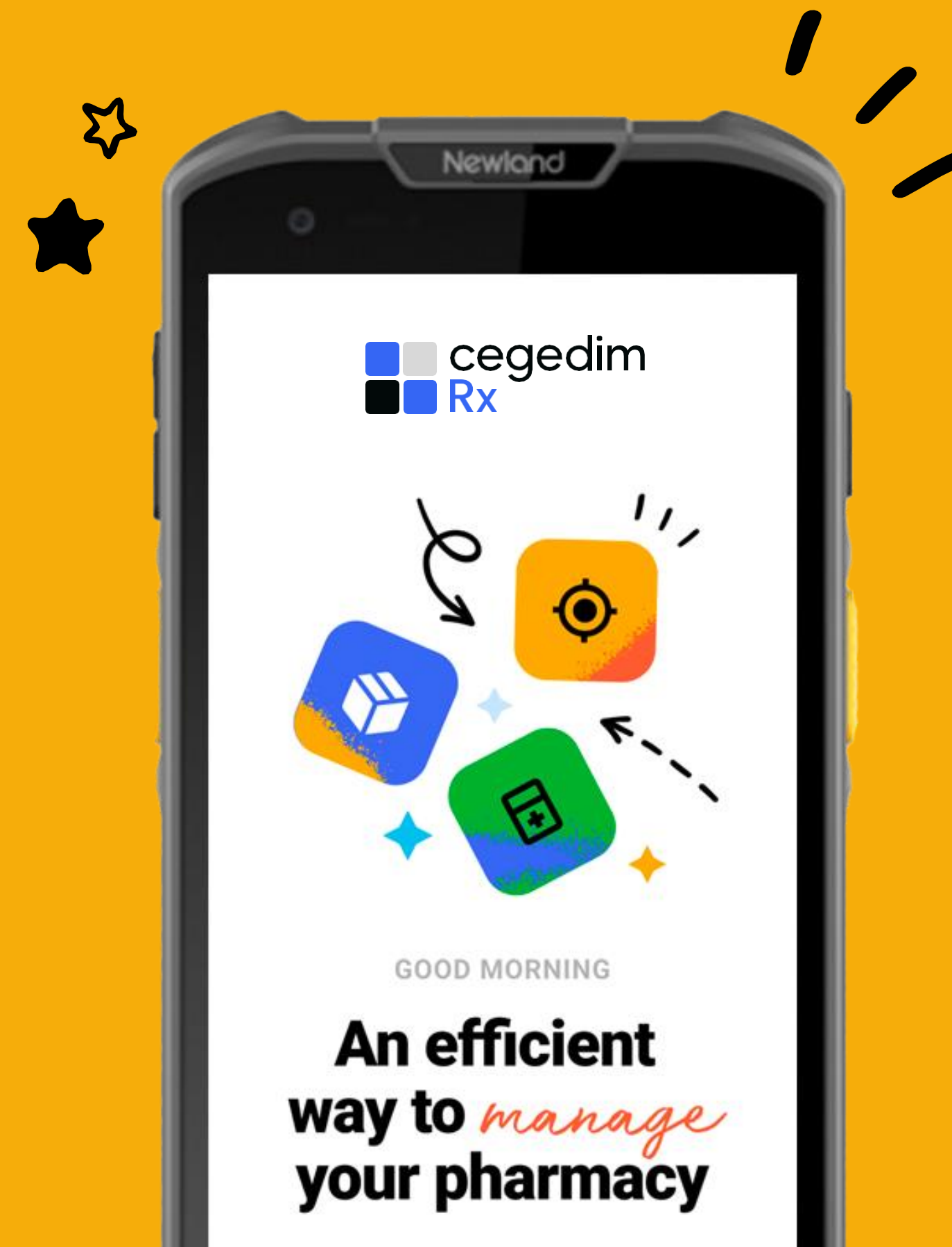


CRX CHAT

Quickstart Guide



Step 1: Activating CRx Chat

CRx Chat (formerly known as SMS Messaging) offers customisable settings to suit your business needs. Once activated, it alerts patients when their prescription is ready for collection. This guide walks you through setting up and using CRx Chat after your order has been processed.

To activate CRx Chat:

1 Open SMS Settings.

From the Pharmacy Manager toolbar, select Tools – Settings and choose SMS to open the SMS settings screen.

2 Turn on SMS Messaging

In the Activation section, switch the SMS Messaging toggle to On. When enabled, Automatically send SMS upon Scan to Shelf is turned on by default (you can switch this off if required).

3 Save your changes

Select Save Changes to confirm and activate SMS messaging. Once saved, additional SMS options (Messaging, Exclusions, Send Hours) become available.



Step 2: Composing Your Collection Message

CRx Chat enables you to send automated alerts to patients when their prescription is ready for collection. A clear, consistent message improves patient experience and reduces phone inquiries.

To set your collection message:

1 Navigate to the Messaging section.

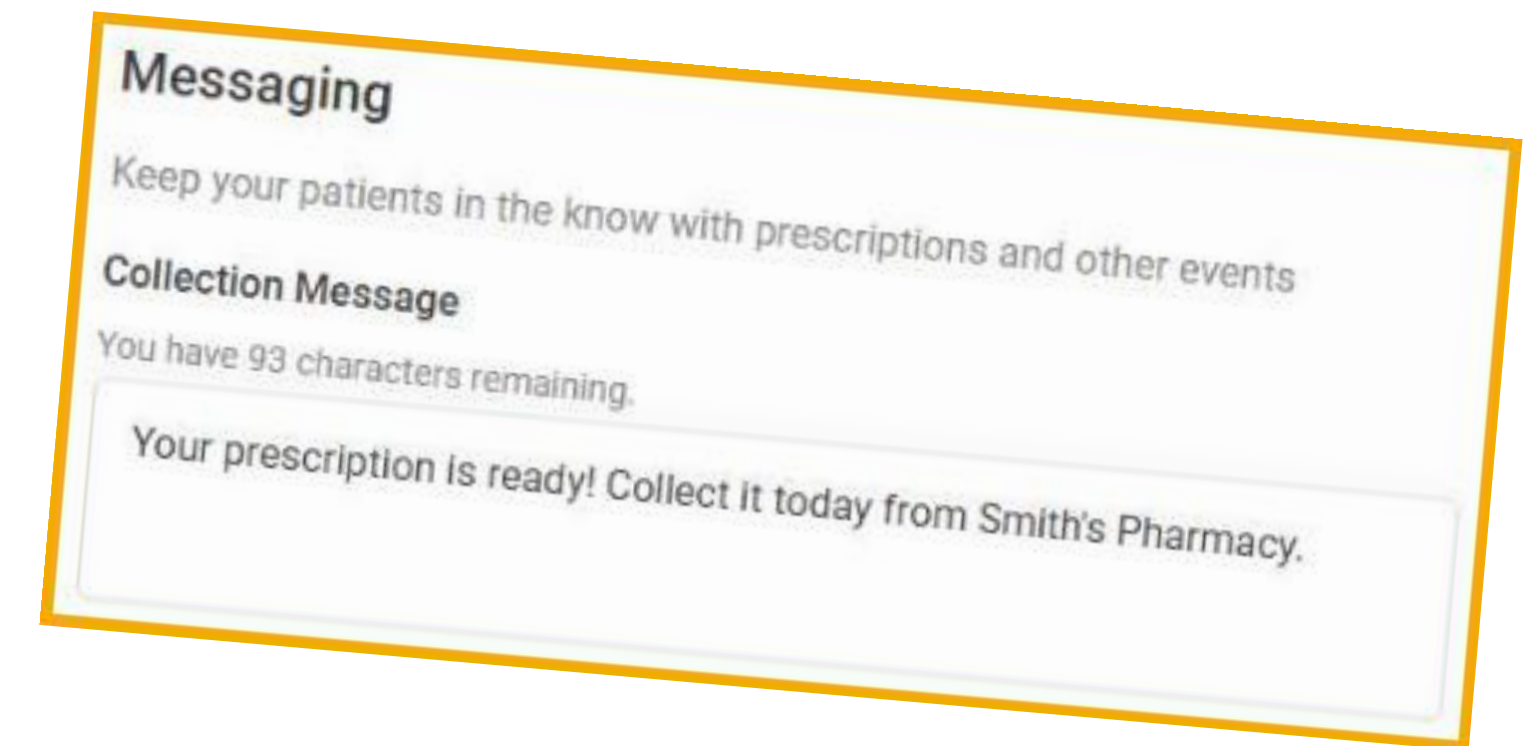
In the SMS settings screen, go to the messaging section.

2 Type your message

In the Collection Message section, type the message you want to send to patients when their prescription is ready for collection.

3 Save your changes

Select Save Changes to apply your message.



Best Practice:

Keep messages short, friendly and include key details (e.g. "ready to collect", pharmacy name etc.)

Step 3: Managing Exclusions & Send Hours

CRx Chat helps keep patients informed when their prescription is ready for collection. To ensure messages are sent only when appropriate, you can exclude certain patient types and set custom message send hours.

To configure exclusions and send times:

1 Access the Exclusions section.

In the SMS settings screen, go to the Exclusions tab. Select one or more patient types to exclude.

Exclusions

Please select any patient type(s) you want to exclude (if any)

Any Patients that are Under 18, marked as deleted or deceased, or do not have a mobile number are excluded by default.

App Patients

MDS Patients

MDSC

Delivery Patients

Robot Collection

2 Set your message send hours.

Go to the Message Send Hours tab.

- Default: Monday to Sunday, 9:00 AM – 5:00 PM
- To customise: Select Custom Hours, then:
 - Tick the days you want to send messages
 - Set a Start Time and End Time for each day

Message Send Hours

When do you want to message your patients?

Default Hours

9am – 5pm Monday to Sunday

Custom Hours

Set your own time frame

Day of the Week	Start Time	End Time
Monday	09:00	17:00
Tuesday	09:00	17:00
Wednesday	09:00	17:00
Thursday	09:00	17:00
Friday	09:00	17:00
Saturday	09:00	17:00
Sunday	09:00	17:00

Need Help

Our Service Desk provides technical support, you can reach us in several ways:

- WhatsApp: 0741 831 2263
- Phone: 0330 303 3340
- Live chat service on our website.

For training queries, contact our Training team on 0330 818 1619.





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