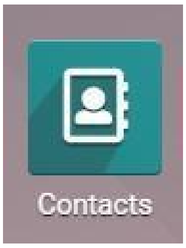
Training Manual

Humint O Lite

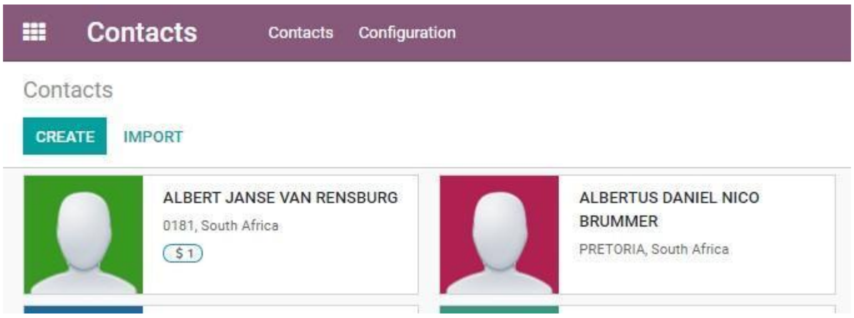
Version 16

Contacts



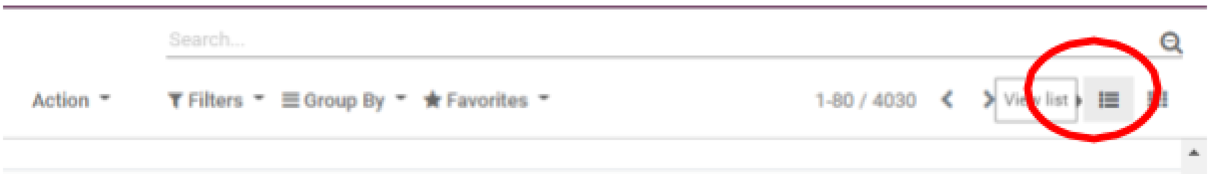
When you open this module, all of your contacts will be listed.

Vendors and Customers

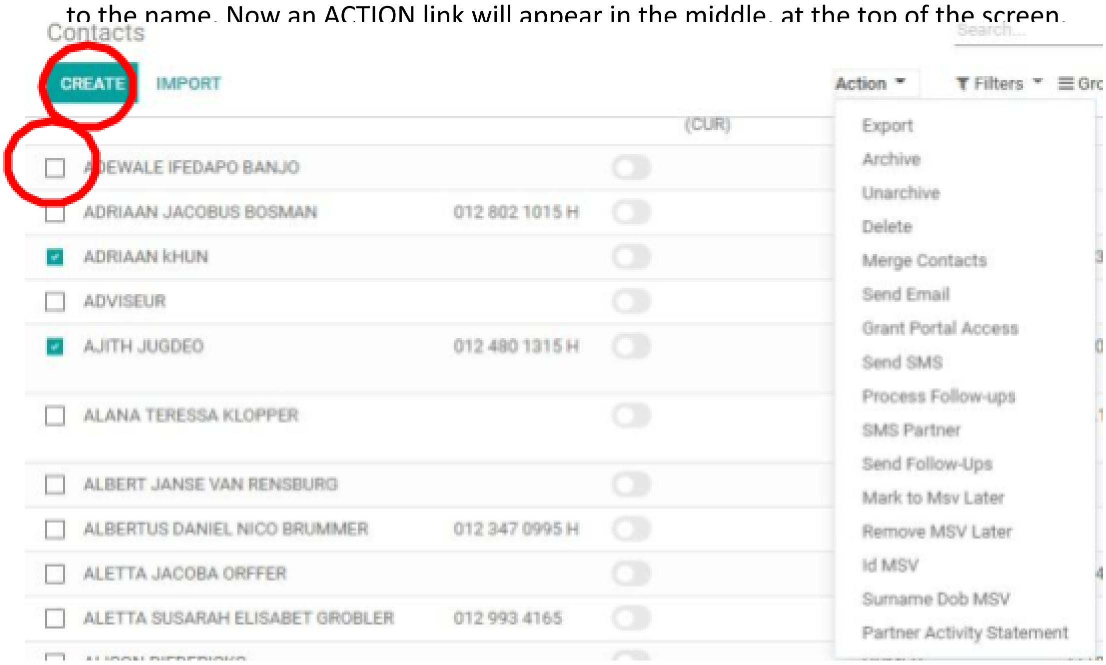


You can create a customer by clicking on CREATE

When you open your contacts in List View, you will be able to do the following:



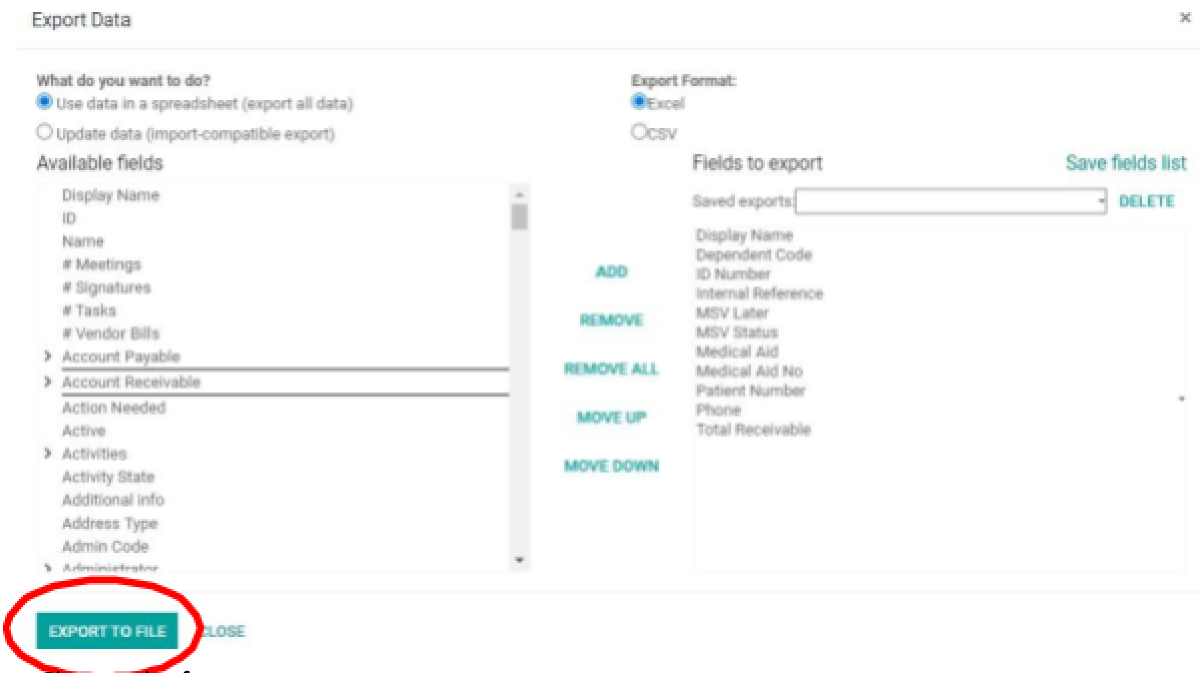
As soon as you select the patients you want to perform the action on by clicking in the tick box next to the name. Now an ACTION link will appear in the middle, at the top of the screen.



Actions

Export

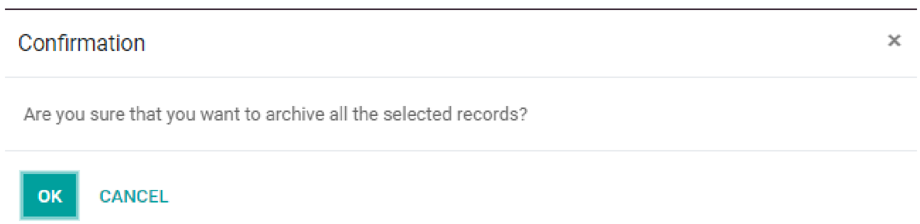
To export certain line items, you can filter and select all, or only select those you want to export.
Click on Export, once your contacts have been selected in the tick box
You will get to this screen:



Choose the format
Once you selected the chosen fields that you want to export, click on EXPORT TO FILE.
Add or Remove field by clicking on ADD or REMOVE

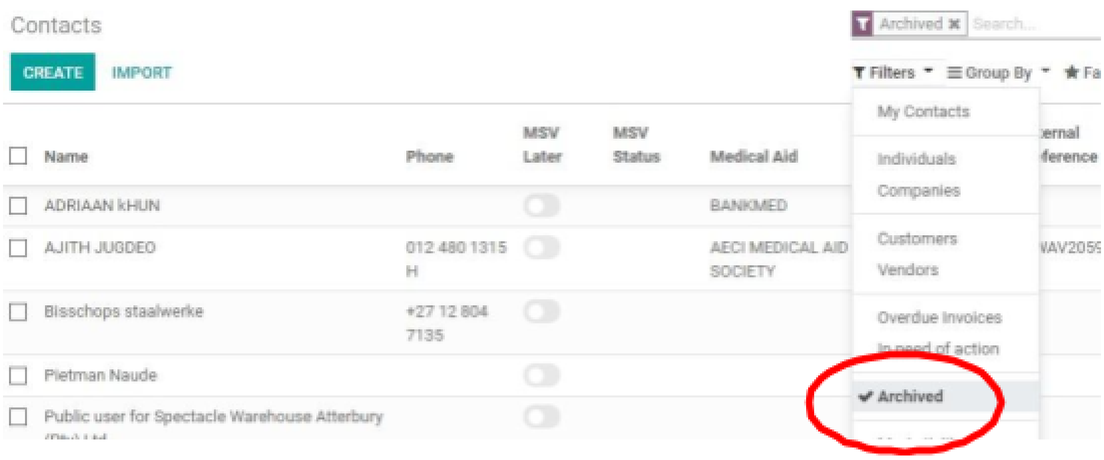
Archive

When you want to make a patient dormant, you can archive the account.
Select the contact in the tick box and the click ARCHIVE
Once this error message comes on, you click OK.

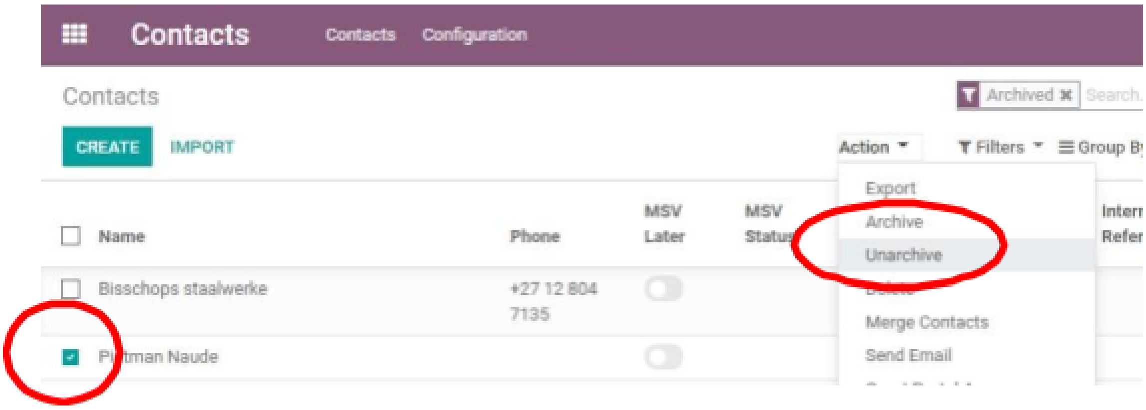


Unarchive

When you want to Unarchive a patient that has been Archived
Click on FILTERS -ARCHIVED

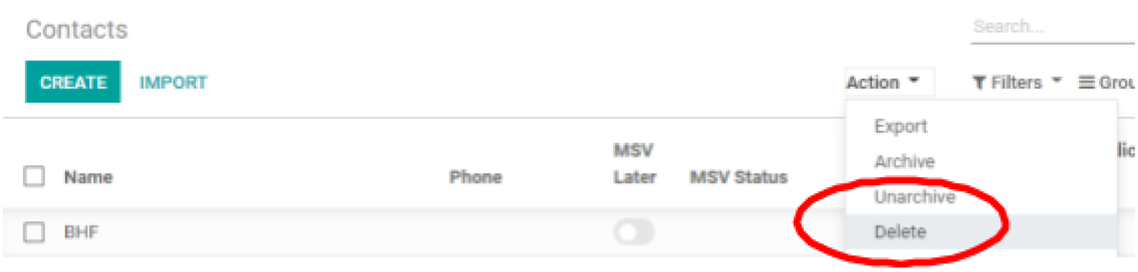


Then select the contact in the tick box and click on Unarchive.

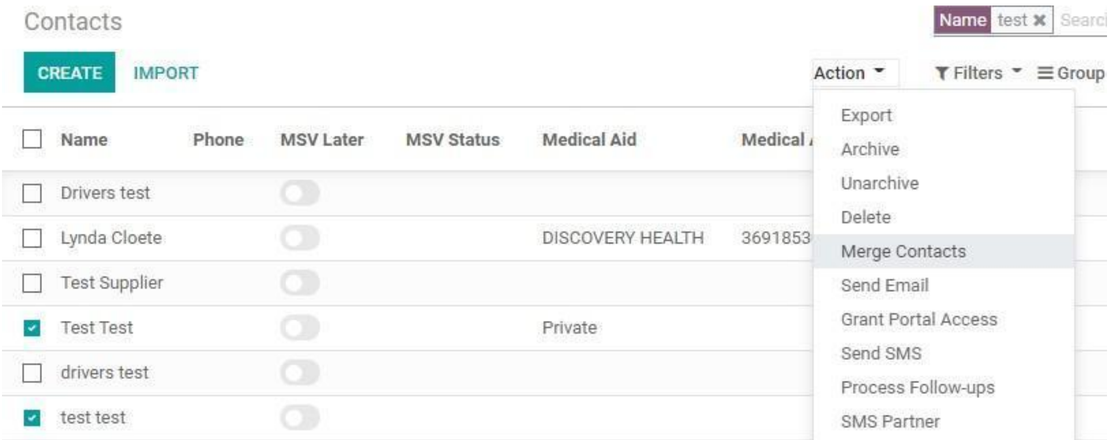


Delete

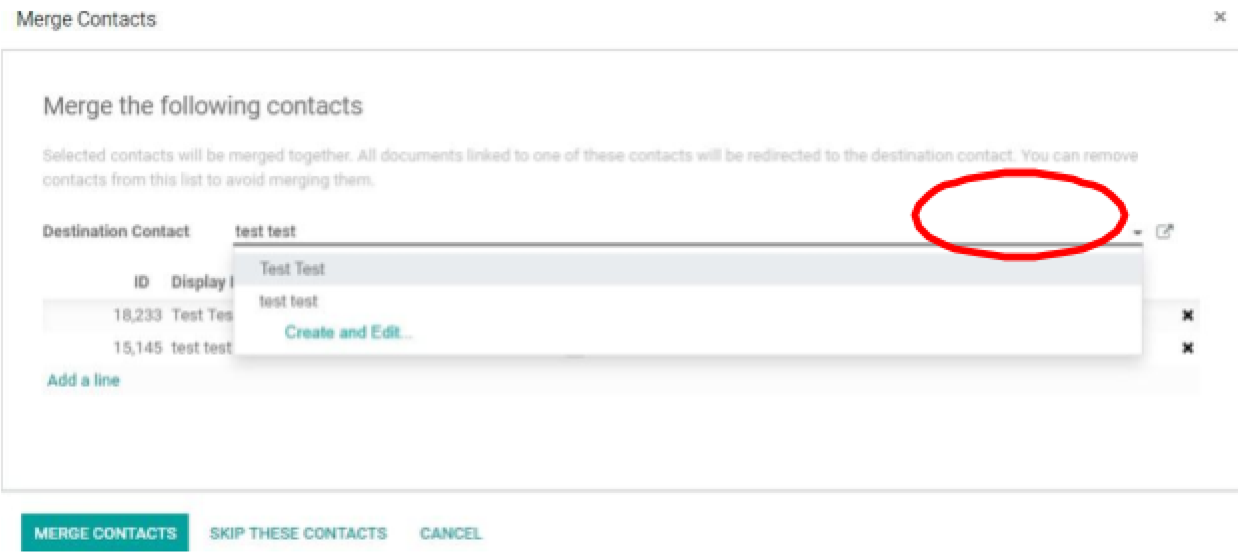
To delete a contact is a last resort. Rather use the archive option, when you delete, you will not be able to retrieve the information deleted



Merge Contacts



To merge contacts will combine the two contacts together.



The destination contact will be the contact that will be used. These contact details will be kept.

The other contact (The duplicate in most instances) will be dissolved.

Click on MERGE CONTACTS when done.

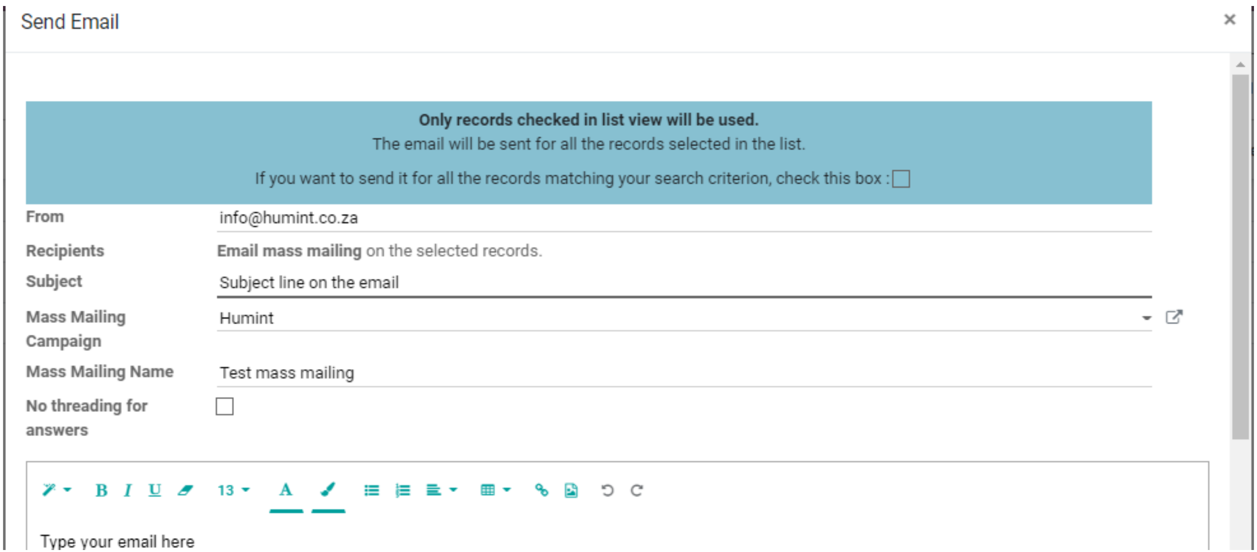
Send Email

Here you can select multiple contacts and send an email. You can set up an email template as well.

Select your contact

Click on Action

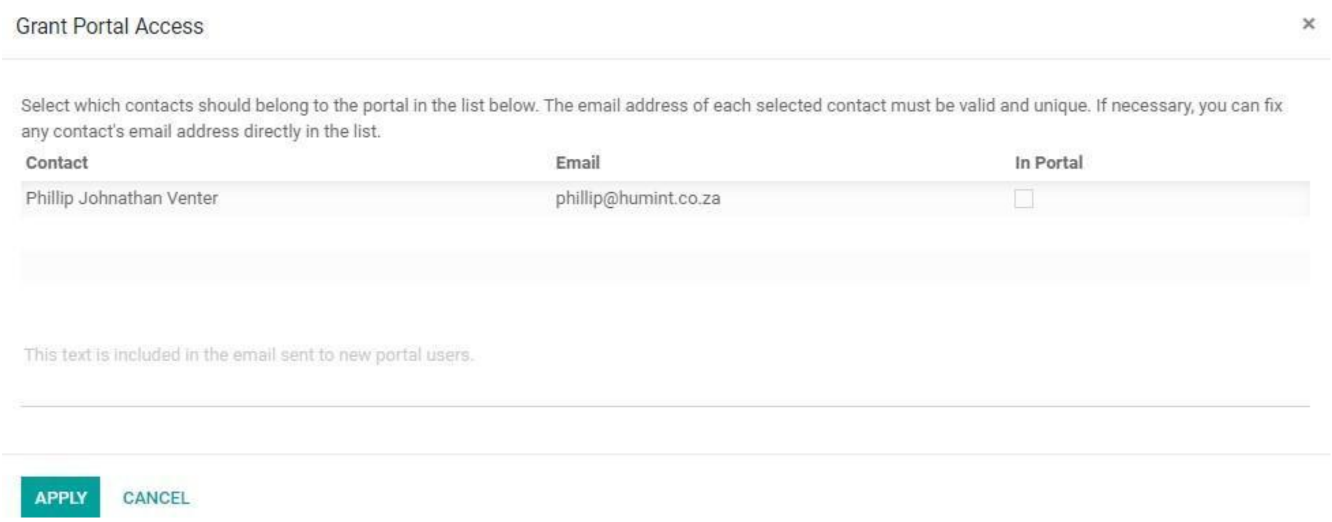
Click on Send Email



From – This will be the email address they receive the email from
Recipients – All of the contacts ticked
Subject – Subject in the email line
Mass mailing company – Select your Company - CREATE and EDIT if not yet in the dropdown list
Mass mailing name – Type the name of the mass email if you wish to categorise it
Click on SEND when done.

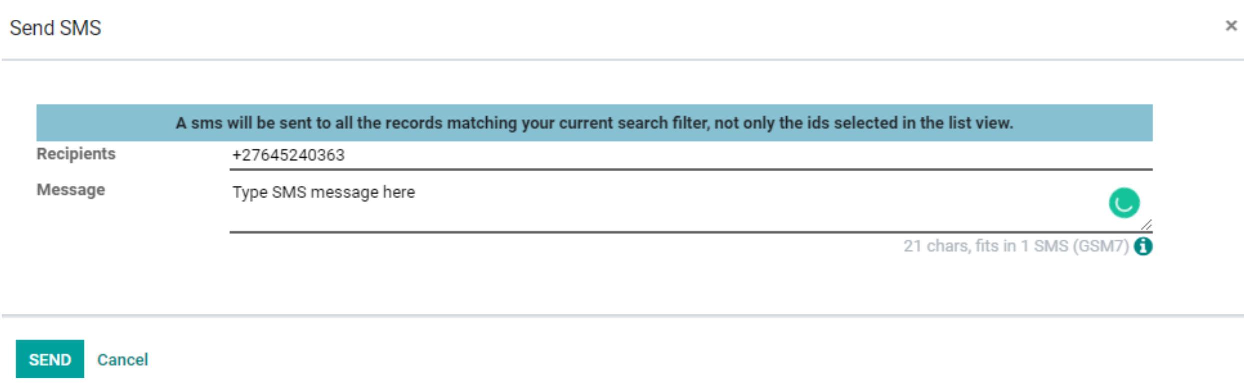
Grant Portal Access

This will give the contact access to log into the system as a user of the system.
An email will be sent to them to set up a password and allow them to log in



Send SMS

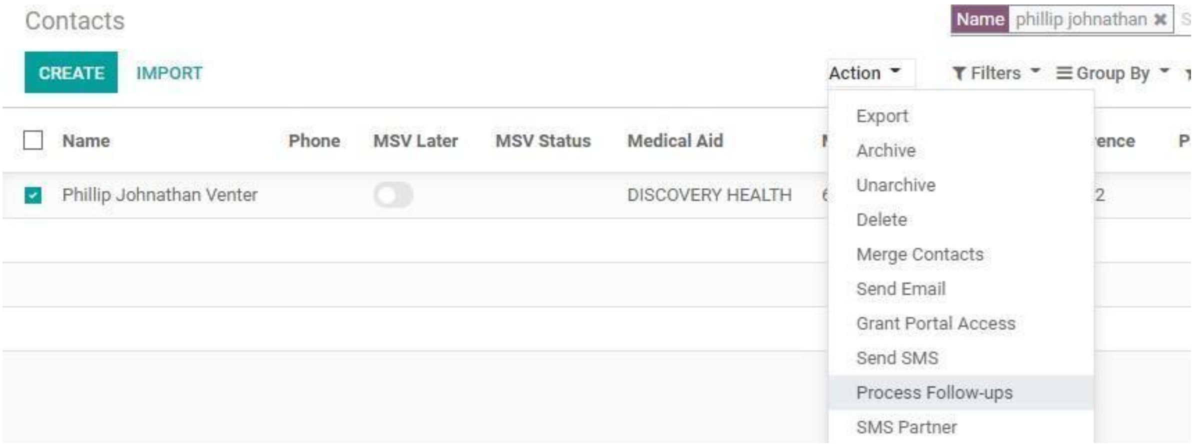
Here you can send a personalised SMS to a patient.
E.g. - Directions or just a short reminder message



Select the contacts you want to send the SMS to
Type the message
Click on SEND

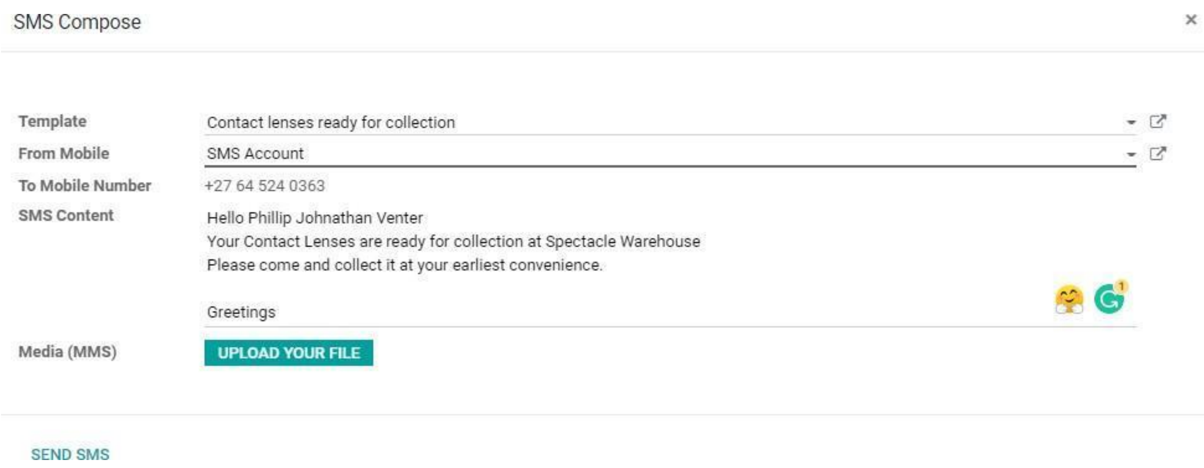
Process Follow-ups

Follow-ups are Statements that are sent out Automatically – You can, however, send it manually by clicking on Process Follow-Ups



SMS Partner

Here you will be able to send the SMS templates created.



Choose the template you want to use
From Mobile – The SMS Account setup
To Mobile number - The number saved on the customer selected
SMS content – This will be the SMS saved under templates
Media (MMS) - You can Upload an image or Video
Send SMS

Mark to MSV Later

This can be set on accounts where you don't have all the patient information to validate with MSV

Remove MSV Later

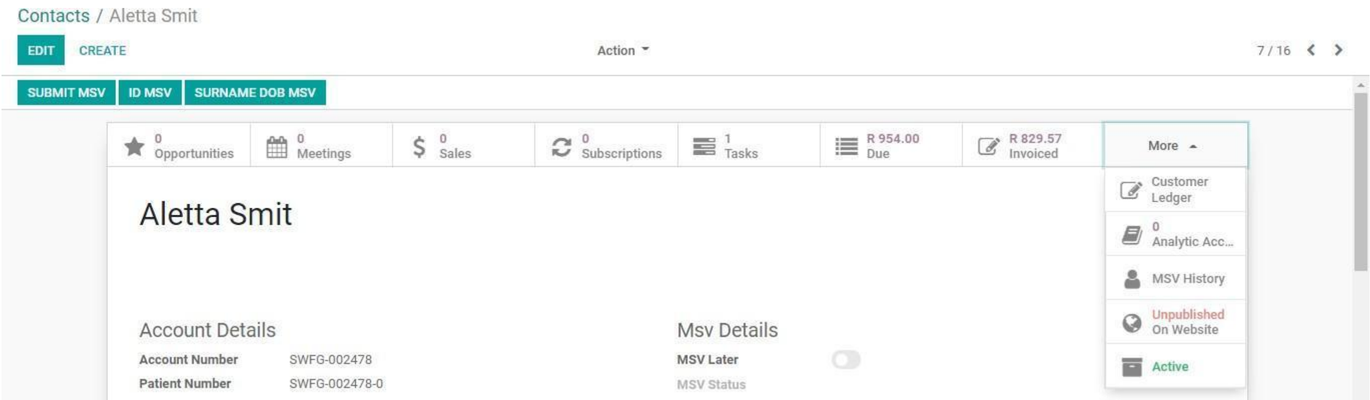
When you have obtained the information required to process MSV, you can remove the MSV Later option

Id MSV – To do a MediSwitch validation of the ID only.

Surname Dob MSV – To do a MediSwitch validation on the surname and date of birth only.

Partner Activity statement – To send a statement to the patient.

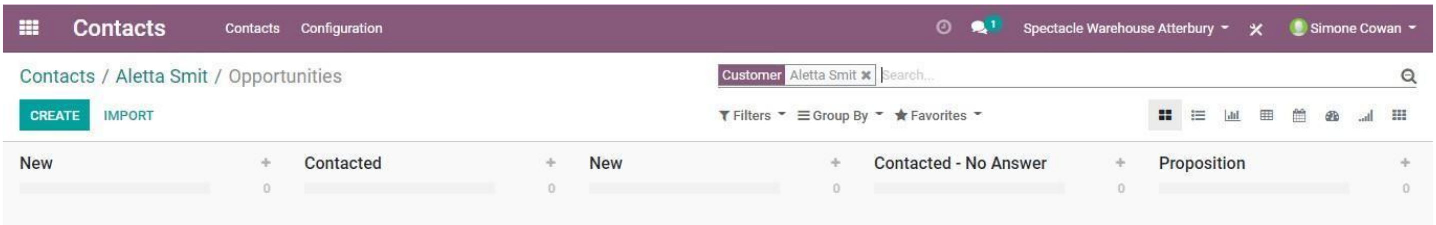
When you go into the contact – You can get the following information:



Contact Options

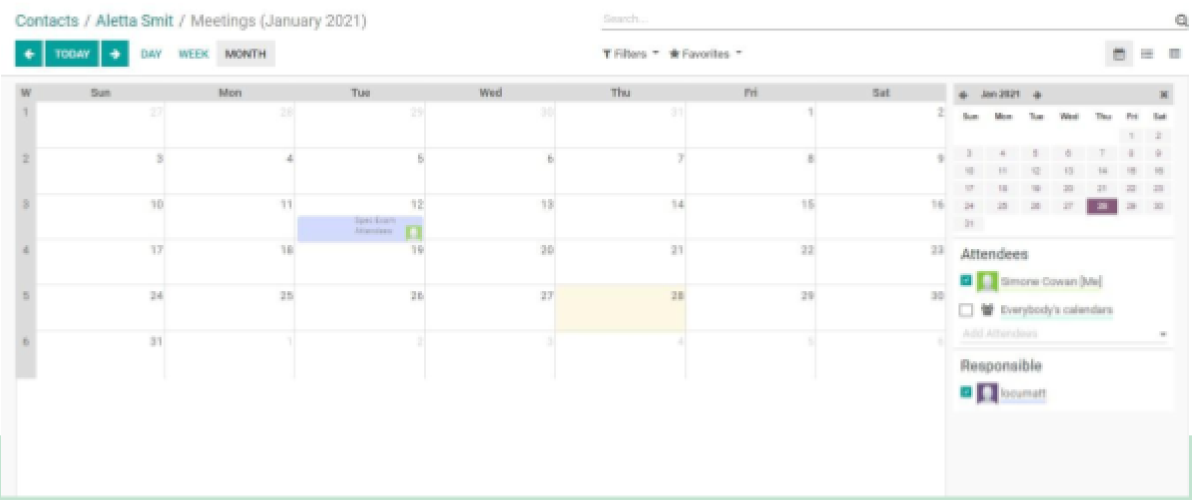
Opportunities

You can create an opportunity in the CRM module for this patient here



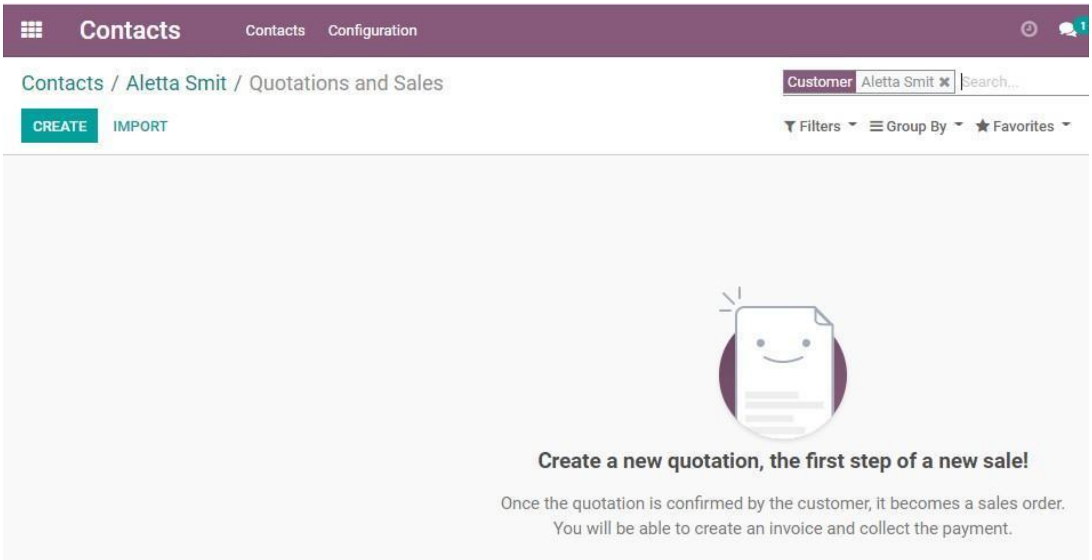
Meetings

This will show the patient's previous appointments



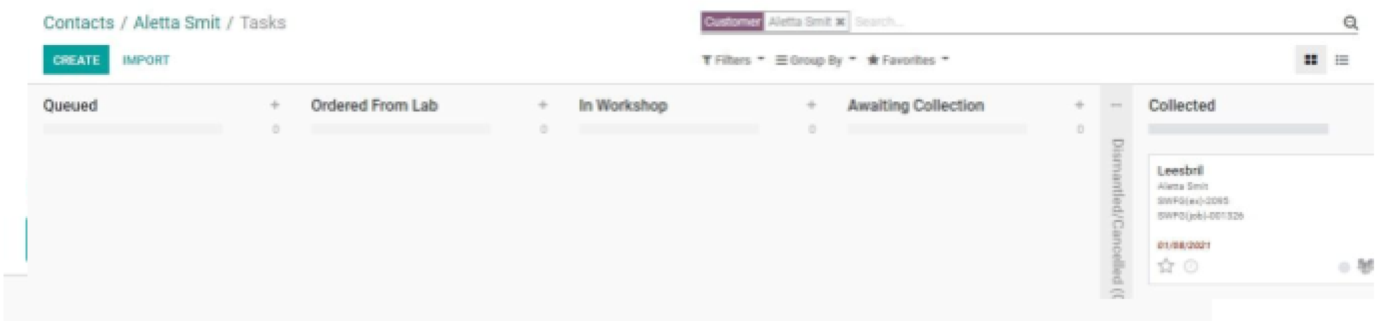
Sales

Here you will be able to view quotations and sales orders



Tasks

This will show if you have any orders in the Job queue.



Opportunities – CRM linked module

Meetings – Will show any exam the patient attended or booked

Sales - To show if there are any quotes on the patient's name

Invoiced - Will view the invoices on the customers' accounts

Analytic Account - TBC

MSV History – You will be able to see if the patient details have been validated via MSV previously.

Due – TBC - Will be able to see if there are any outstanding balances here without accessing the partner ledger