

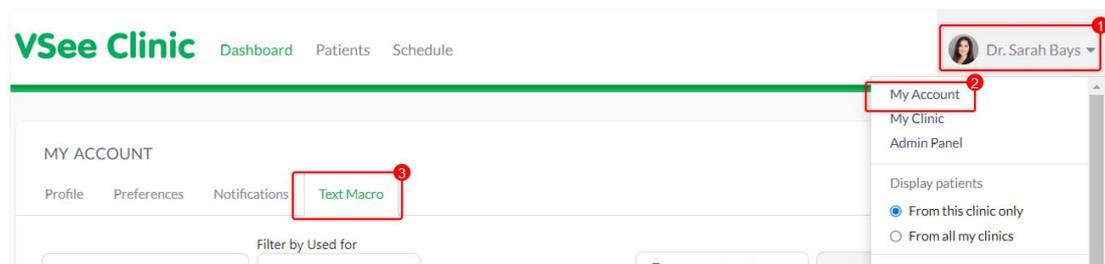
## How to Manage Text Macro

Jay-Ileen (Ai) - 2024-03-20 - [VSee Clinic for Admins](#)

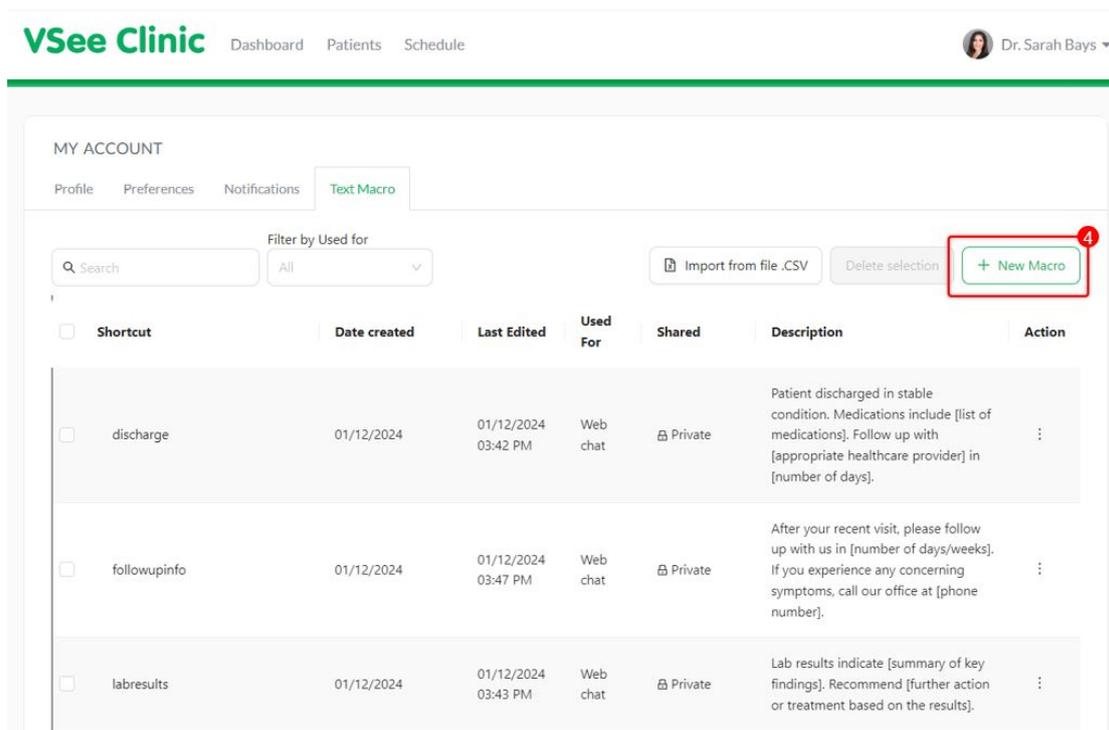
Both Providers and Clinic Admins have access to manage the Text Macro feature. You can create, edit, and assign the text macro keys under **Chats**, **Notes**, and **Memo**.

### How to Manage Text Macro as a Provider

1. Click on **Your Name** or the **Profile Menu**.
2. Select **My Account**.
3. Click on **Text Macro**.



4. Click **+Text Macro**.



5. Enter the **Shortcut** text.

6. Under **Used for**, select if for **Web chat**, **Visit note**, or **Memo**.

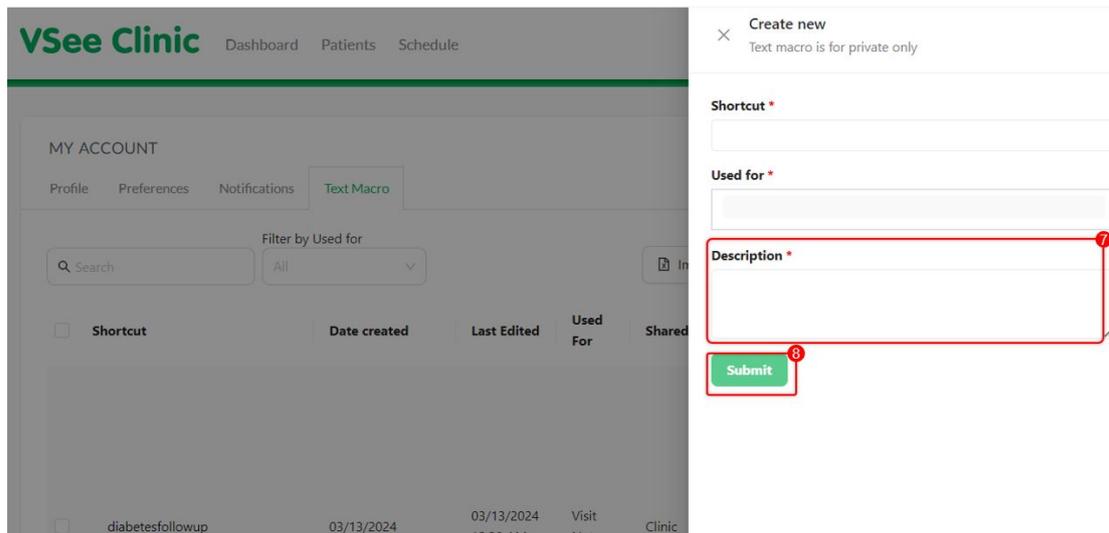
The screenshot shows the VSee Clinic interface with a 'Create new' modal open. The modal has a title 'Create new' and a subtitle 'Text macro is for private only'. It contains a 'Shortcut \*' text input field, a 'Used for \*' dropdown menu, and a 'Submit' button. The dropdown menu is open, showing three options: 'Web chat', 'Visit note', and 'Memo'. Red boxes with numbers 5 and 6 highlight the 'Shortcut \*' field and the 'Used for \*' dropdown respectively. The background shows the 'Text Macro' section of the user's account settings.

*Note: You can select multiple options from the dropdown.*

This screenshot shows the same 'Create new' modal as the previous one, but the 'Used for \*' dropdown is now a multi-select field. It contains three selected items: 'Web chat', 'Visit note', and 'Memo', each with a small 'x' icon to its right. The 'Description \*' text input field is now visible below the dropdown. The 'Submit' button remains at the bottom. The background interface is the same as in the previous screenshot.

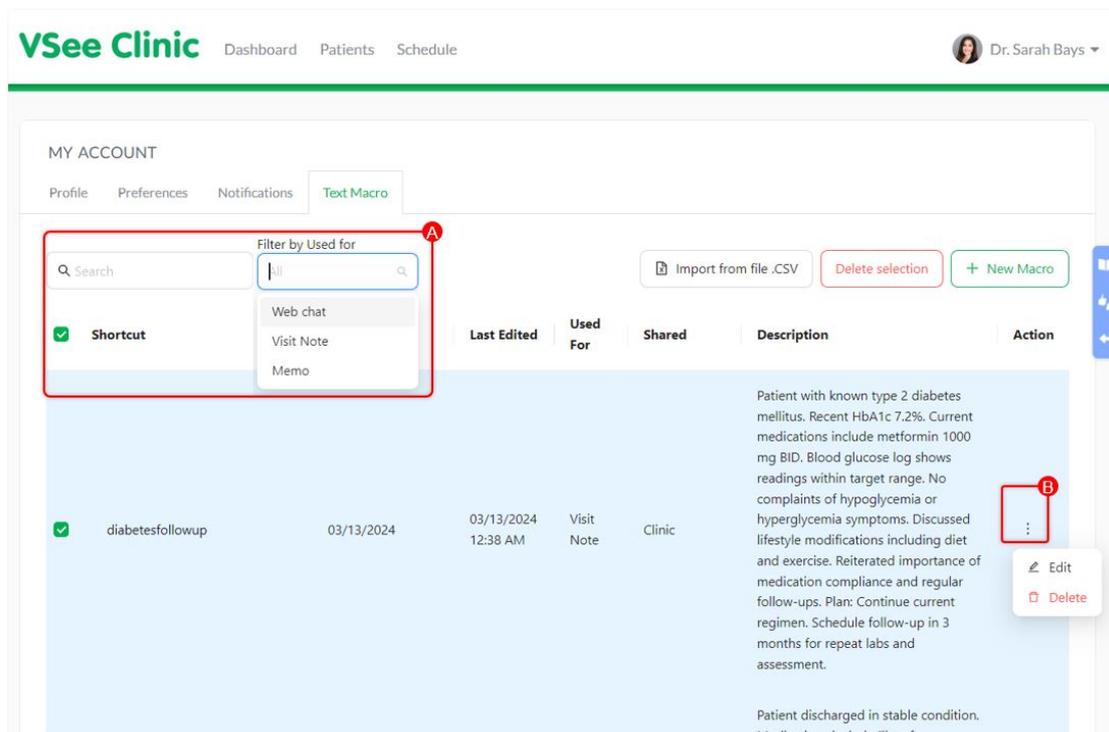
7. Add the **Description**.

8. Click on **Submit** to save.



A. You can use the search bar and filter when searching for a Text Macro you created.

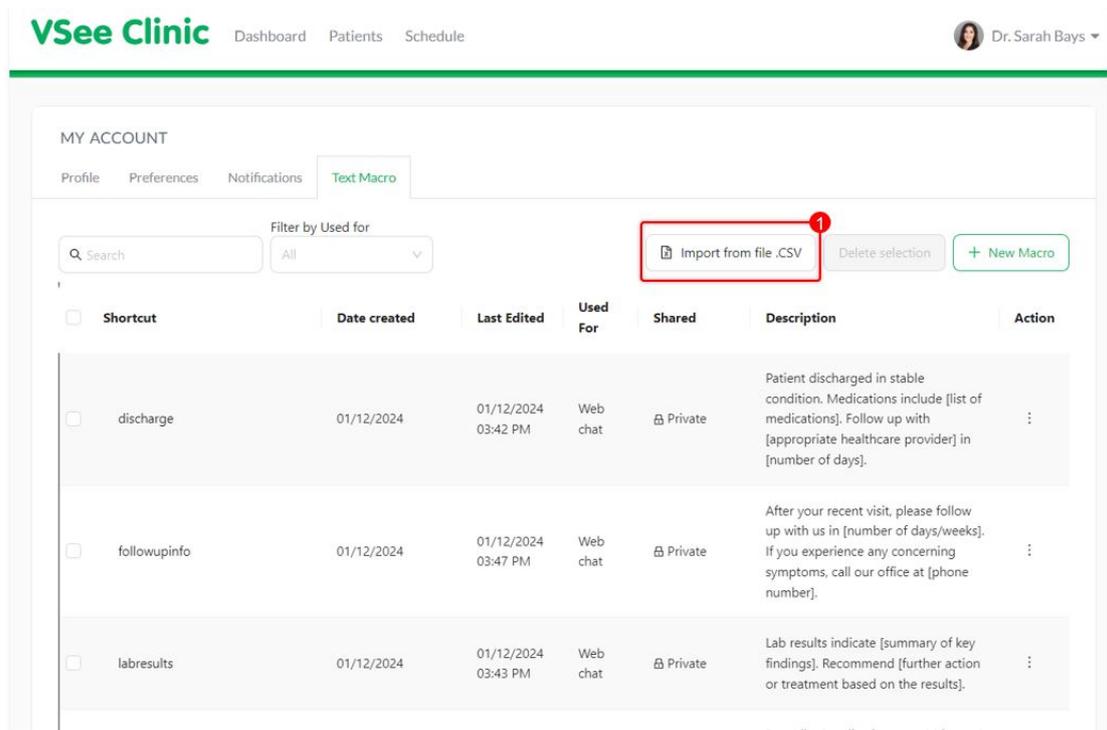
B. On the 3 dots or ellipsis, you can edit or delete the Text Macro.



## Importing a .csv file

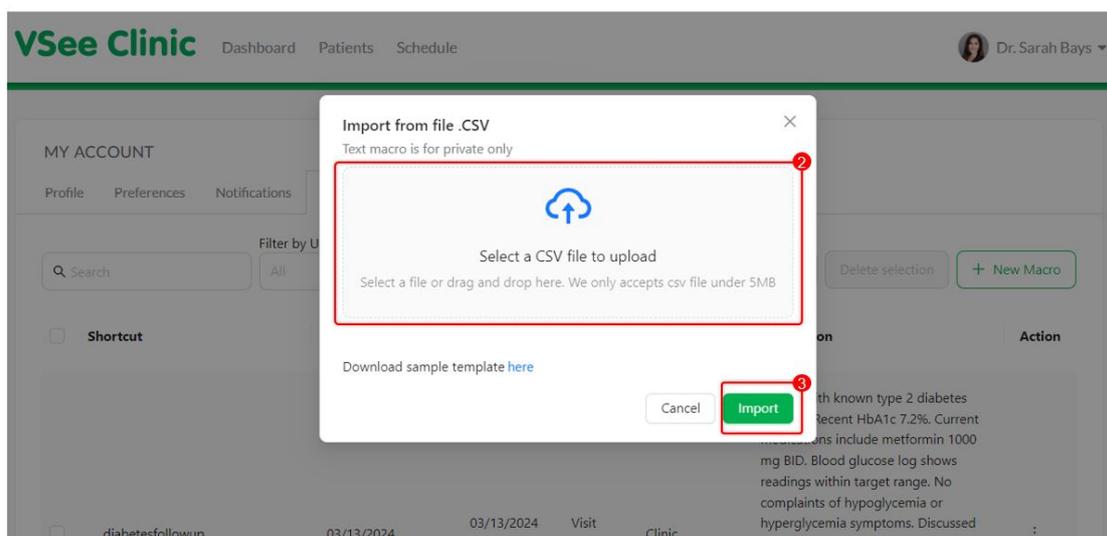
You also have the option to import a .csv file.

1. Click on **Import from file .CSV.**



2. A pop-up window will appear. Click on **Select a CSV file to upload** and select the file from your device.

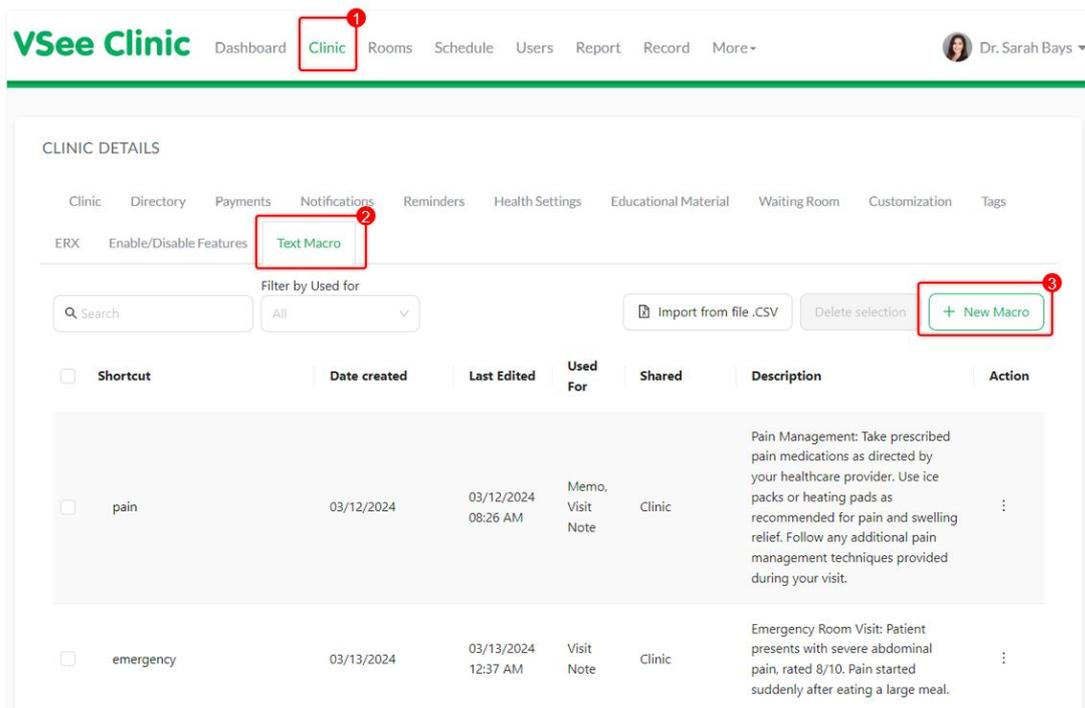
3. Click on **Import** to save.



*Note: A Provider is not able to edit Text Macros created by other Providers.*

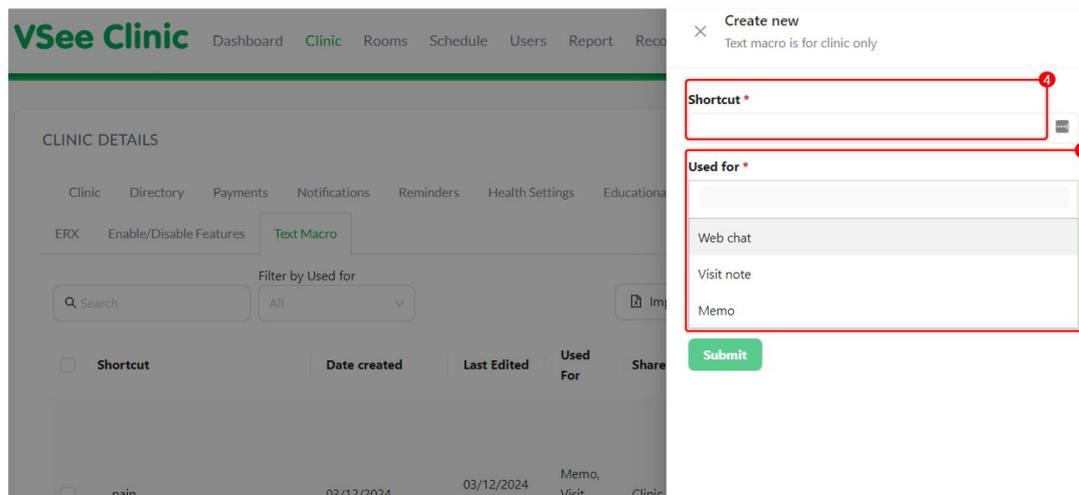
## How to Manage Text Macro as a Clinic Admin

1. Go to the **Clinic** tab.
2. Select **Text Macro**.
3. Click on **+New Macro**.

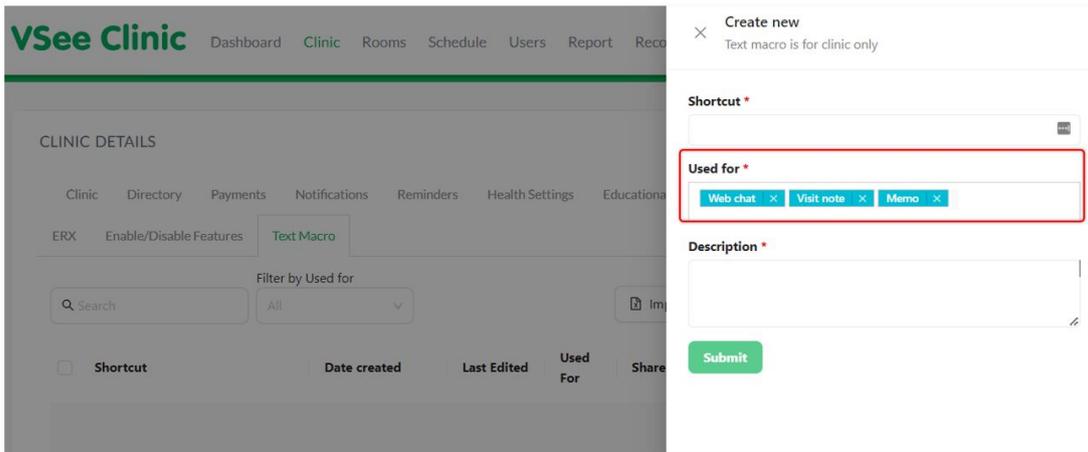


4. Enter the **Shortcut** text.

5. Under **Used for**, select if for **Web chat**, **Visit note**, or **Memo**.

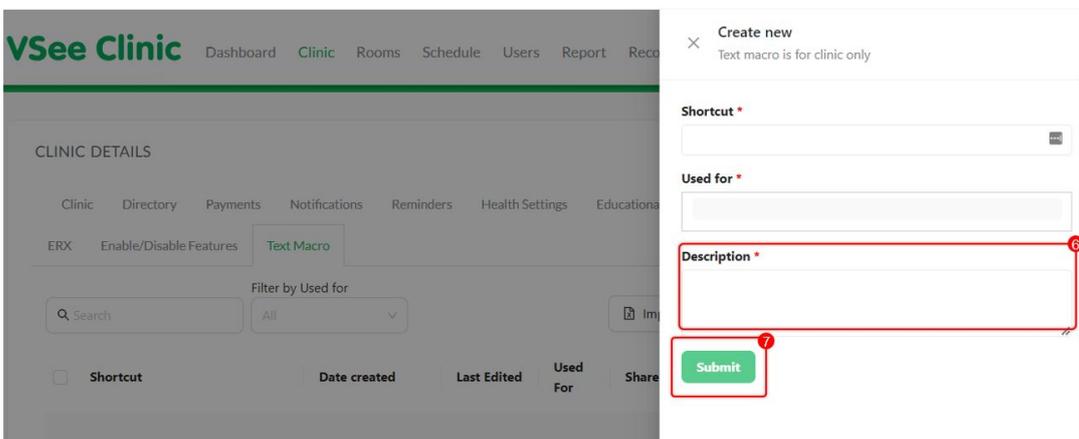


*Note: You can select multiple options from the dropdown.*



6. Add the **Description**.

7. Click on **Submit** to save.



A. You can use the search bar and filter when searching for a Text Macro you created.

B. On the 3 dots or ellipsis, you can edit or delete the Text Macro.

*Note: You also have the option to import a .csv file.*

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CLINIC DETAILS

Clinic Directory Payments Notifications Reminders Health Settings Educational Material Waiting Room Customization Tags

ERX Enable/Disable Features **Text Macro**

Search Filter by Used for

Web chat  
Visit Note  
Memo

Import from file .CSV Delete selection + New Macro

Shortcut	Last Edited	Used For	Shared	Description	Action
✓ pain	03/12/2024 08:26 AM	Memo, Visit Note	Clinic	Pain Management: Take prescribed pain medications as directed by your healthcare provider. Use ice packs or heating pads as recommended for pain and swelling relief. Follow any additional pain management techniques provided during your visit.	⋮ Edit Delete
✓ emergency	03/13/2024 12:37 AM	Visit Note	Clinic	Emergency Room Visit: Patient presents with severe abdominal pain, rated 8/10. Pain started suddenly after eating a large meal.	⋮

## Notes:

- A Provider is not able to edit Text Macros created by other Providers.
- Clinic Admins can manage Text Macro at the clinic-wide level and not per room level

## Related Article:

- [How to Use Text Macro](#)

Need more assistance? Send us an email at [help@vsee.com](mailto:help@vsee.com) or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

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