



PODIUM INSTRUCTIONS

1. To create a conversation with a patient, click on the blue button with the pencil icon. It looks like this:



(On the mobile site, it is a blue circle at the bottom of the screen with the "+" sign. Click that and then click "message")

2. After you hit that button, you will select the clinic location your patient is being seen at.
 - Enter the phone number or email address of the person you are trying to chat with.
 - Then enter the person's first name in the second field.
 - In the bottom of the screen, you can write your message.

TEMPLATES: Review invitation template, directional template, and patient form template are just some examples of templates created.

Podium Invite seeking reviews should be sent EVERYDAY to each patient that had great experiences in the clinic.

- To access a template, click "template" (notebook icon on mobile) and the list of templates will show up.
- Click the template you would like to use.
- Hit the gray button labeled: "Send & Close"

3. **IF A PATIENT SENDS A MESSAGE BACK:** You can type a response in the bottom field and hit the gray button labeled: "Send & Close".