

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:

	Search	Q
Action -	▼ Filters - ≡ Group By - ★ Favorites -	1-80 / 4030 < > View list 🛛 📰 🕅
		•

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.

°	REATE IMPORT			Action ▼ Filters ▼ ≡ Gr
\sim	\sim		(CUR)	Export
	ADEWALE IFEDAPO BANJO			Archive
	ADRIAAN JACOBUS BOSMAN	012 802 1015 H		Delete
	ADRIAAN KHUN			Merge Contacts
	ADVISEUR			Send Email
	AJITH JUGDEO	012 480 1315 H		Grant Portal Access Send SMS
	ALANA TERESSA KLOPPER			Process Follow-ups SMS Partner
	ALBERT JANSE VAN RENSBURG			Send Follow-Ups Mark to Msv Later
	ALBERTUS DANIEL NICO BRUMMER	012 347 0995 H		Remove MSV Later
	ALETTA JACOBA ORFFER			Id MSV
	ALETTA SUSARAH ELISABET GROBLER	012 993 4165		Sumame Dob MSV Partner Activity Statement



Export

To export certain line items, you can filter and select all, or only select those you want to export.

HUMINT

Click on Export, once your contacts have been selected in the tick box You will get to this screen:

What do you want to do? Use data in a spreadsheet (export all data)	Expor Exc	t Format: el	
O Update data (import-compatible export)	Ocsv	r.	
Available fields		Fields to export	Save fields lis
Display Name	-	Saved exports:	- DELETE
Name # Meetings # Signatures # Tasks # Vendor Bills	ADD	Display Name Dependent Code ID Number Internal Reference MSV Later MSV Status	
Account Payable Account Receivable	REMOVE ALL	Medical Aid Medical Aid No	
Action Needed	MOVE UP	Patient Number Phone Total Baceluable	
Activities Activity State Additional info Address Type	MOVE DOWN	Total Hecenvalue	
Admin Code Administrator			

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When you want to Unarchive a patient that has been Archived Click on FILTERS -ARCHIVED

Co	ontacts					Archived X Search		
C	REATE IMPORT			▼ Filters ▼ ≡ Group		▼ Filters ▼	By * 🖈 Fa	
			MSV	MSV		My Contacts	ernal	
	Name	Phone	Later	Status	Medical Aid	Individuals	ference	
	ADRIAAN KHUN				BANKMED	Companies		
	AJITH JUGDEO	012 480 1315 H			AECI MEDICAL AID SOCIETY	Customers Vendors	VAV2059	
	Bisschops staalwerke	+27 12 804 7135				Overdue Invoices		
	Pietman Naude					of Archived		
	Public user for Spectacle Warehouse Atterbury					Archived		

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

	Contacts	Contacts	Configuration					
Con	tacts						T Archive	ed 🗙 Search.
CRE	ATE IMPORT					Action *	T Filters	Group B
						Export		
	lame		Phone	MSV Later	MSV Status	Archive		Interr
-						Unarchive		
B	lisschops staalwerke		+27 12 804			Delete		
			7135			Merge Co	intacts	
P P	tman Naude					Send Em	ail	

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

Contacts				Search
CREATE IMPORT			Action *	▼ Filters ▼ ≡ Grou
Name	Phone	MSV Later MSV Status	Export Archive Unarchive	e
BHF		0	Delete	



х

Merge Contacts

C	REATE IMPO	RT					Action -	▼ Filters ▼ ≡ Group
	Name	Phone	MSV Later	MSV Status	Medical Aid	Medical	Export Archive	
	Drivers test						Unarchive	
	Lynda Cloete				DISCOVERY HEALTH	3691853	Delete Merge Co	ntacts
	Test Supplier						Send Ema	il
~	Test Test				Private		Grant Por	tal Access
	drivers test						Send SMS	ollow-ups
-	test test						SMS Part	ner

Merge Contacts

Merge the following contacts Selected contacts will be merged together. All doo contacts from this list to avoid merging them. Destination Contact test test ID Display | Test Test test test 18,233 Test Tes × Create and Edit. 15,145 test test Add a line

MERGE CONTACTS SKIP THESE CONTACTS CANCEL

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

Send Email			×
			*
	Only records checked in list view will be used. The email will be sent for all the records selected in the list. If you want to send it for all the records matching your search criterion, check this box :		l
From	info@humint.co.za		
Recipients	Email mass mailing on the selected records.		
Subject	Subject line on the email	_	
Mass Mailing Campaign	Humint	- 2	I
Mass Mailing Name	Test mass mailing		
No threading for answers			ļ
∦ • B I <u>U</u> Ø			
Type your email here			



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

Grant Portal Acc	cess			×
Select which conta any contact's email	acts should belong to the portal in the lis I address directly in the list.	st below. The email address of each select	ed contact must be valid and unique. If necessar	y, you can fix
Contact		Email	In Portal	
Phillip Johnathan	Venter	phillip@humint.co.za		
This text is include	ed in the email sent to new portal users.			
APPLY CANC Send SMS Here	e you can send a personali	sed SMS to a patient.		
E.g.	 Directions or just a short 	reminder message		
Send SMS				×
	A sms will be sent to all the records ma	tching your current search filter, not only the	ids selected in the list view.	
Recipients	+27645240363			
Message	Type SMS message here		O	
			21 chars, fits in 1 SMS (GSM7) 🚯	
SEND Cancel				
Sele	ct the contacts you want t	o send the SMS to		
τυρε	e the message			
71				

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

Contacts					Name phillip	johnathan 🗙 S
CREATE IMPORT				Action -	▼ Filters ▼ Ξ	E Group By 🍷
Name Ph	one MSV Later	MSV Status	Medical Aid	Export Archive		ence P
Phillip Johnathan Venter			DISCOVERY HEALTH	6 Unarchive Delete Merge Co Send Ema Grant Por Send SM	e intacts ail tal Access S	2
				Process I SMS Part	Follow-ups ner	

SMS Partner

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

SMS Compose			×
Template	Contact lenses ready for collection		Ľ
From Mobile	SMS Account		\square_{i}
To Mobile Number	+27 64 524 0363		
SMS Content	Hello Phillip Johnathan Venter Your Contact Lenses are ready for collection at Spectacle Warehouse Please come and collect it at your earliest convenience.		
	Greetings	😤 G	
Media (MMS)	UPLOAD YOUR FILE		

SEND SMS

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:

E			Action -				
ID MSV SURNAM	E DOB MSV						
✿ Opportunities	0 Meetings	\$ ⁰ Sales	C ⁰ Subscriptions	Tasks	R 954.00 Due	R 829.57 Invoiced	More 🔺
Alatta C	m it						Customer Ledger
Aletta S	mit						Analytic Acc
							MSV History
Account Deta	ails			Msv Details			On Website
	0000000000000			MSVLator			

Contact Options

Opportunities

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

EContacts	Contacts Configuration		🕘 🔍 1 Spectacle Warehou	se Atterbury - 🗙 🌔 Simone Cowan -
Contacts / Aletta Smit	/ Opportunities		Customer Aletta Smit 🗙 Search	Q
CREATE IMPORT			▼ Filters ▼ ≡ Group By ▼ ★ Favorites ▼	III h. @ 🆄 🎟 hi III
New	+ Contacted	+ New	+ Contacted - No Answer +	Proposition +
	0	0	0	0

Meetings

This will show the patient's previous appointments



Sales

Here you will be able to view quotations and sales orders

Contacts Configuration	Ø 🔍					
Contacts / Aletta Smit / Quotations and Sales	Customer Aletta Smit X Search					
CREATE IMPORT	▼ Filters ▼ ≡ Group By ▼ ★ Favorites ▼					
c	reate a new quotation, the first step of a new sale!					
Once t	he quotation is confirmed by the customer, it becomes a sales order. You will be able to create an invoice and collect the payment.					

Tasks

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

Contacts / Aletta Smit / Tasks			Costomer Aletta Smit x Search ▼ Filters * ≡ Group By * ★ Favorites *					Q			
							=	=			
Queued	:	Ordered From Lab		In Workshop	÷	Awaiting Collection	o	I Dismantled/Cancelled (C	Collected		- N

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