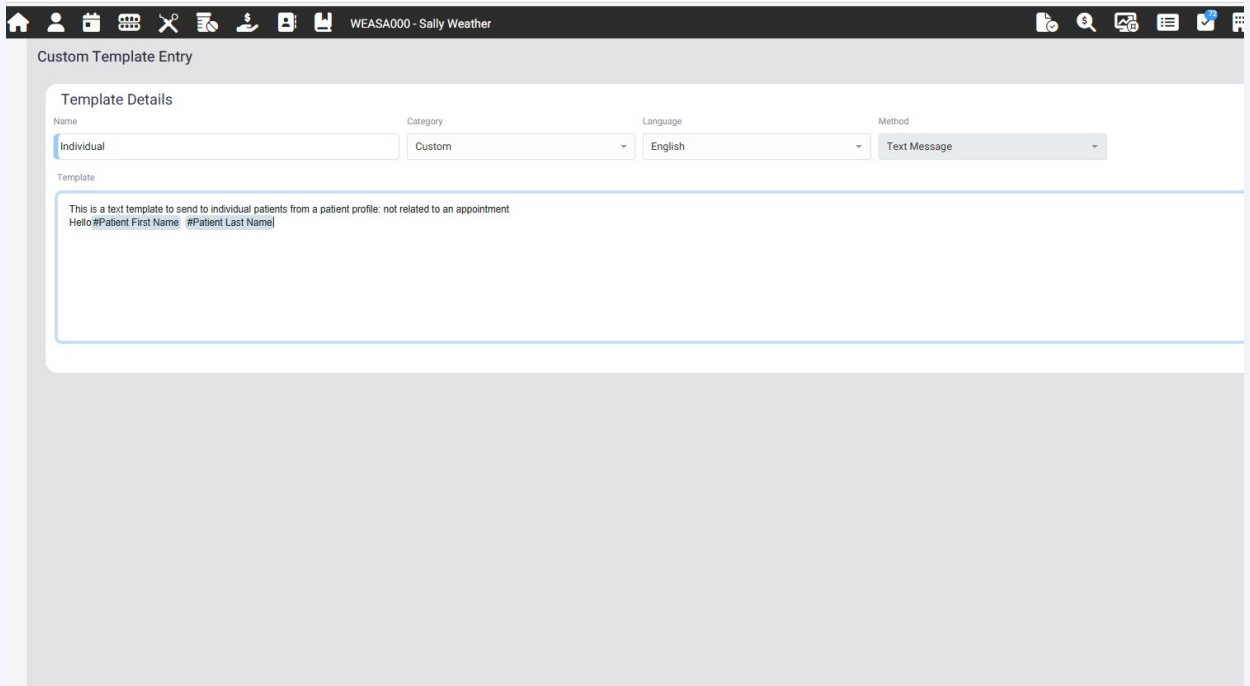
12 This will insert that merge field into your text where you indicate



13 You can add as many of the merge fields that are necessary for your message

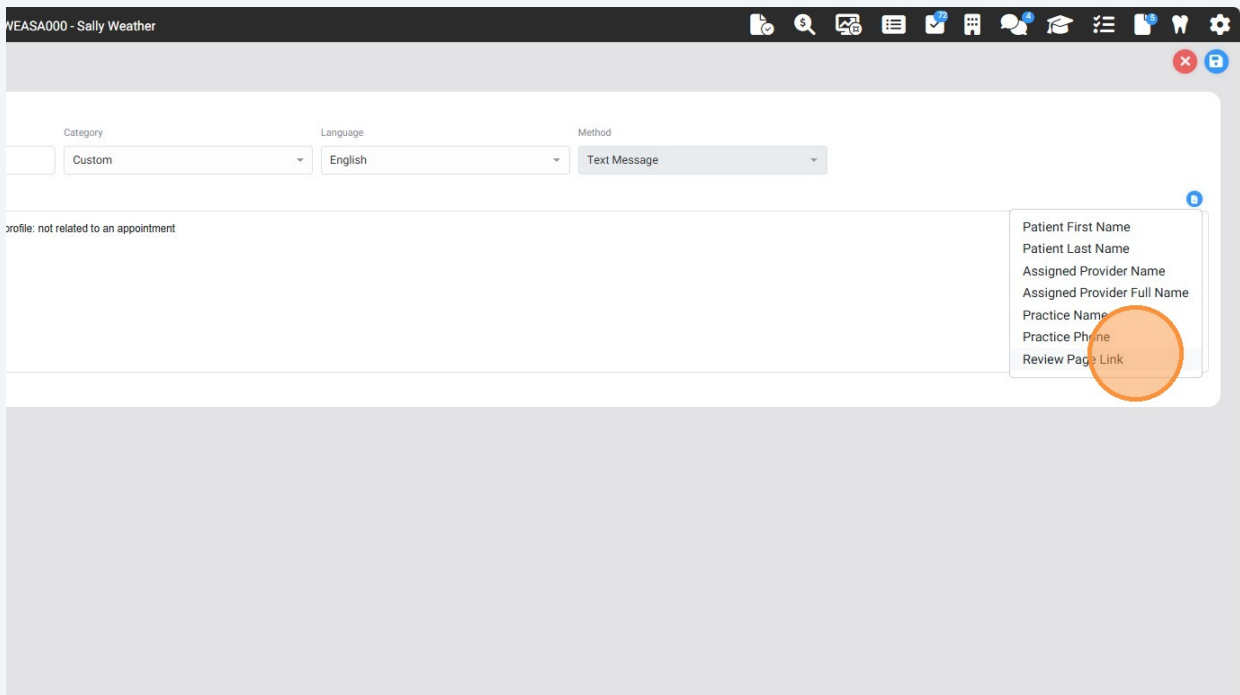


14



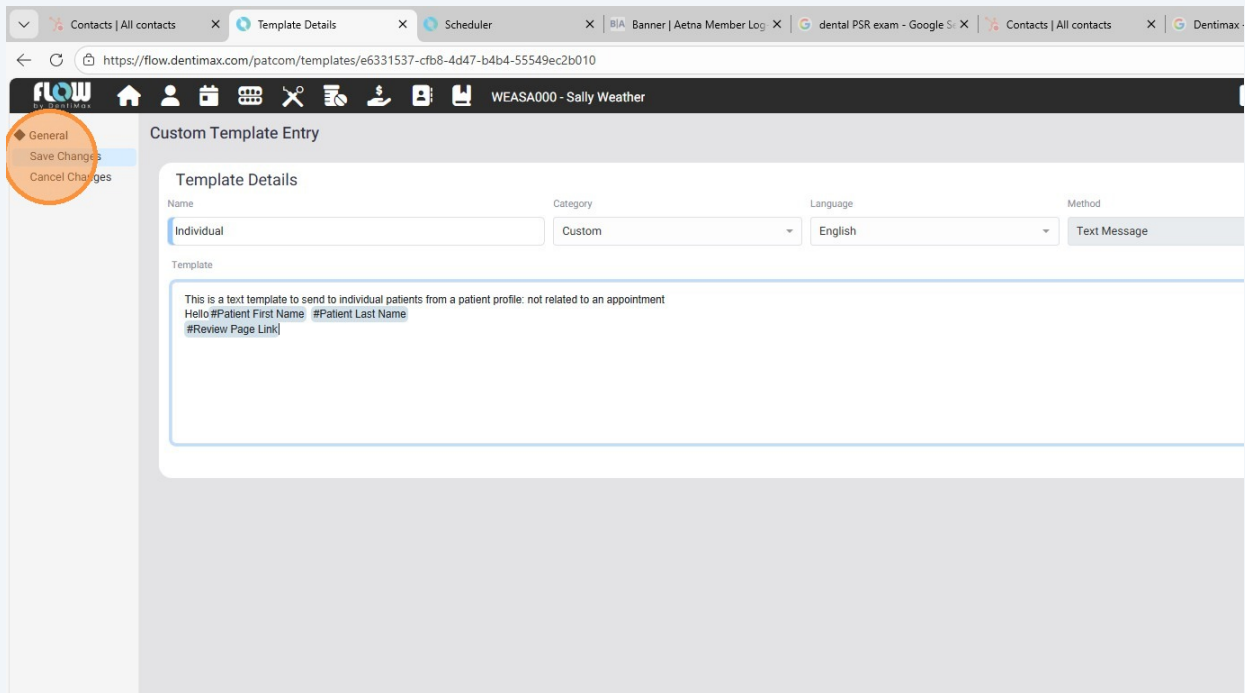
15

If you are wanting to include the link for your reviews, be sure to include the last merge field "Review Page Link"



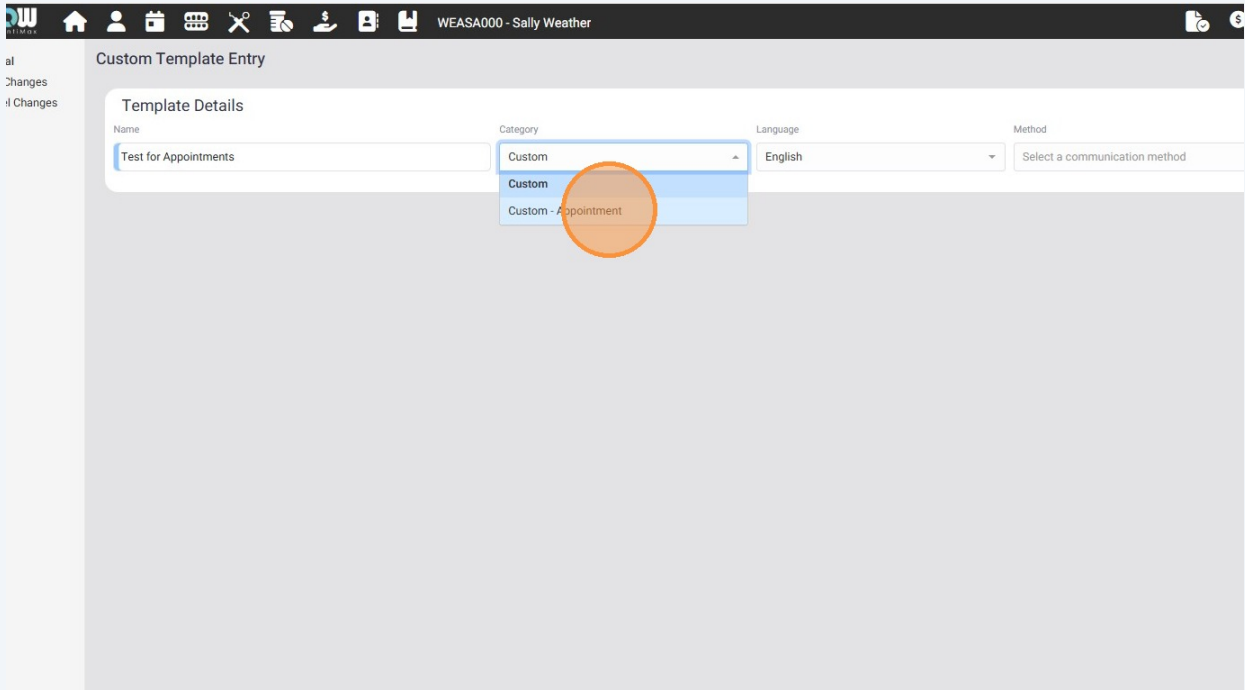
16

Click "Save Changes" once you are done with the message



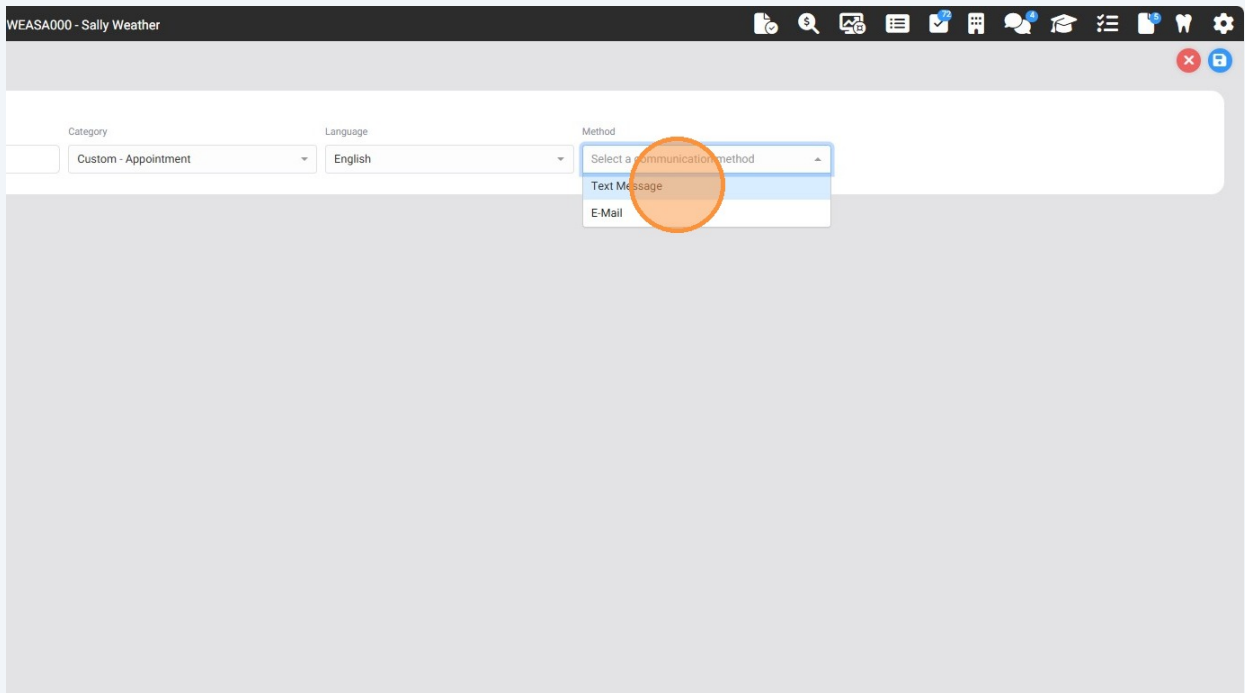
17

To create a template for use on an appointment, you will follow the above steps and select Custom-Appointment as the category



18

Click "Text Message"



19 Start entering your message

https://now.getnima.com/pat/only/templates/create

FLOW WEASA000 - Sally Weather

General
Save Changes
Cancel Changes

Custom Template Entry

Template Details

Name	Category	Language	Method
Test for Appointments	Custom - Appointment	English	Text Message

Template

Start typing your text template...

20 When using the merge fields for the category Custom-Appointment, you will now have options to add appointment details into your message.

Be sure to include the "Review Page Link" if you are requesting a review from your patient

Category Language Method

Custom - Appointment English Text Message

Patient First Name
Patient Last Name
Assigned Provider Name
Assigned Provider Full Name
Practice Name
Practice Phone
Appointment Provider Name
Appointment Day of Week
Appointment Date
Appointment Time
Appointment Resource Code
Appointment Resource Description
Review Page Link

21 Click "Save Changes" when you have finished the message

General
Save Changes
Cancel Changes

WEASA000 - Sally Weather

Custom Template Entry

Template Details

Name	Category	Language	Method
Test for Appointments	Custom - Appointment	English	Text Message

Template

This is for individual text from an APPOINTMENT.
Uses merge fields related to the appointments #Appointment Date #Appointment Time

22 Sending text template from patient profile: Click on the green text bubble

WEASA000 - Sally Weather

Extra Info Missing Teeth

Sally Weather

Contact

Email	Social Media	
Home Phone	Work Phone	Mobile Phone
		8007048494
Street	Street (Cont)	
City	State	Postal Code
Preferred Contact Method	Preferred Scheduling Hours	
Emergency Contact Name	Emergency Phone	Emergency Phone 2

Appointments

Date & Time	Provider	Resource
3/10/26, 10:00 AM	David Arquette	Dr. Amani

Sally has no missed appointments.

Alerts

Insert alerts here ...

Notes

Insert notes here ...

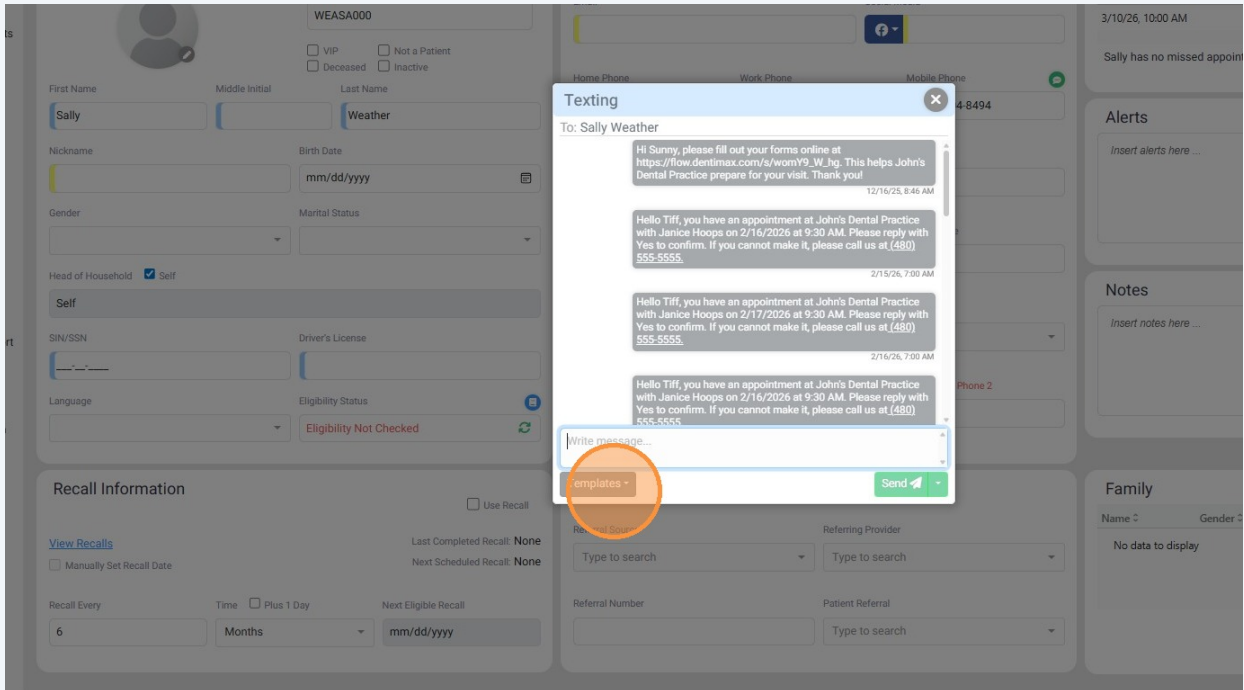
Referral Information

Referral Source	Referring Provider
Time to search	Time to search

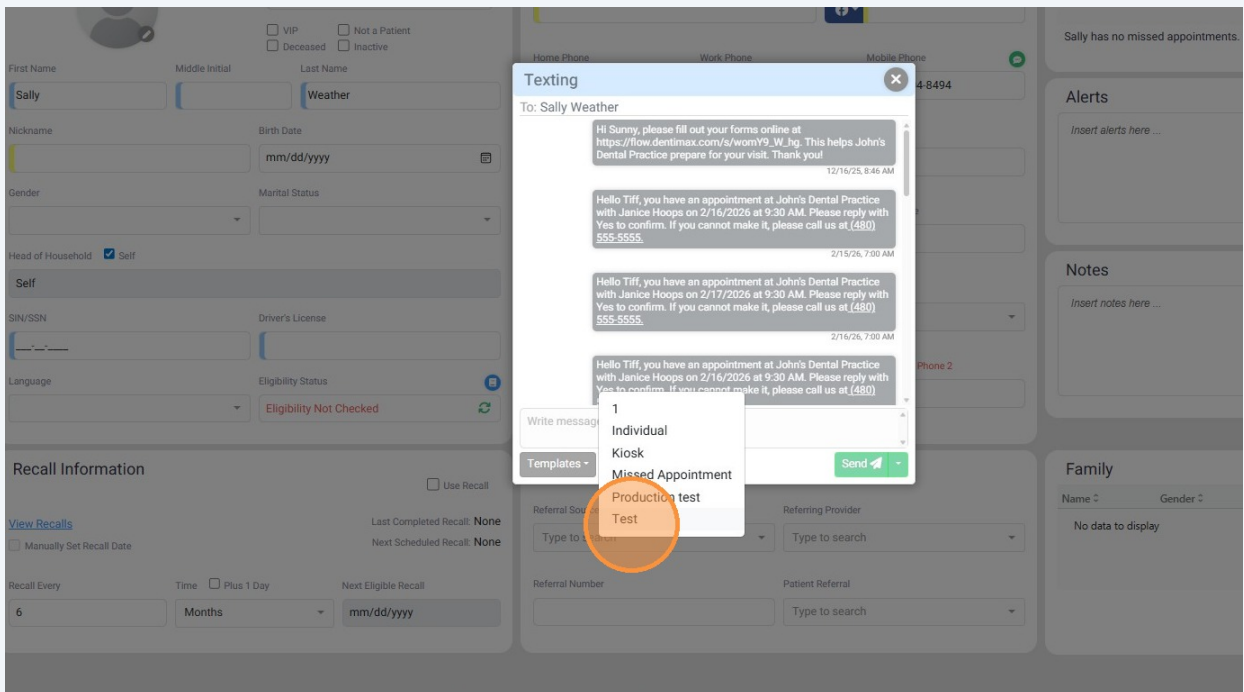
Family

Name	Gender	Birth Date	Next Appointment
No data to display			

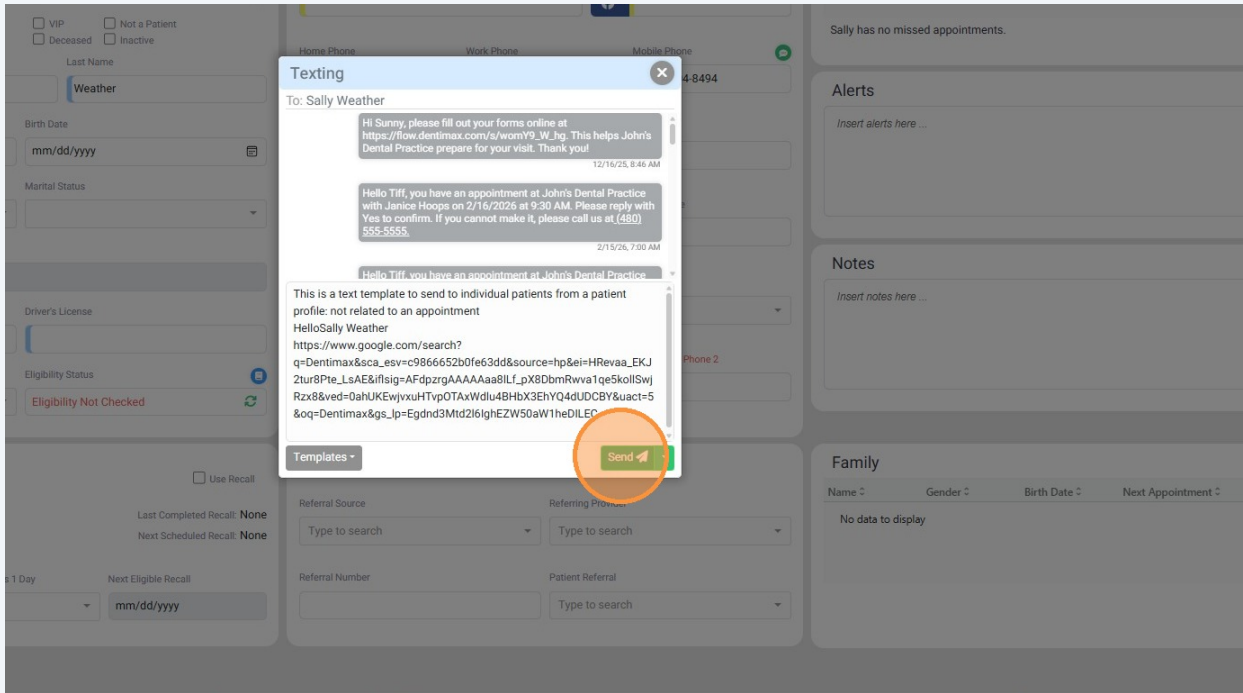
23 Click "Templates"



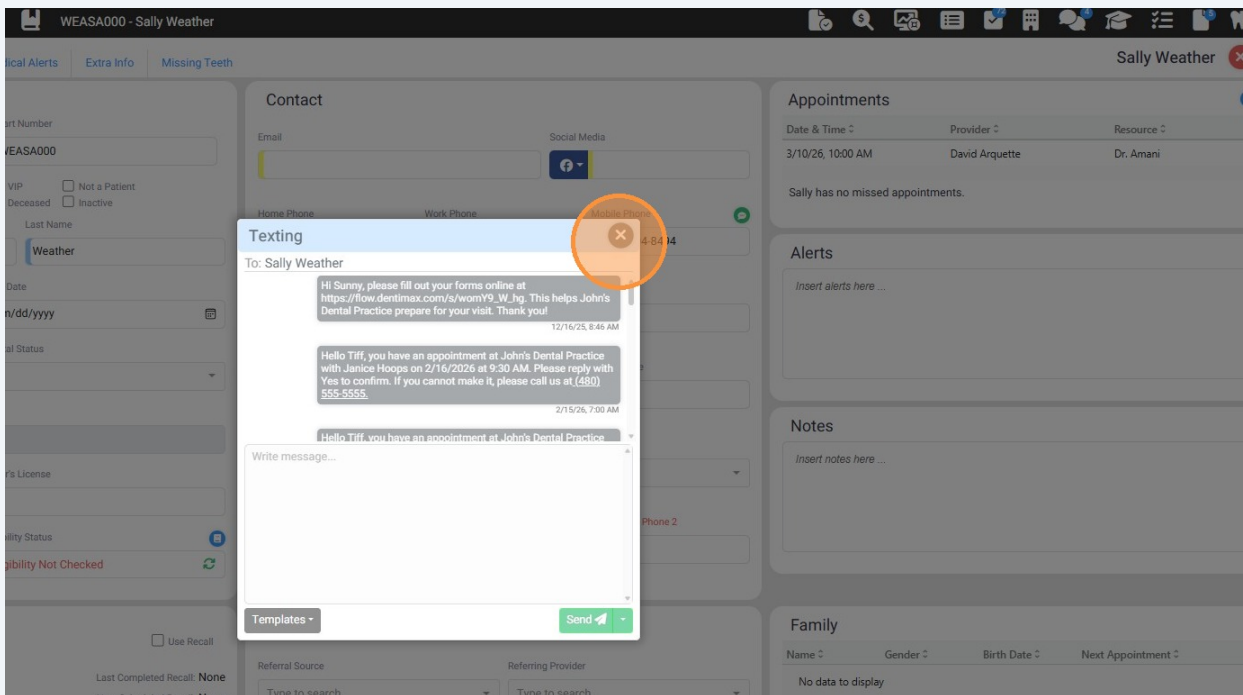
24 Any Templates under category "Custom" will be available to use from the patient profile



25 Select the Template and hit send

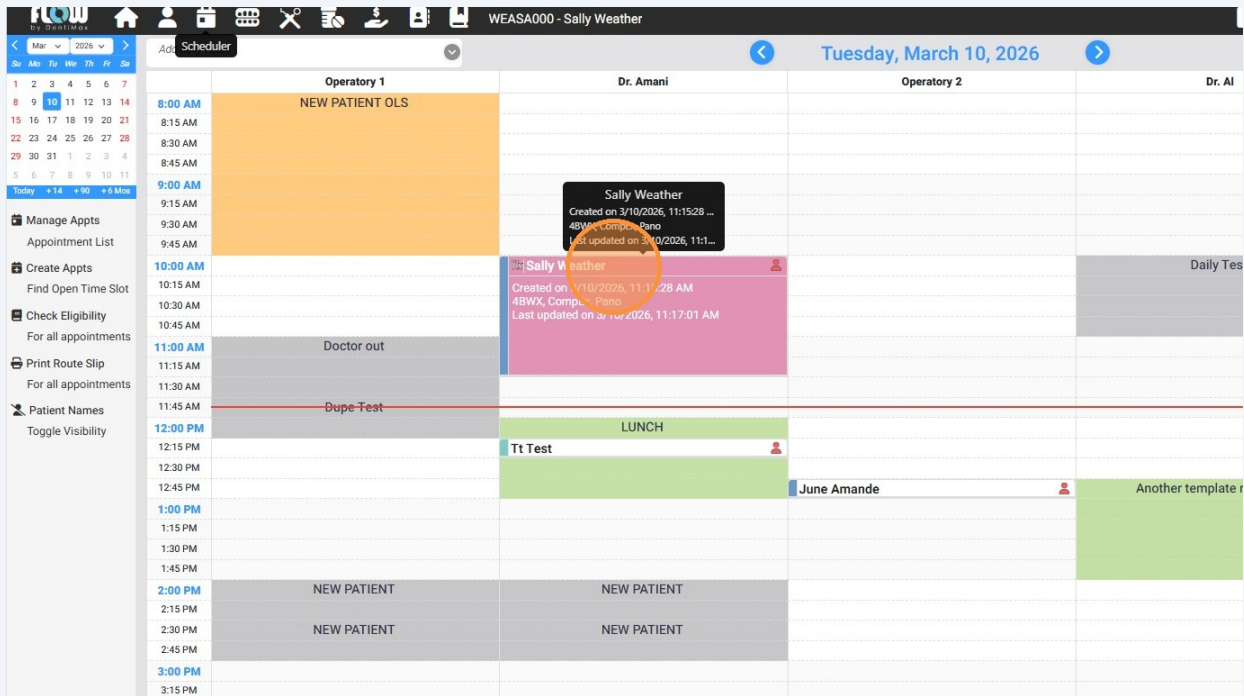


26 Click "Close"



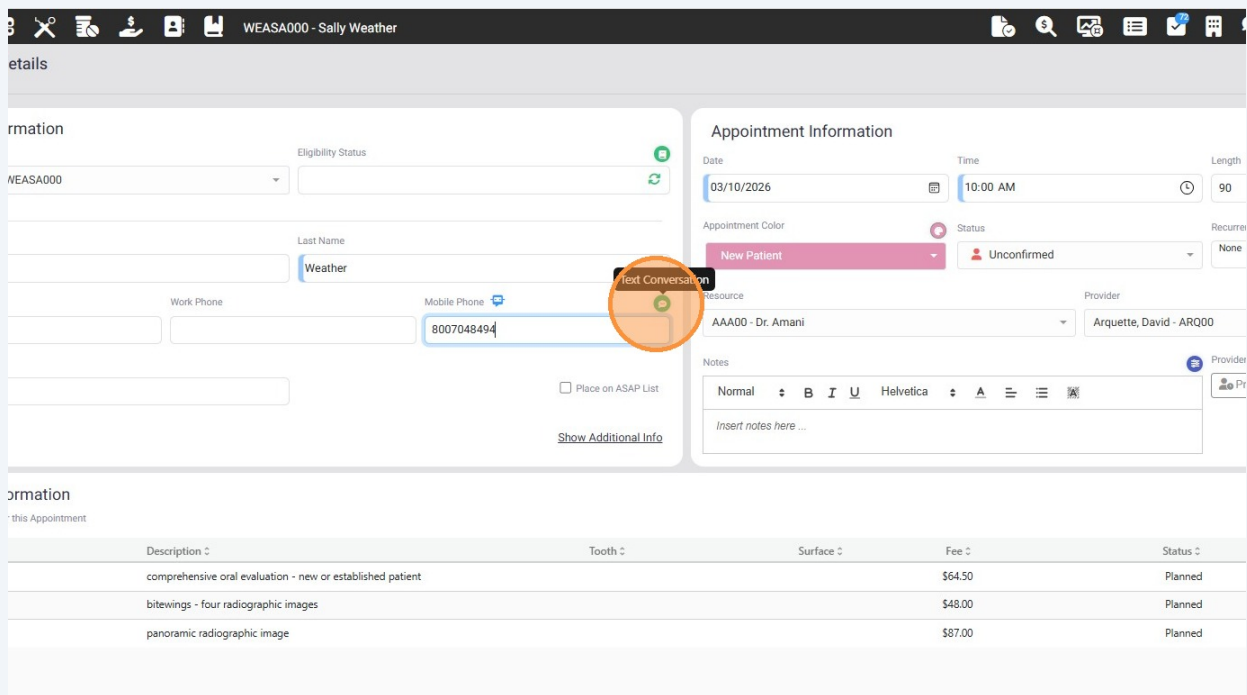
27

If you are wanting to send a text from a patients appointment; click appointment to open



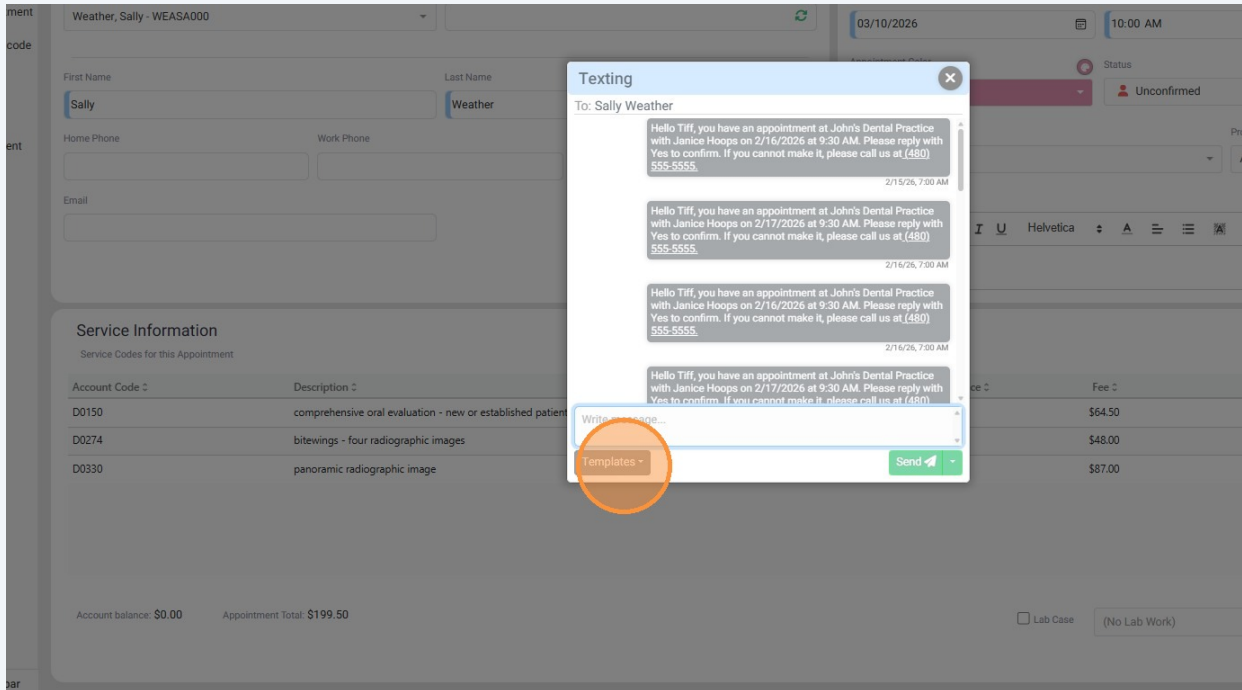
28

Select the green Text bubble



29

Click "Templates" and now you will have the list of Custom-Appointment templates available to use



30

Select desired template and hit send

