

# Macros

**Macros** allow you to reference information from your customer and the appointment in your text messages and emails. They allow you to create a single template that feels personally written for every individual customer by pulling specific data points from your database.

Here is a breakdown of how to master their use:

## The Anatomy of a Macro

For the system to recognize a macro, it must be wrapped in a specific set of characters:

- The Trigger: \$(
- The Field Name: NAME\_OF\_FIELD
- The Closer: )

Complete Syntax: \$(D\_LONG)

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## How They Work (The Transformation)

When the system prepares to send a message, it scans the text for that specific syntax and "swaps" it for the real-world value stored in the appointment record.

Use Case	Macro to Use	Final Output Example
Formal Date	\$(D_LONG)	October 17th, 2025
Appointment Time	\$(TIME)	2:15 PM
Customer Name	\$(C_NAME)	Alex Rivera

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## Example Usage

In your Email Confirmation, you might say the following:

Dear \$(C\_NAME)

Your appointment is scheduled for \$(TIME) on \$(D\_LONG).

## Best Practices for Implementation

- Punctuation Matters: Be careful where you place periods or commas. If you write Hello \$(C\_NAME), the comma will appear immediately after the person's name in the final message.
  - The "Insert Macro" Button: This is your best friend. Instead of typing them manually (which can lead to typos), use the Insert Macro button found in your message editor. It provides a categorized list of every field available to you.
  - Test Your Layout: Always send a test message to yourself. Sometimes a macro (like a long address) can change the way text wraps in an SMS or email.
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