

Campaigns

Campaigns consist of a series of templates that can be emailed, texted or conveyed by phone to a Lead or existing Patient based on your preferred schedule. This new feature allows clinics to actively engage patients with interesting information or educate them about their choice for Chiropractic care. In addition, this feature streamlines this important process, to just a few clicks each day.

To begin the process we have to setup Templates in Atlas. Templates can be setup for Email, SMS (text message) or scripts to be used in a phone conversation.

In our example, we will setup a Campaign to help educate New Patients with information during their first 2 weeks of care.

Setup > Templates

In Templates you can choose to create an Email or Messaging Template or a Phone Call Template.

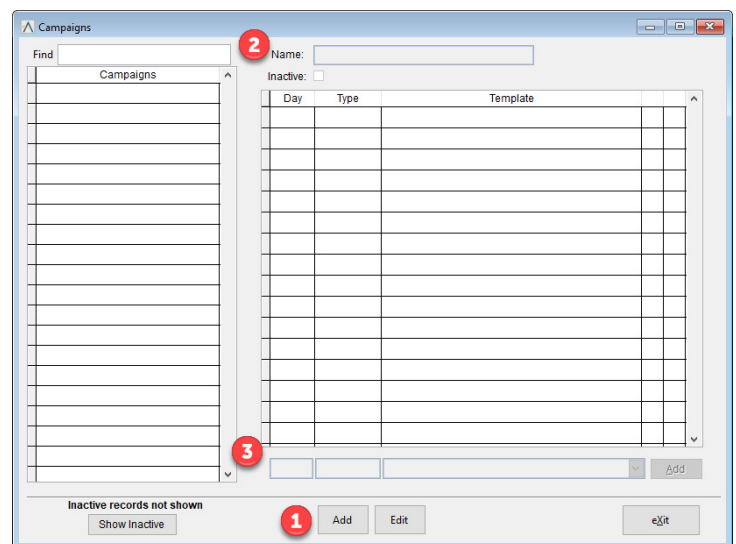
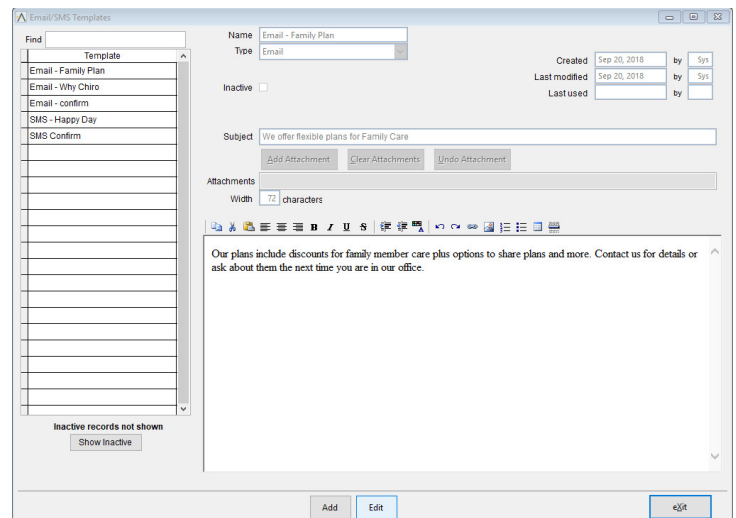
- **Email or Messaging:** templates created to send via email or text message here is a short refresher on setting up email templates:
<https://bit.ly/2Nu490M>
the same method applies for SMS templates except there is no Subject line and you are more limited in the length of the message text
- **Phone:** templates created that will display a script to follow during a phone call

In the example window you will note we have created two Email templates (Family Plan and Why Chiro) as well as an SMS template (Happy Day) to use in our campaign.

After creating your templates it's time to create the campaign schedule.

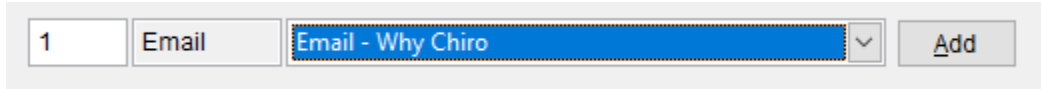
Setup > Campaigns

Multiple campaign series can be created allowing you to apply different courses to different types of Patients (example: create a campaign for Potential Patients – Leads and another for New Patients actively engaged in the office)



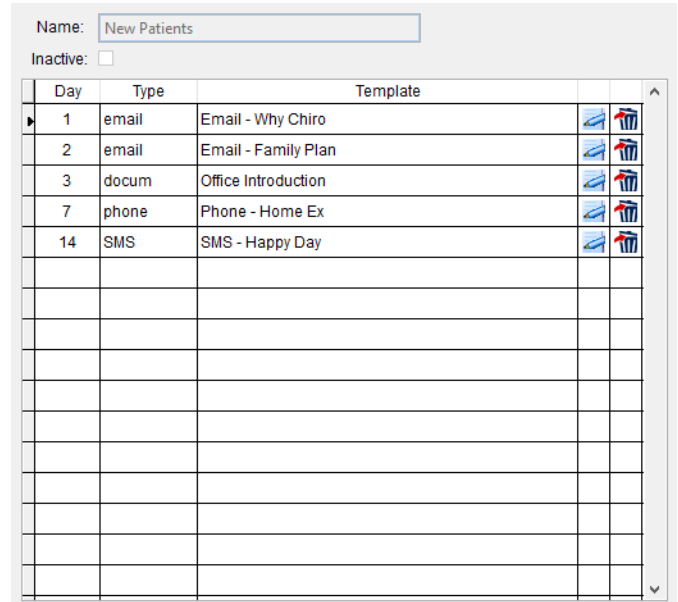
1. **Click Add:** click Add to start creation of a new campaign
2. **Name:** type a name for the campaign (in our example we will use New Patient)
3. **Schedule Creation:** area where you add the template schedule – templates are assigned by Day (based on the date the patient is assigned to the selected Campaign)

For example: in the image below we have scheduled the patient to receive an email, after their first day, about the benefits of Chiropractic care called ‘Why Chiro?’.



The campaign will also include a few additional emails, a phone script and a text message.

Our example campaign includes a Day 2 email to remind patients about referring family members, a Day 3 document introducing the office procedures, a Day 7 phone call to remind patients of the importance of doing their home exercises and a Day 14 text message advising the patient to think about how much better they feel after only a couple weeks of Chiropractic care.



Day	Type	Template	
1	email	Email - Why Chiro	
2	email	Email - Family Plan	
3	docum	Office Introduction	
7	phone	Phone - Home Ex	
14	SMS	SMS - Happy Day	

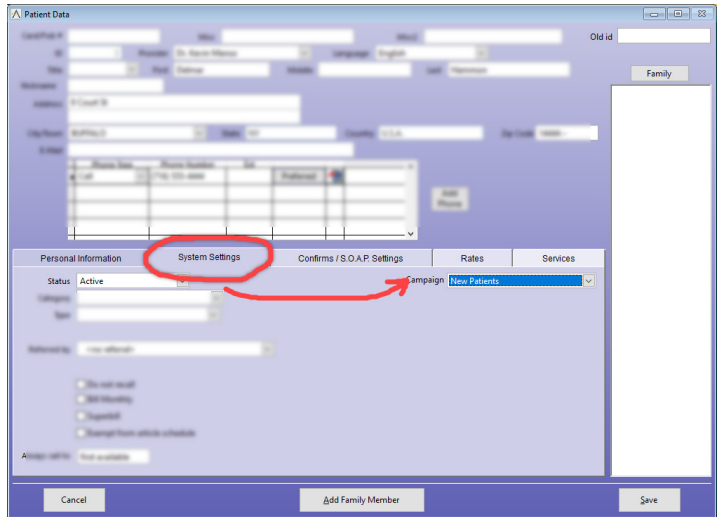
These messages and reminders are an integral part of fostering lifelong chiropractic patients.

We recommend mapping out your plan for a campaign prior to entering it into Atlas. Design your templates, plan the daily schedule and once mapped, begin entering that map into Atlas.

Link Patients to a Campaign

The next step in using Campaigns is to link specific Patients to a Campaign. Open the patient profile (click EDIT on their profile), go under their System Settings tab and choose the appropriate Campaign from the drop down menu.

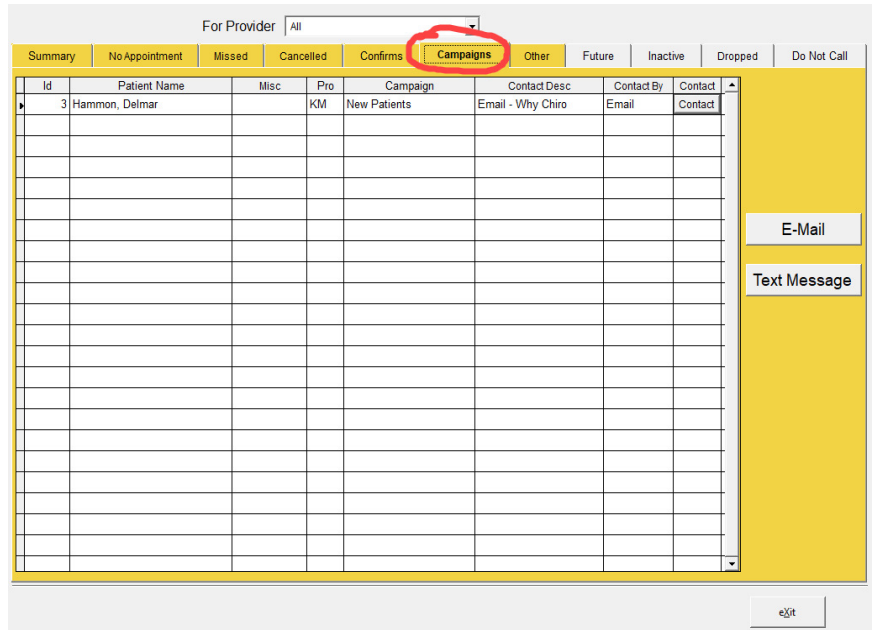
After applying the patient into their Campaign you are almost done!



The only thing left to do is check the Safety Net each day to send the messages – this can be completed with just a couple clicks!

Click the **Safety Net** button at the top of Atlas.

- Click the **Campaigns** tab and let Atlas auto-populate the list of pending messages
- Click the large **Email** button along the right side to have Atlas send the emails
- Click the large **Text Message** button along the right side to have Atlas send the text messages
- Click the **Contact** button on any remaining patients (they most likely are scheduled for a phone call)
Atlas will display the script to help you remember what to say! – Click to ‘Drop from Safety Net’ when you complete the call.



Customer Support:

Atlas Support personnel are trained specifically on the Atlas Chiropractic Software. On occasion, they are able to assist with general computer support (networking, antivirus, and configuration). Atlas recommends that issues outside of the scope of Atlas Support be directed to the appropriate Support professional. A qualified, onsite IT technician can provide you with the most accurate information to resolve your Technical Issues. Atlas Support may be able to assist your technician in resolving issues regarding your Operating System or System Maintenance, to help facilitate the proper function of Atlas.

Support Contact Information:

Mon-Thu: 8am to 7:30pm EST Fri: 8am to 4:30pm EST

Phone: 1-866-76ATLAS (2-8527)

Fax: 1-226-315-1900

Email: support@atlaschirosys.com

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