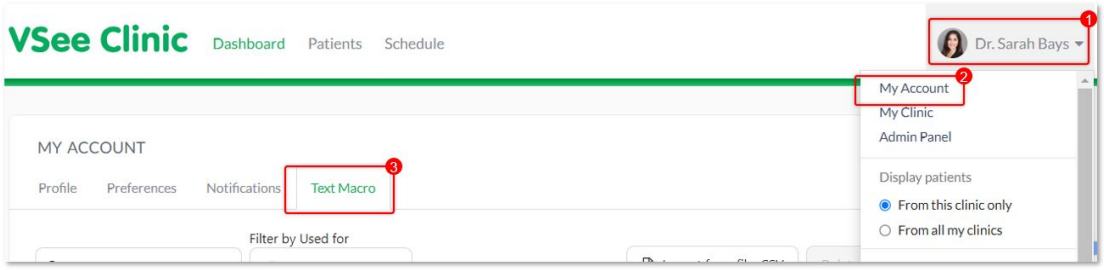
# How to Manage Text Macro

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

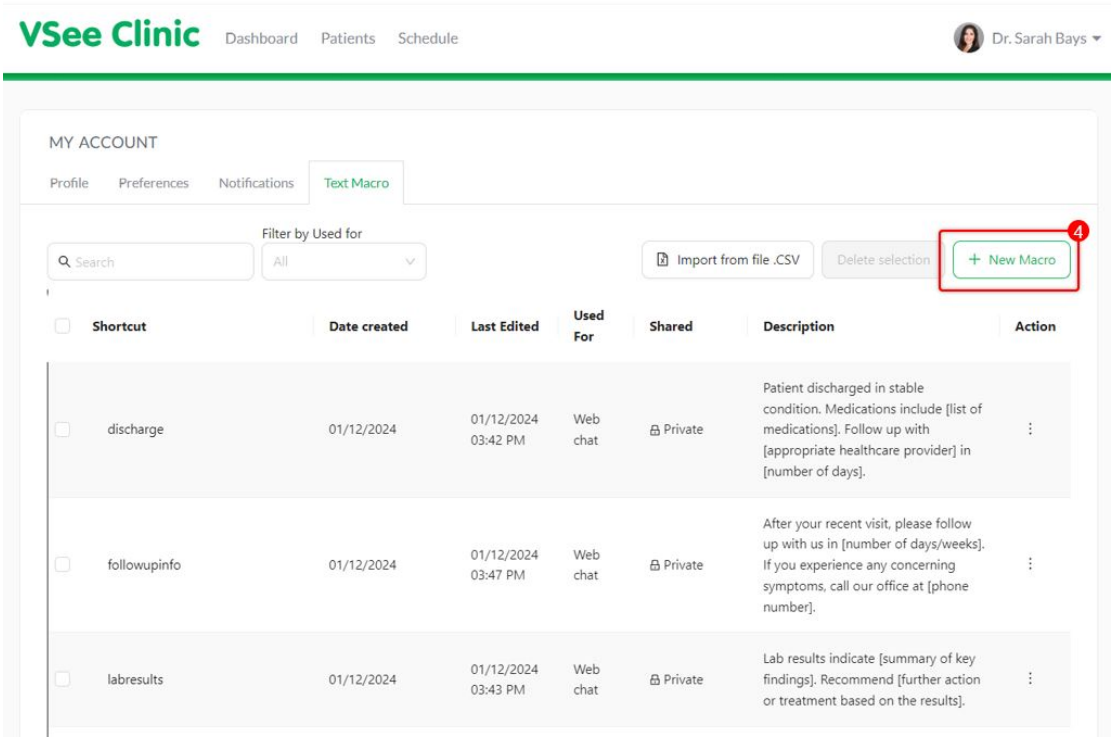
Both Providers and Clinic Admins have access to manage the Text Macro feature. You can create, edit, and assign the text macro keys under **Chats**, **Notes**, and **Memo**.

## 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**.

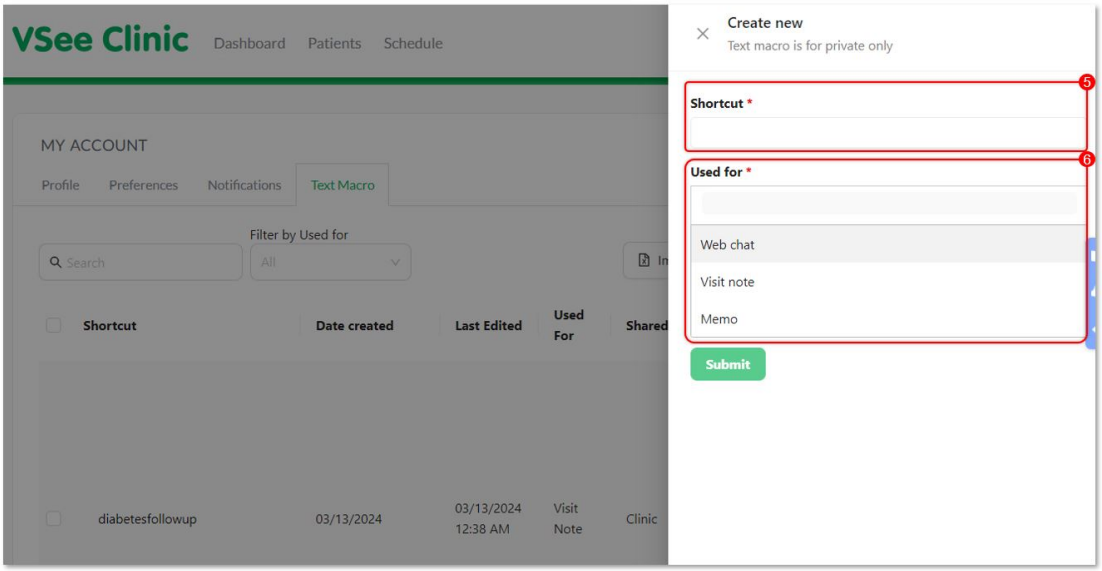



4. Click **+Text Macro**.

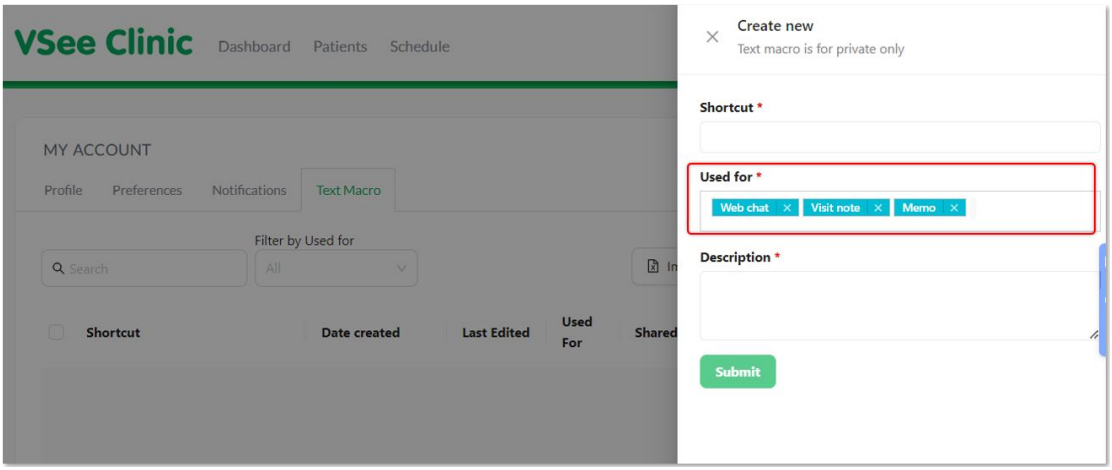


5. Enter the **Shortcut** text.

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

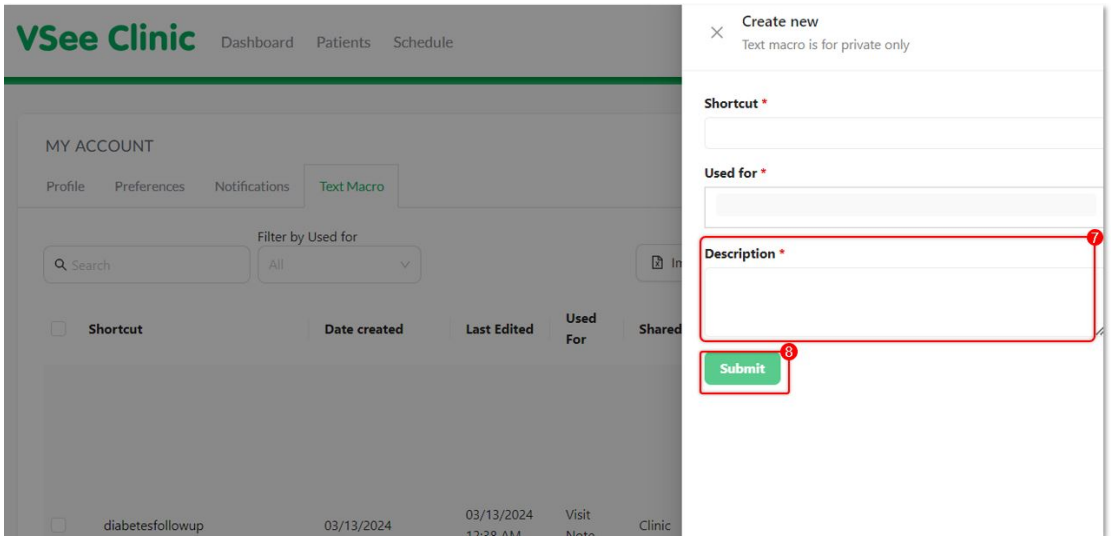



*Note: You can select multiple options from the dropdown.*



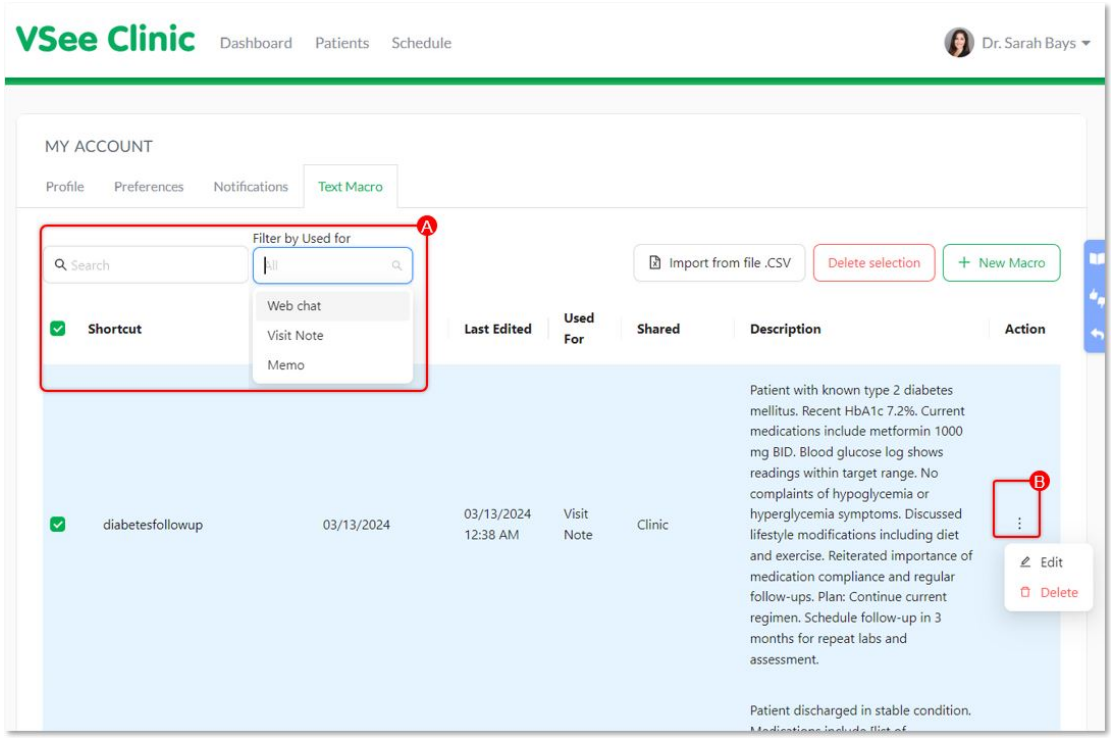

7. Add the **Description**.

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




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

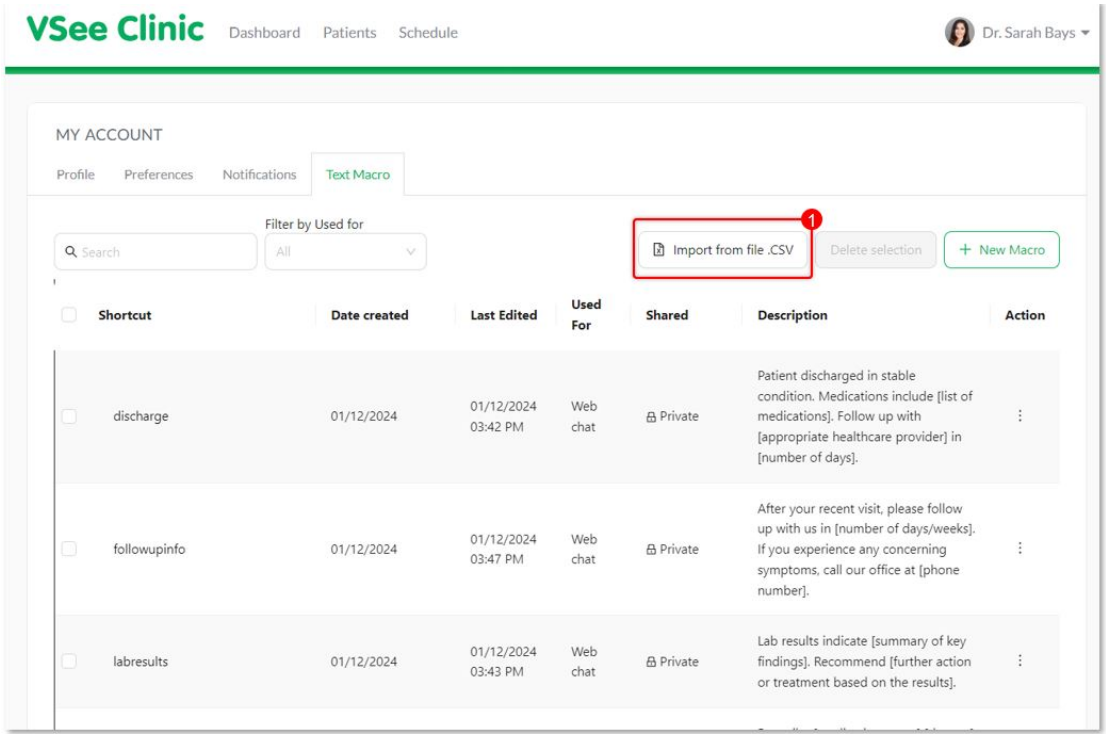
B. On the 3 dots or ellipsis, you can edit or delete the Text Macro.




**Importing a .csv file**

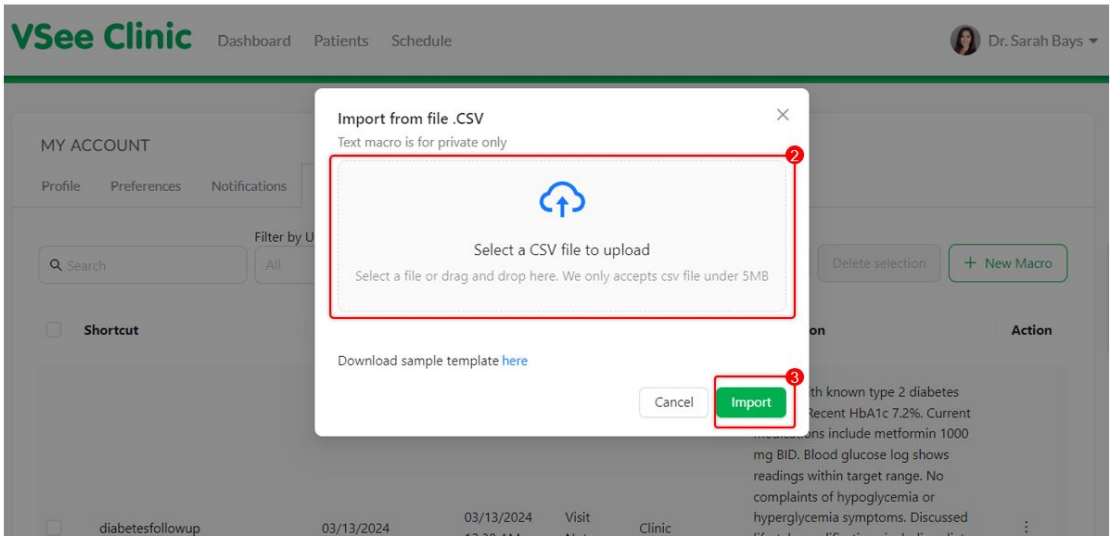
You also have the option to import a .csv file.

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.



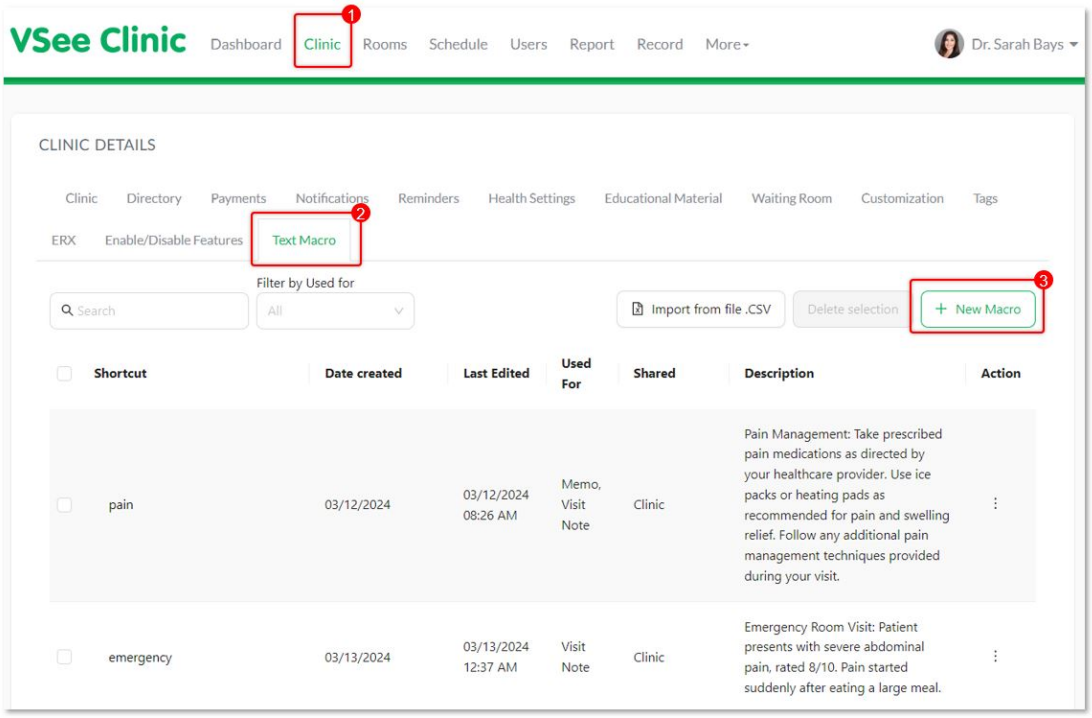

*Note: A Provider is not able to edit Text Macros created by other Providers.*

## How to Manage Text Macro as a Clinic Admin

1. Go to the **Clinic** tab.

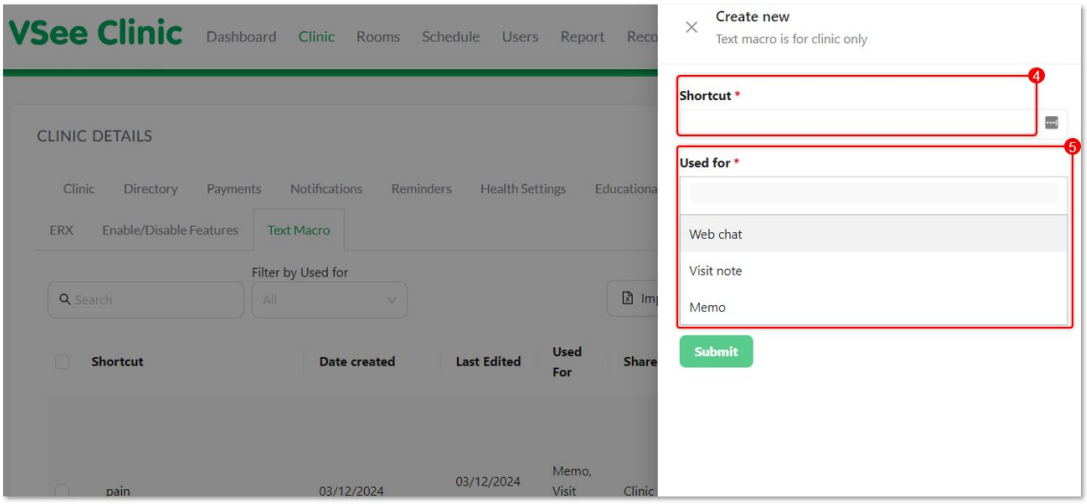
2. Select **Text Macro**.

3. Click on **+New Macro**.

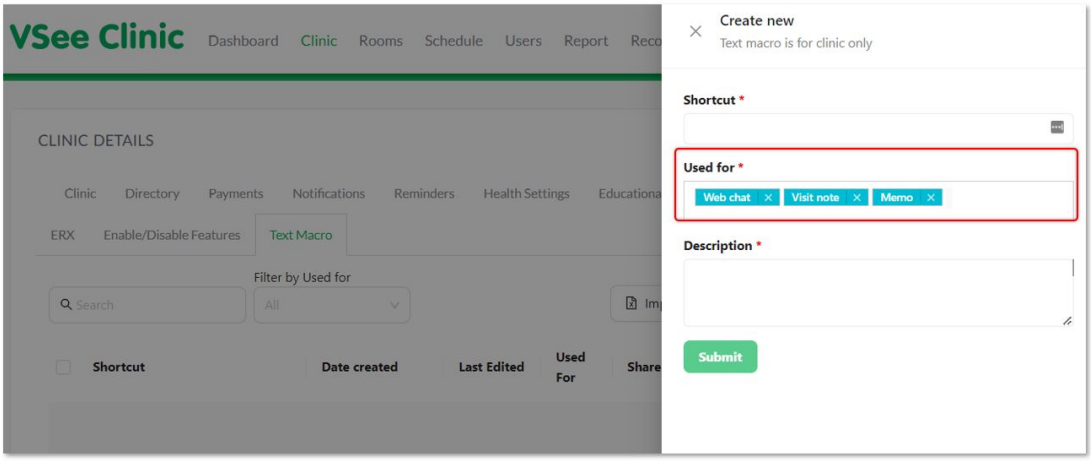



4. Enter the **Shortcut** text.

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

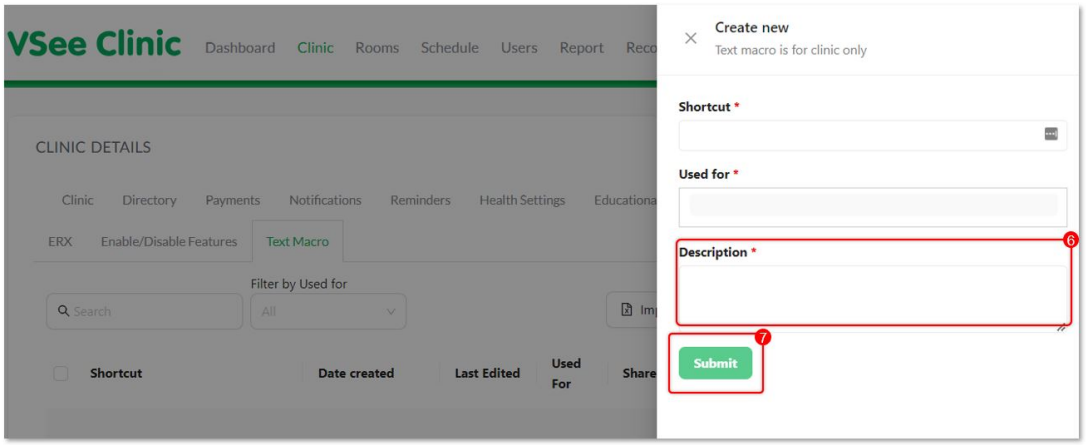



*Note: You can select multiple options from the dropdown.*




6. Add the **Description**.

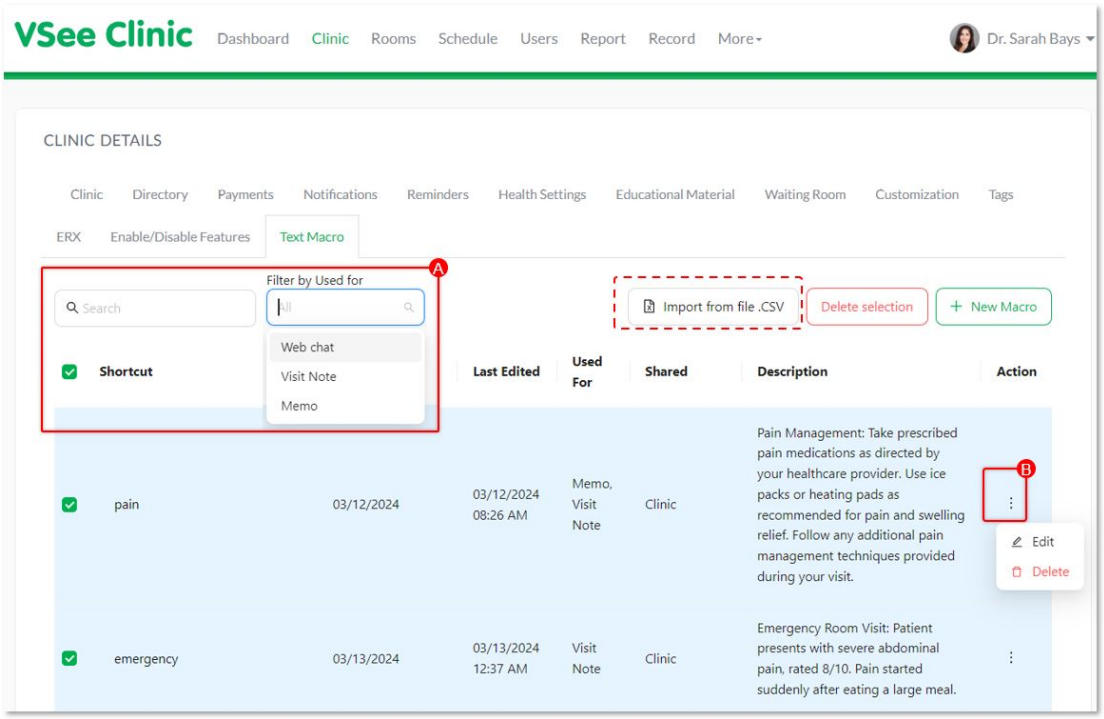
7. Click on **Submit** to save.




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.*




## 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 or check out the Help section under the Profile Menu of your VSee Clinic.

- Tags
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