

How to Manage Text Macro

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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.

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