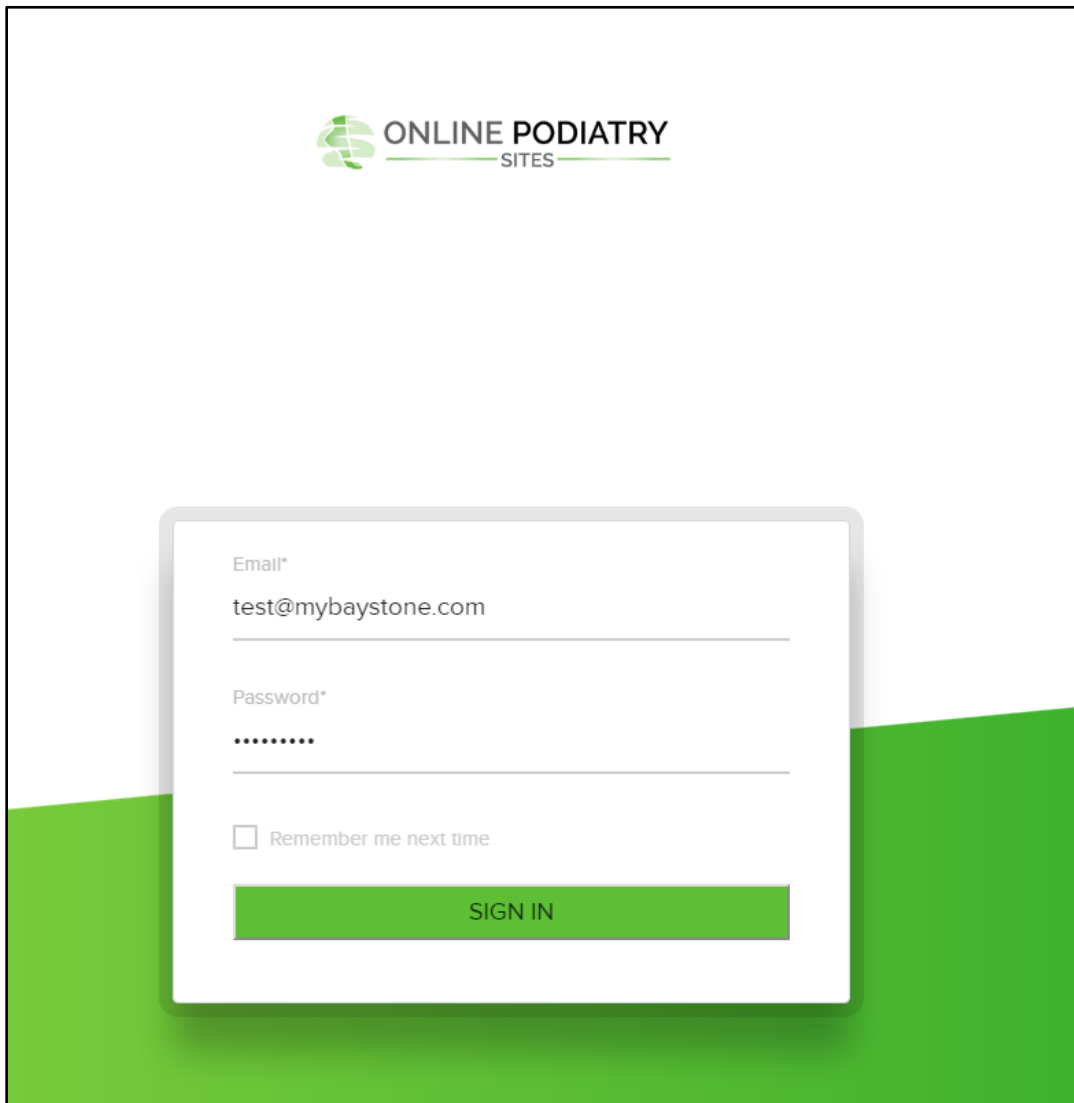# E-Communications Guide

The first thing that you will do to access your account is to login. You can login to portal.theonlinepractice.com. You can also log into portal.onlinechiro.com or portal.onlinepodiatrysites.com. Click **Sign In** once you have entered in your email and password associated with your account.

Navigate **to Patient Communication**: Newsletters, Cards, Contacts.
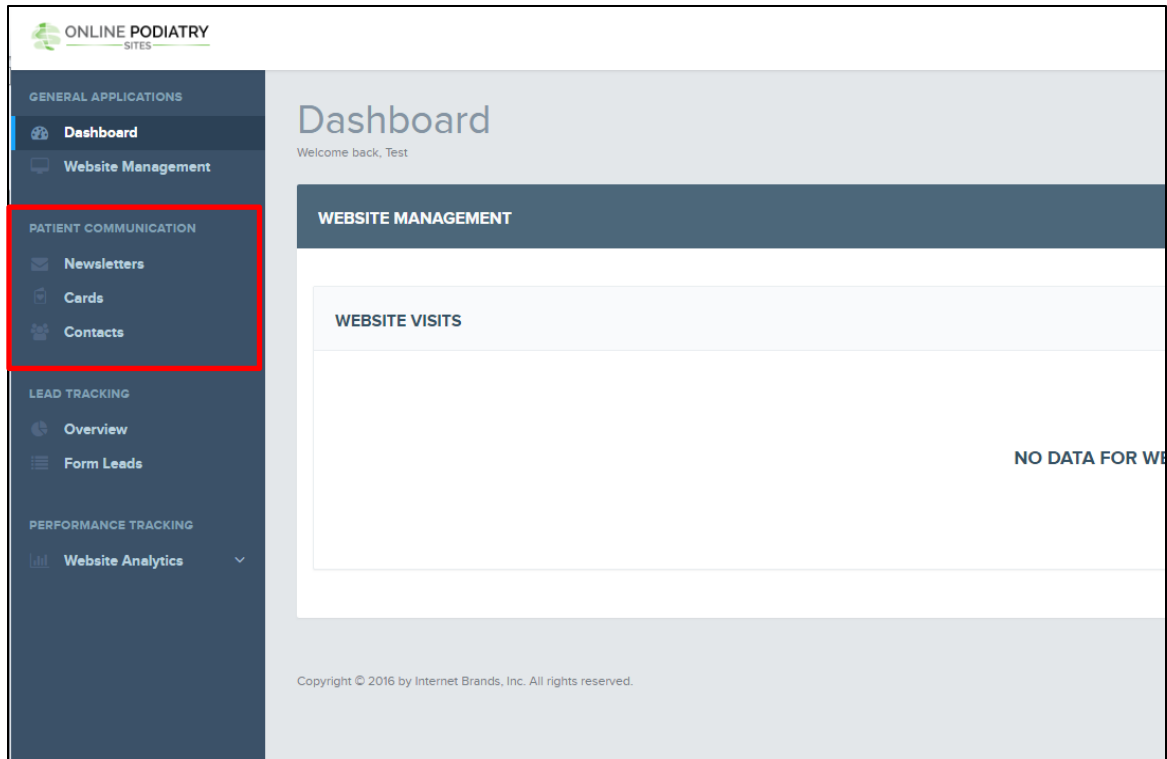
Contacts

To utilize the E-Communication Suite, you first need to upload your patients' contact information to the Address Book within your account.

Multiple Contacts

1. If you do not already have one formed, create an Excel spreadsheet with your patients' email, first name, last name, birthdate (used for birthday greetings), middle name, home phone, work phone, cell phone.
   a. Email, first name, and last name are required – the other fields are optional
   b. Include column headers (see below for example)

▲	A	B	C	D	E	F	G	H	
1	Email	First Name	Last Name	Birthdate	Middle Name	Home Phone	Work Phone	Cell Phone	
2	john.smith@gmail.com	John	Smith	10/28/1982	Stanley	(123) 234-7890	(234) 682-2839	(345) 528-2349	
3	sfoster+myemail@hotmail.com	Sarah	Foster	2/13/1945	Julia	(123) 234-7890	(234) 682-2839	(345) 528-2349	
4									
5									
6									
7									
8									
9									

2. Save this spreadsheet as a "**CSV** (comma delimited) file under the dropdown box in the "Save As" window

3. At the top of this window, you will see a **+Add New** button where you can select your .csv file and upload your Address Book.

4. Click **browse**
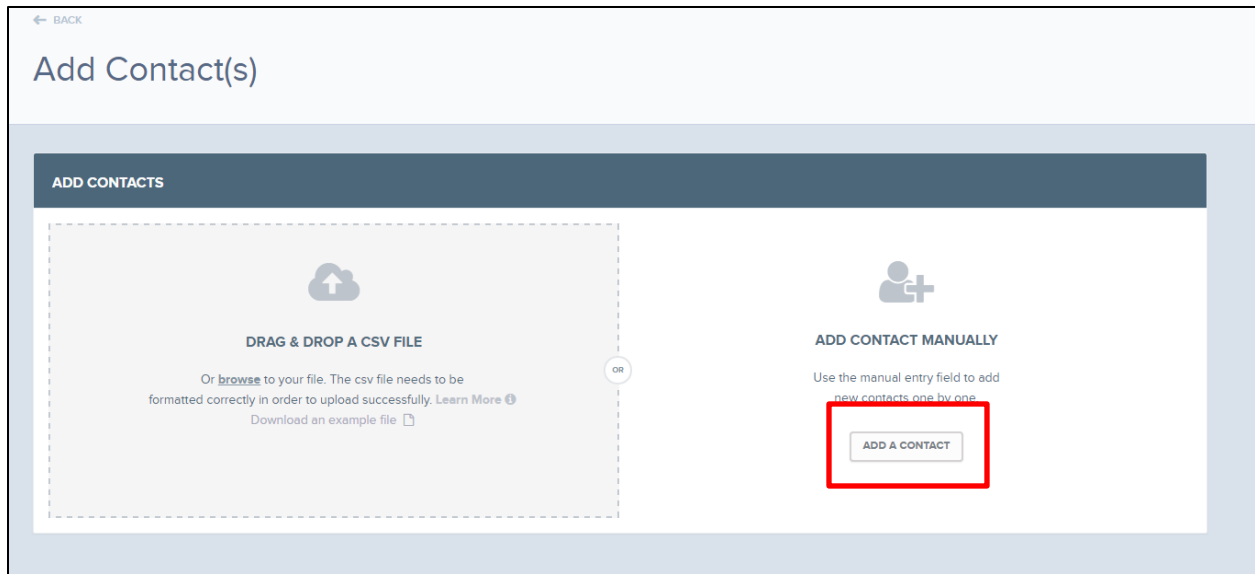
5. Select the file on your computer
6. Click **open**
7. Congrats! Your upload is complete

Manual (one-by-one) Contacts

1. Click **Add A Contact**
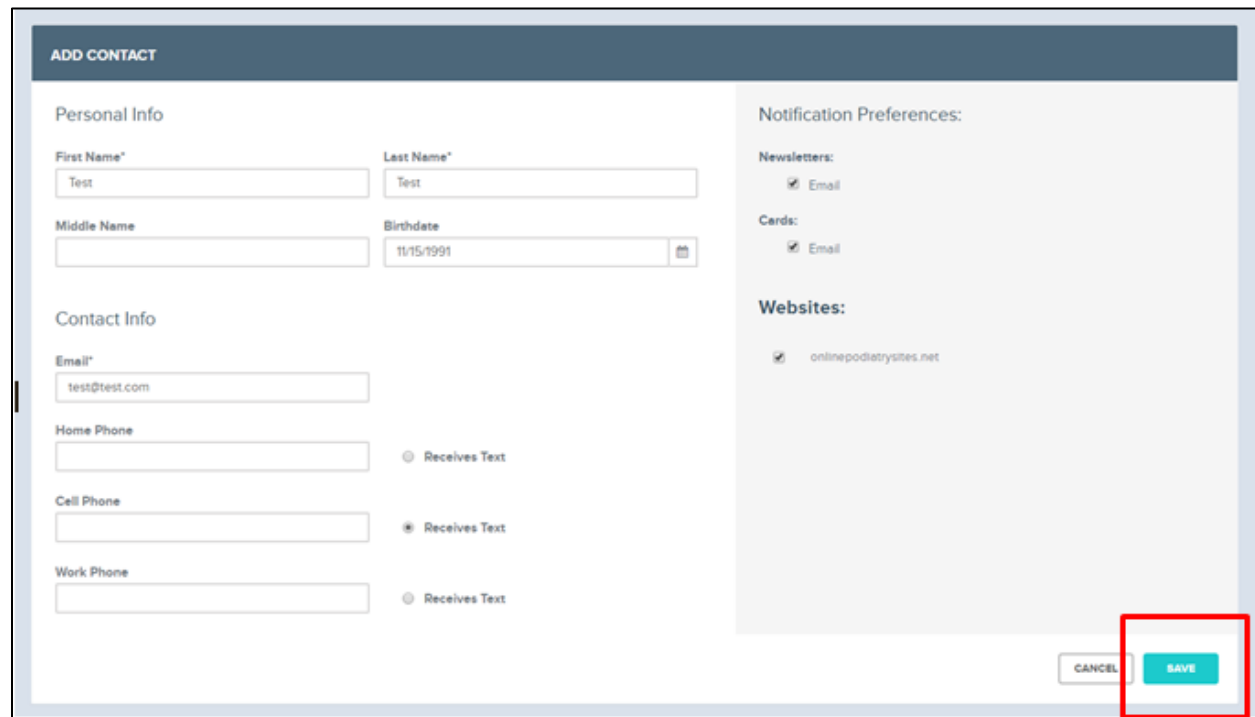
2. Type in the patient's information, and indicate which emails you'd like them to receive and the check the box next to your website on the right hand side.
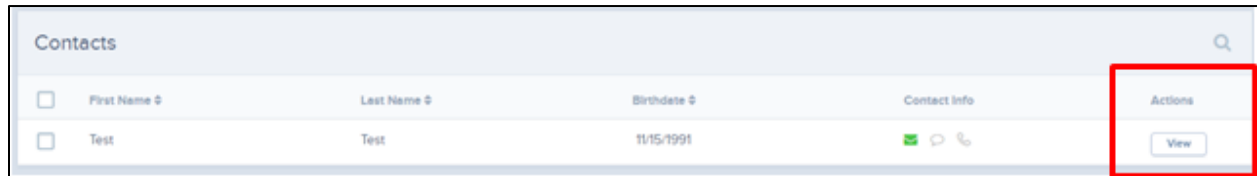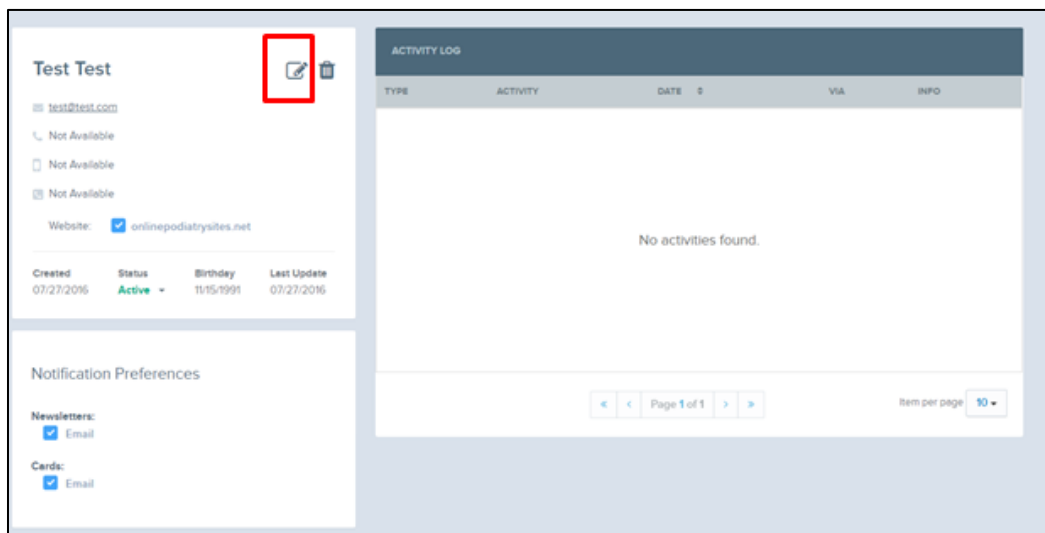3. Click **Save**

Editing a Contact

1. To view your contact list at any time, you can always click **Contacts** on the left hand side of the page
2. Click **View**
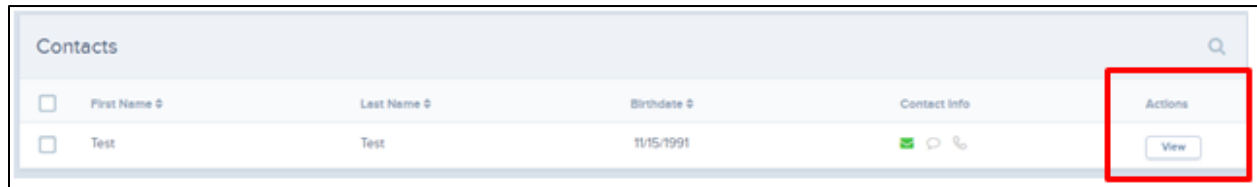

3. Click the pencil icon
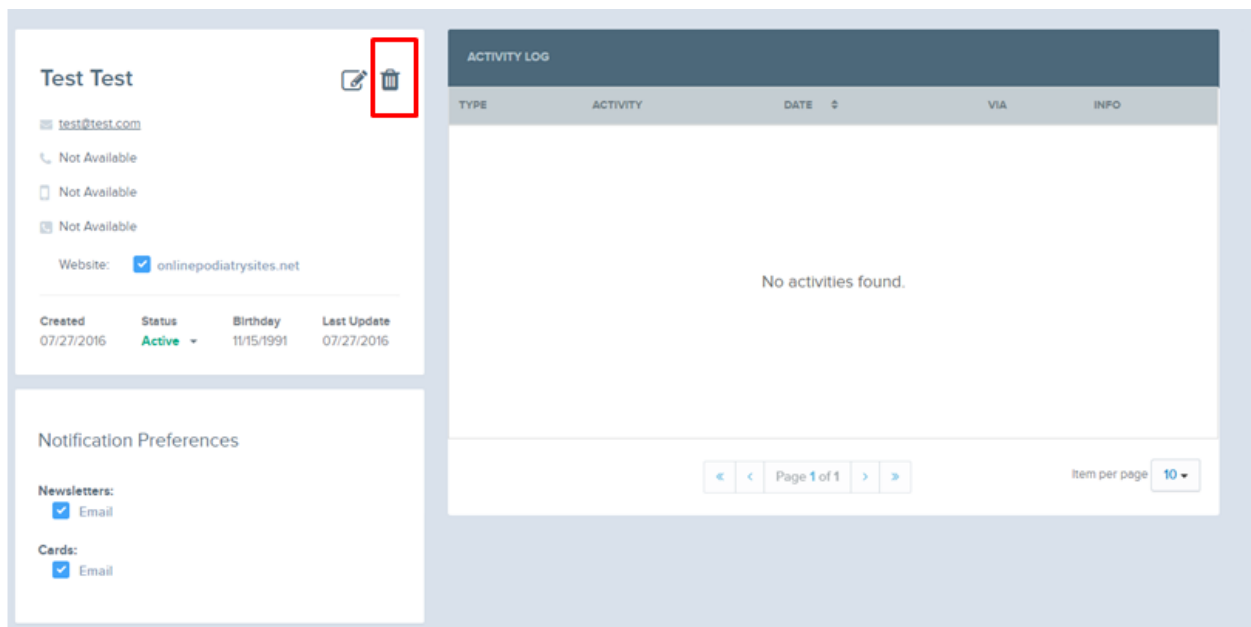

4. Make edits
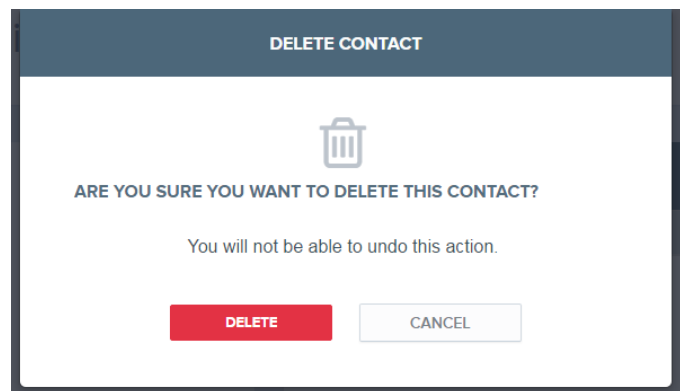5. Click **Save**

Deleting a Contact

1. To view your contact list at any time, you can always click **Contacts** on the left hand side of the page
2. Click **View**

3. Click the trash can icon

4. Confirm Deletion

Cards

Cards can either be sent out to your entire contact list or to an individual contact. These are a great way to keep in touch with patients and to send a personal message. There are a few different card options that you can schedule and send, and you are also able to customize them!
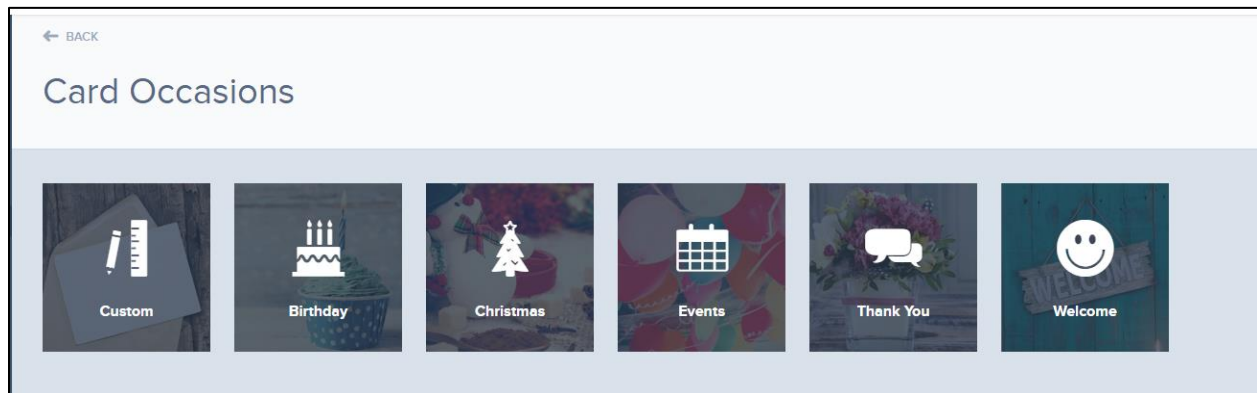
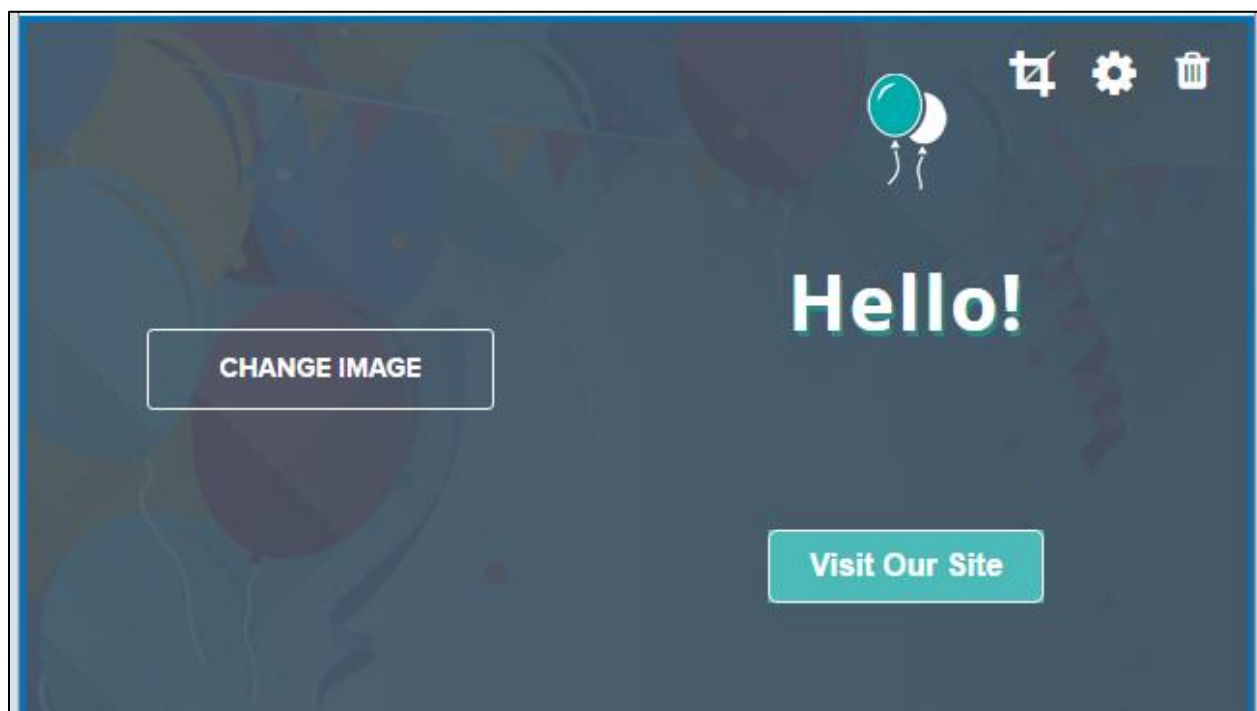Click on **Cards** on the right hand side of the page
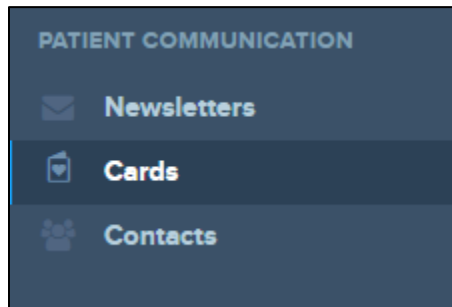
Click **Create Card**
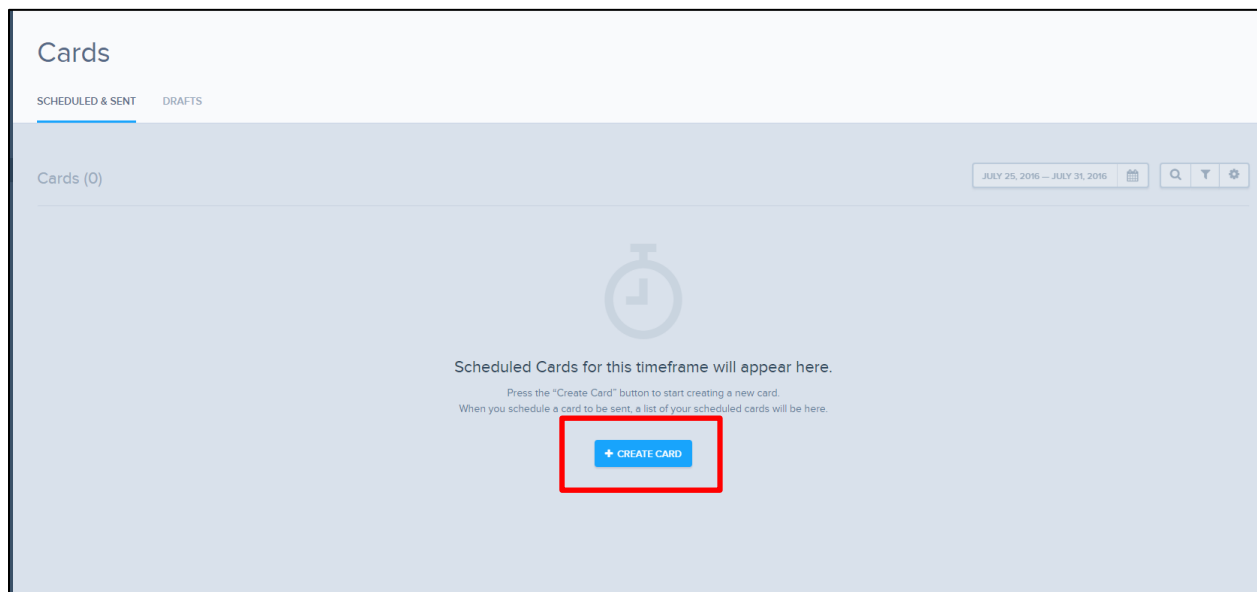
Select the card occasion (welcome was chosen for this manual)

Hover your mouse over the element that you would like to edit. It will give you the option to edit or delete the element.
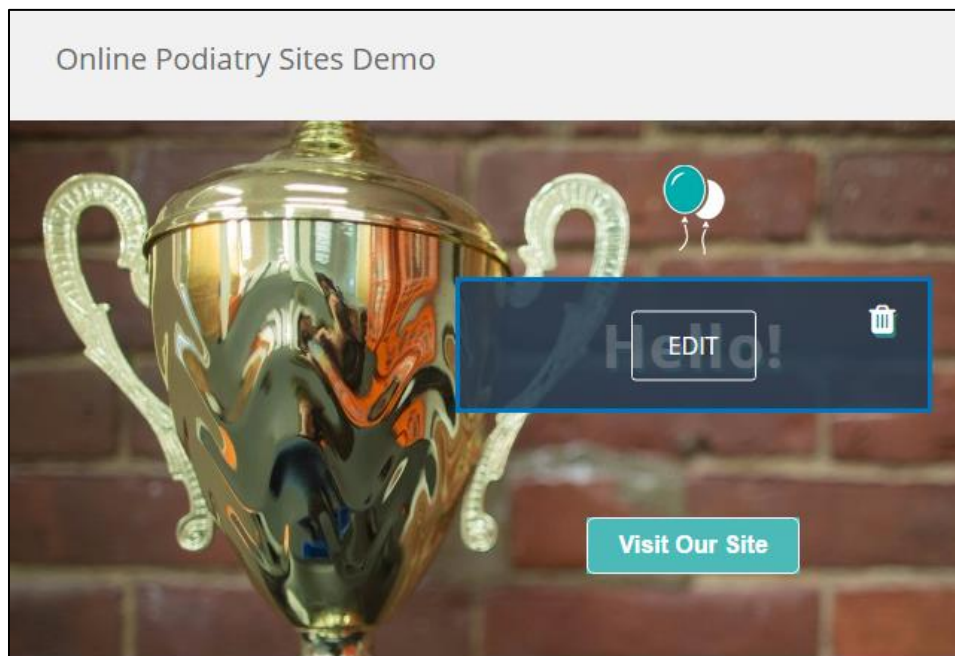

Clicking **Change Image** will allow you to upload a photo to the header of the card. If you do not choose one, you can delete the image, or you can use the one that is preloaded to the card.

If you upload a picture and it is too large, use the cropping option in the upper right hand corner to adjust your photo.
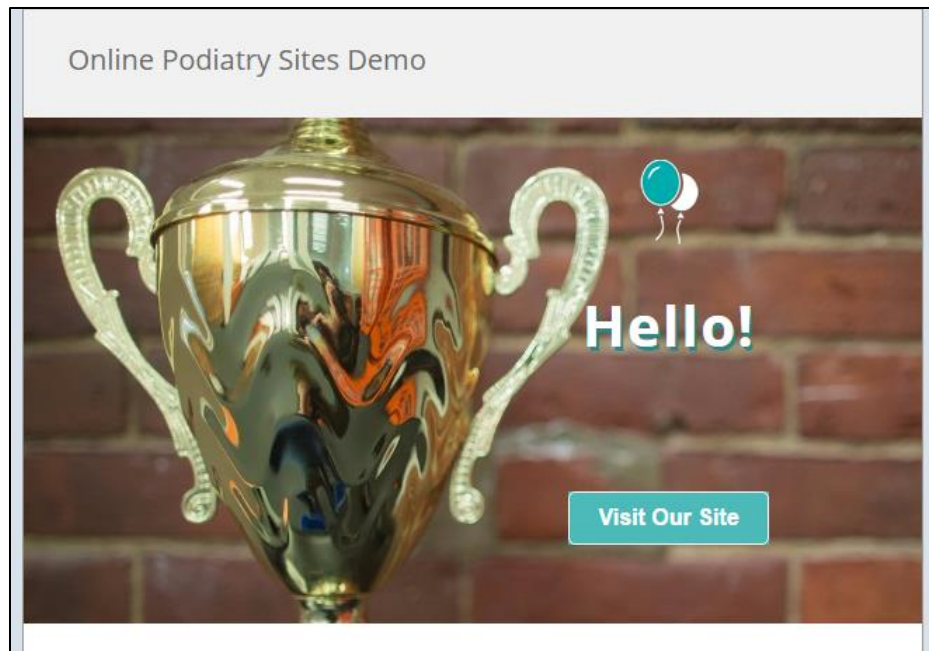
Hover over the text in the photo, enter in your desired text, and click save.

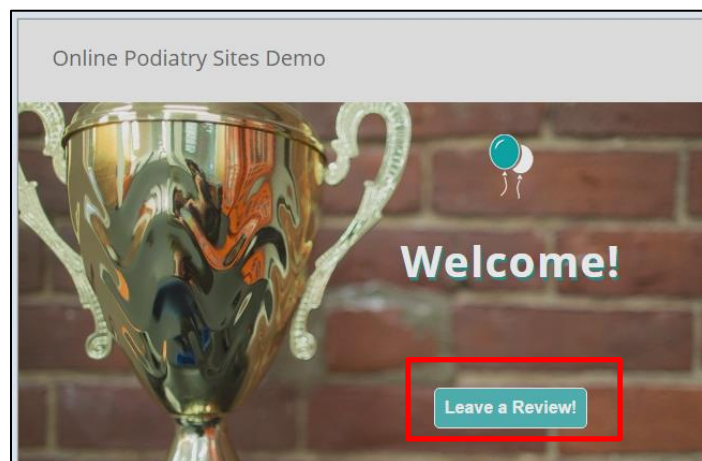To edit the button, hover over the button, click edit, make your desired changes, and click save.
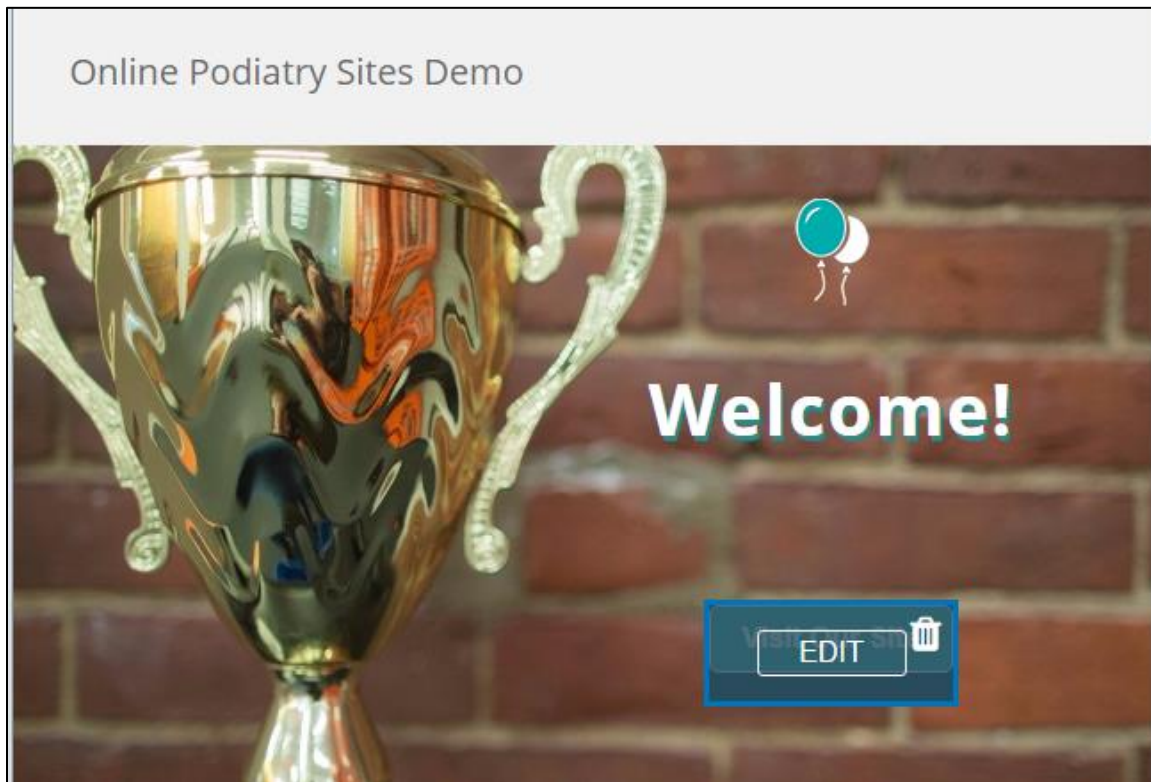
To edit text, hover over the text in the card, make any changes, and click save.
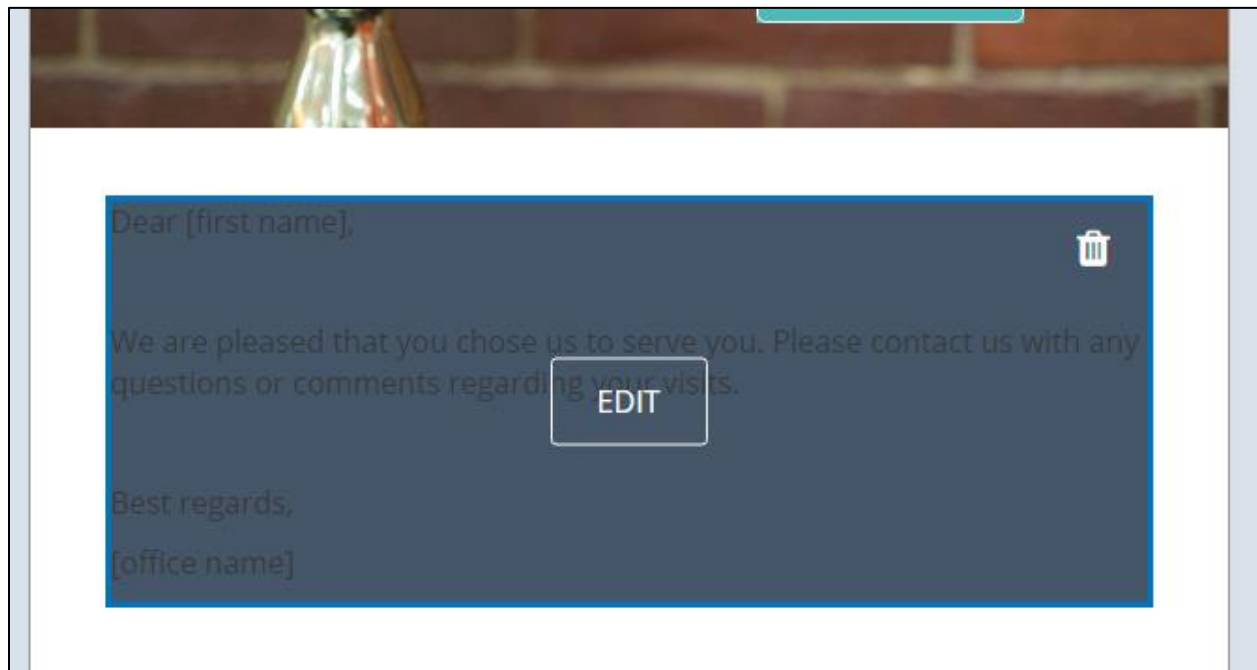
Dear [first name],

We are pleased that you chose us to serve you. Please contact us with any questions or comments regarding your visits.

EDIT

Best regards,

[office name]

Edit Card Message

¶ | B | *I* | U | ≡ | ⌐⌐ | ☰ | ☰ | ☰ | ☰ | <>

Dear [first name],

We are pleased that you chose us to serve you. Please contact us with any questions or comments regarding your visits. If you'd like to leave us a review, please do!

Best regards,

[office name]

CANCEL   SAVE

When you are satisfied with your card, you can now send it to your patients. On the right hand side of the screen you will see the options for sending.

You can have the card send immediately, save the card as a draft, or schedule it to go out on a specific day. If you would like a card to go out at the same time every week or day, you can always select "**Repeat**" and select when you'd like it to go out

Email subject line is what the patient will see when the email is sent to them. Make sure this is filled out!

Recipients-- where you can choose the patients that will be receiving the email. You can select **"All Contacts Lists"** and the card will be sent to your entire list, or you can select **"Custom"** if you'd like to select the patients one-by-one.

When clicking custom, it will bring you to your contact list where you can select the desired recipients. The blue checkmark on the left hand side of the page indicates the recipient that will receive the email.
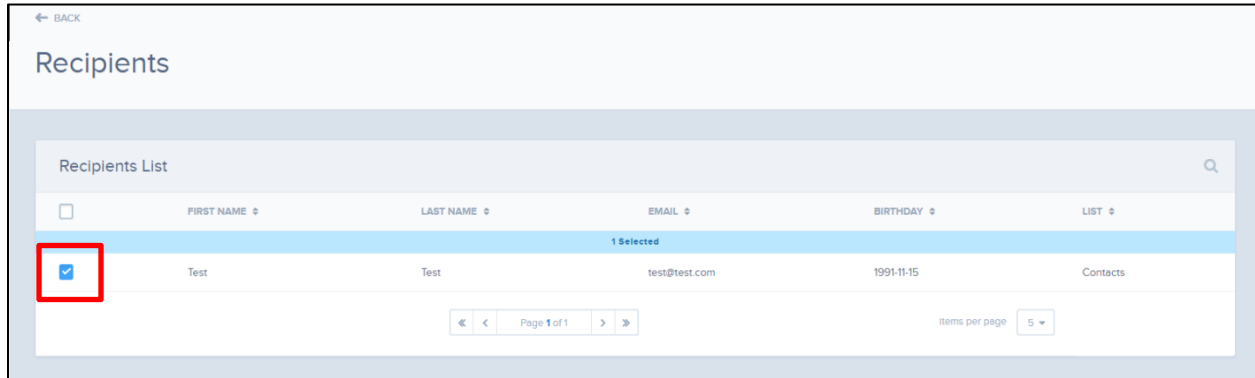
Once you are done selecting your contacts, select **"Done"** in the lower left hand corner of the screen.
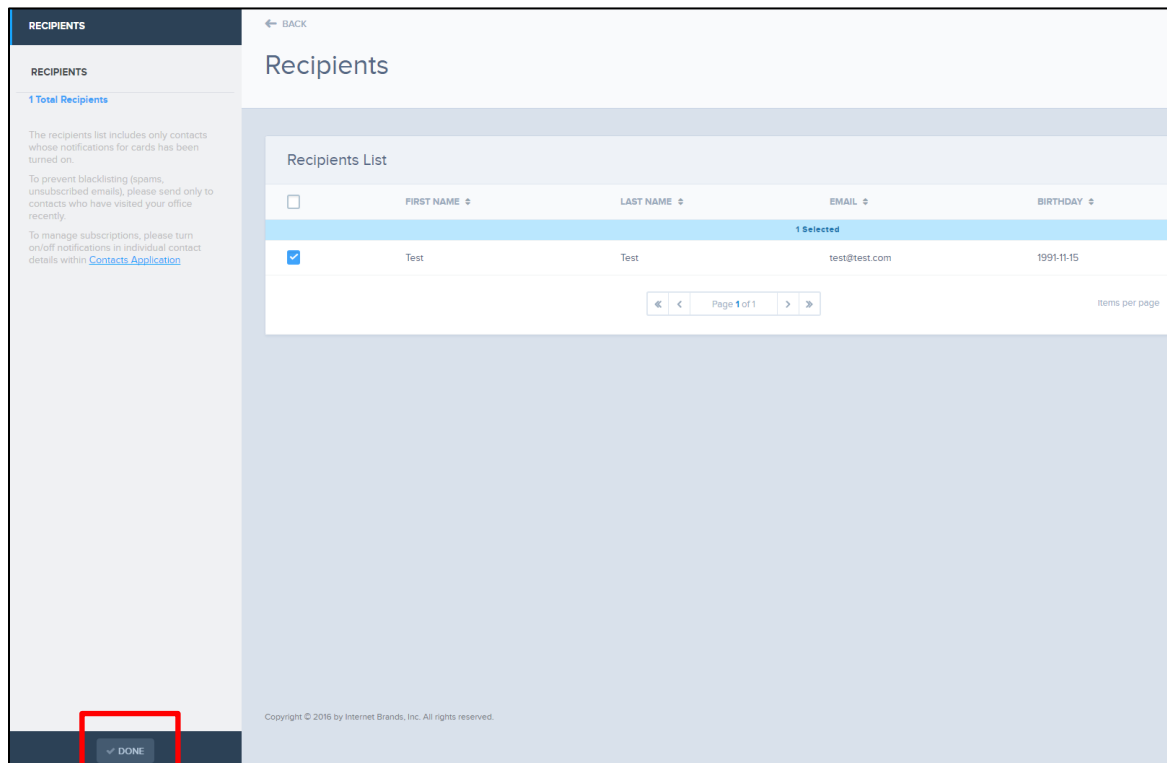
Once you have your send date, subject line, and recipients chosen, click "Save" in the lower left hand corner, and your settings for your card will be updated.
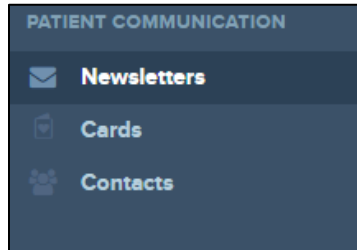

When you click save, you will be brought back to the cards home screen. Here you will be able to either add another card by clicking **+Add New** in the upper right hand corner, or you can view and edit any scheduled or sent cards.
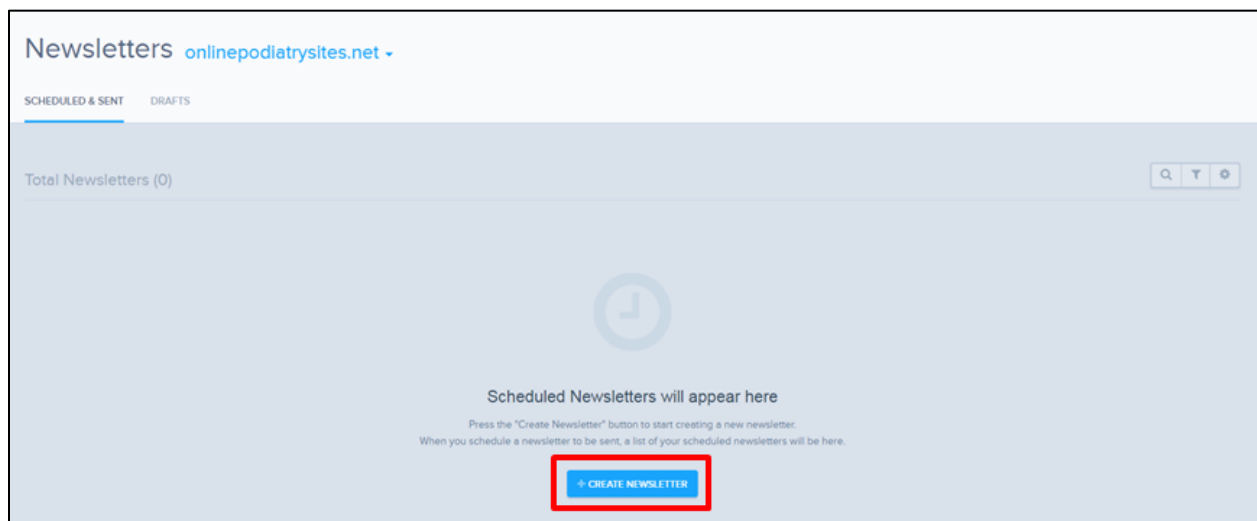
Newsletters

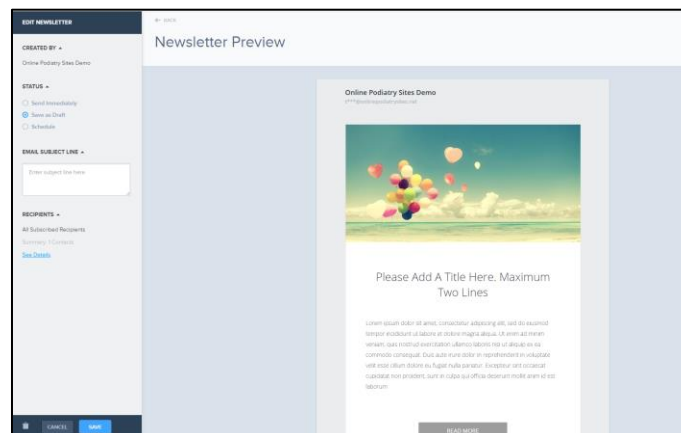Newsletters are great to send out to your entire contact list.

Click on **Newsletters** on the right hand side of the page

Click **Create Newsletter**

Editing a newsletter is identical to that of editing a card. Hover over the picture, text, or button and click **Edit.** Be sure to save any changes that you make!

Need help?

You can always give our Rockin' Web Support a call at **888-932-5560**, email support@onlinepracticemail.com (include your domain name so we can link up your email to your account), or you can **Submit a Support Ticket**.

When you are logged in, click   👤 SUPPORT   in the upper right hand corner of the screen.

Fill out the form with any questions, comments, concerns, and click **Send.** This request will be sent off to our Rockin' Web Support and we will either complete your request, or reach out to you.

Besides submitting requests for your website, you can also refer a friend through the support ticket section. With our Refer a Colleague Program if you refer a colleague, you will get **a free month of hosting** if they sign up with us. This is where you can enter in their name and contact information, and our sales team will reach out to them.