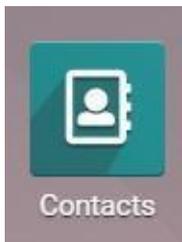




Training Manual

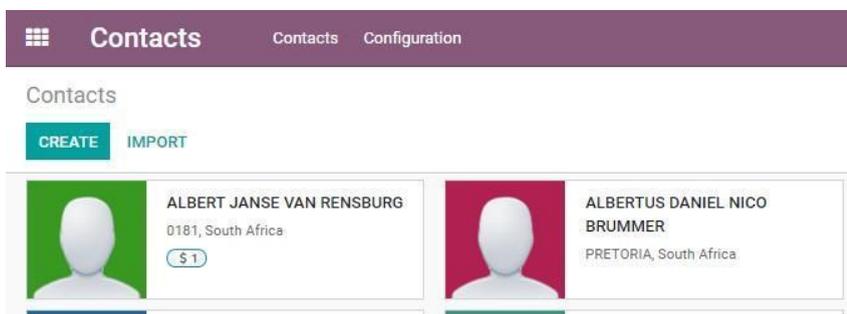
Humint O Lite
Version 16

Contacts



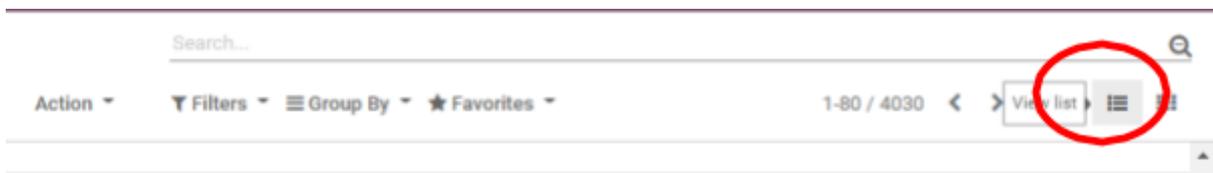
When you open this module, all of your contacts will be listed.

Vendors and Customers

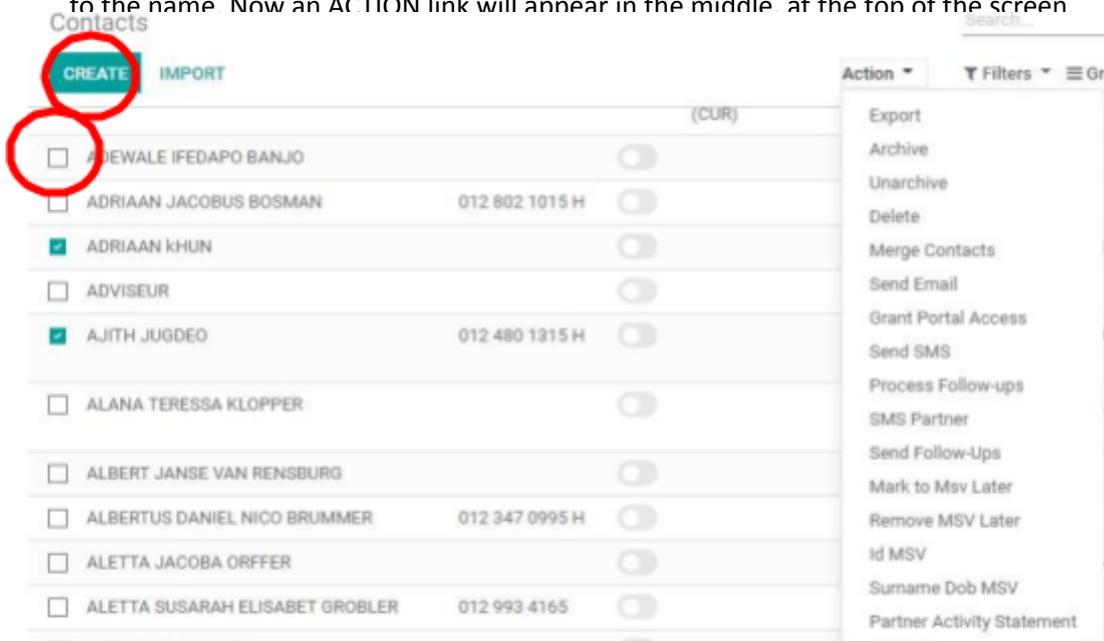


You can create a customer by clicking on CREATE

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



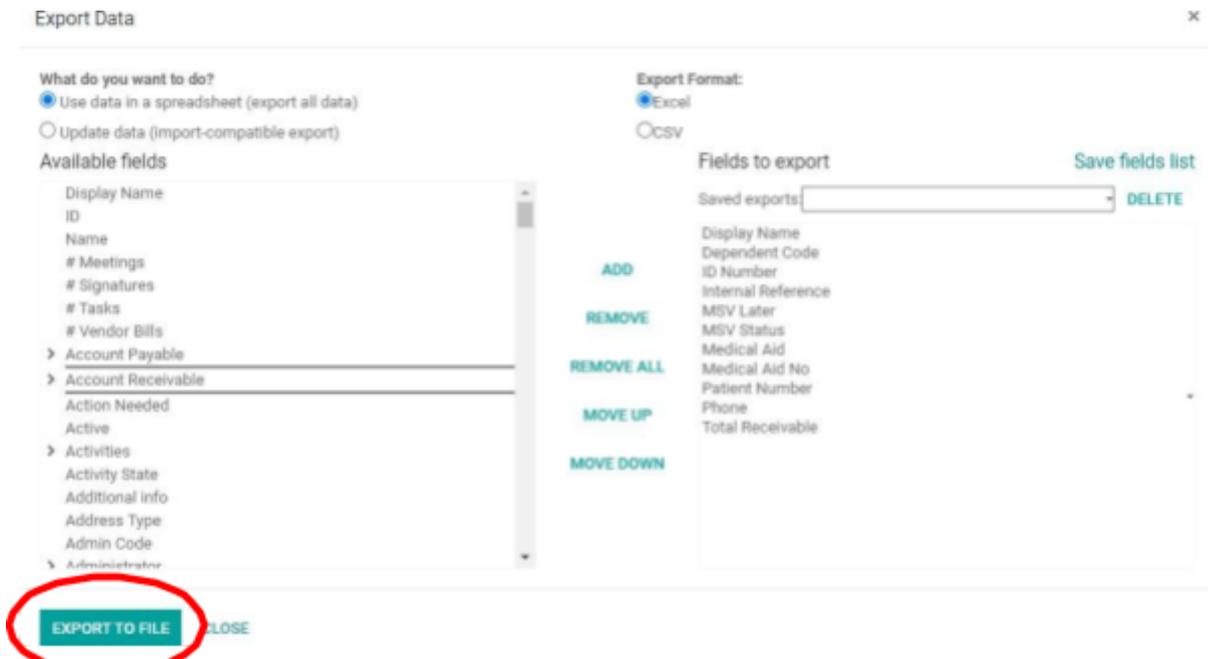
Actions

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.

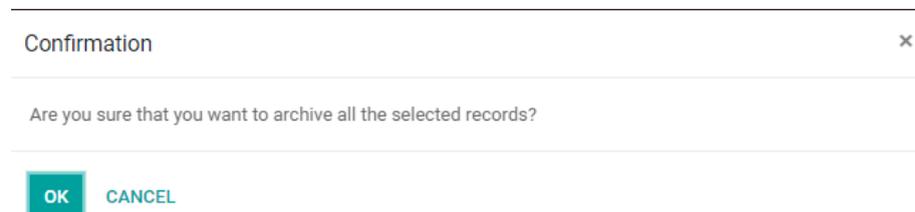
Add or Remove field by clicking on ADD or REMOVE

Archive

When you want to make a patient dormant, you can archive the account.

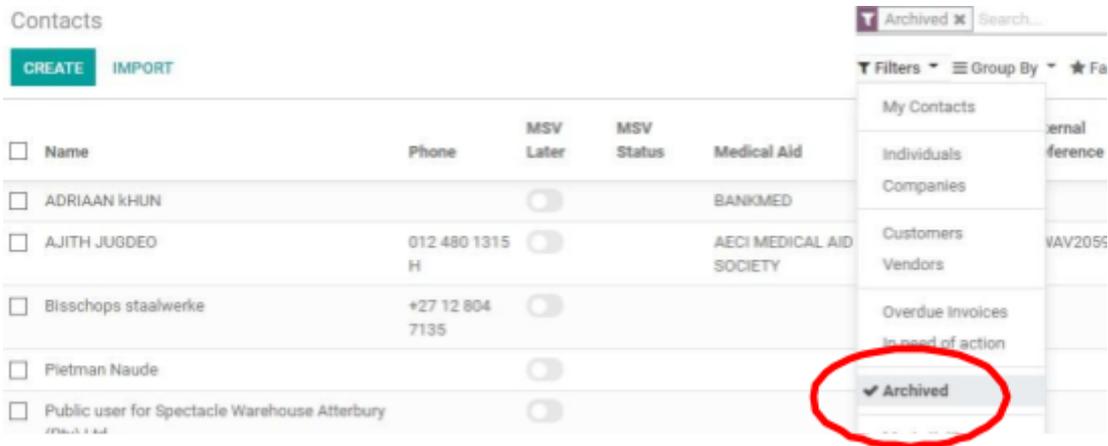
Select the contact in the tick box and the click ARCHIVE

Once this error message comes on, you click OK.

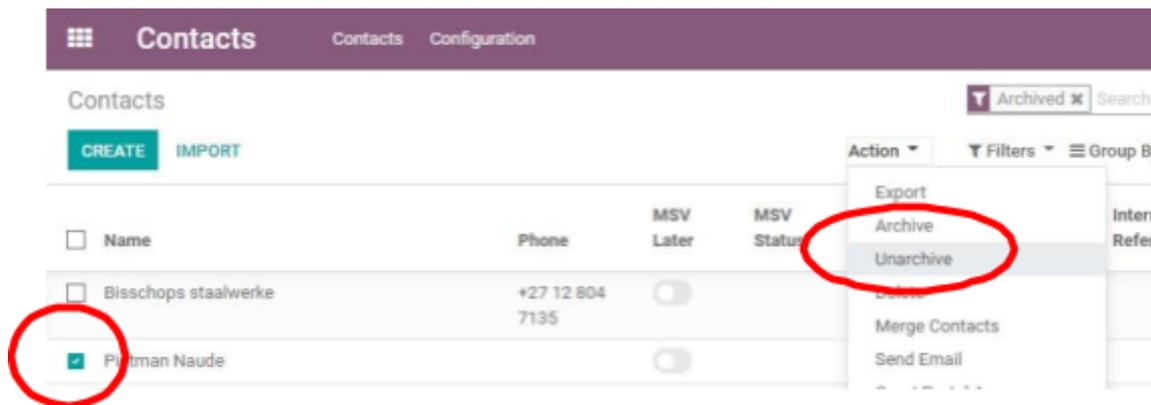


Unarchive

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

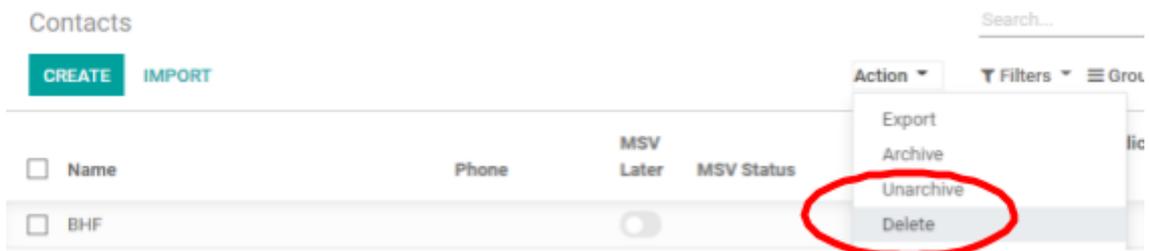


Then select the contact in the tick box and click on Unarchive.



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

Contacts Name test x Search

CREATE IMPORT

<input type="checkbox"/>	Name	Phone	MSV Later	MSV Status	Medical Aid	Medical
<input type="checkbox"/>	Drivers test		<input type="checkbox"/>			
<input type="checkbox"/>	Lynda Cloete		<input type="checkbox"/>		DISCOVERY HEALTH	3691853
<input type="checkbox"/>	Test Supplier		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Test Test		<input type="checkbox"/>		Private	
<input type="checkbox"/>	drivers test		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	test test		<input type="checkbox"/>			

Action ▾
 Export
 Archive
 Unarchive
 Delete
Merge Contacts
 Send Email
 Grant Portal Access
 Send SMS
 Process Follow-ups
 SMS Partner

To merge contacts will combine the two contacts together.

Merge Contacts x

Merge the following contacts

Selected contacts will be merged together. All documents linked to one of these contacts will be redirected to the destination contact. You can remove contacts from this list to avoid merging them.

Destination Contact: test test x

ID	Display
18,233	Test Test
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 x

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:

From: info@humint.co.za

Recipients: Email mass mailing on the selected records.

Subject: Subject line on the email

Mass Mailing Campaign: Humint x

Mass Mailing Name: Test mass mailing

No threading for answers:

Type your email here

- 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

Grant Portal Access ✕

Select which contacts should belong to the portal in the list below. The email address of each selected contact must be valid and unique. If necessary, you can fix any contact's email address directly in the list.

Contact	Email	In Portal
Phillip Johnathan Venter	phillip@humint.co.za	<input type="checkbox"/>

This text is included in the email sent to new portal users.

APPLY
CANCEL

Send SMS

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

Send SMS ✕

A sms will be sent to all the records matching your current search filter, not only the ids selected in the list view.

Recipients	+27645240363
Message	Type SMS message here

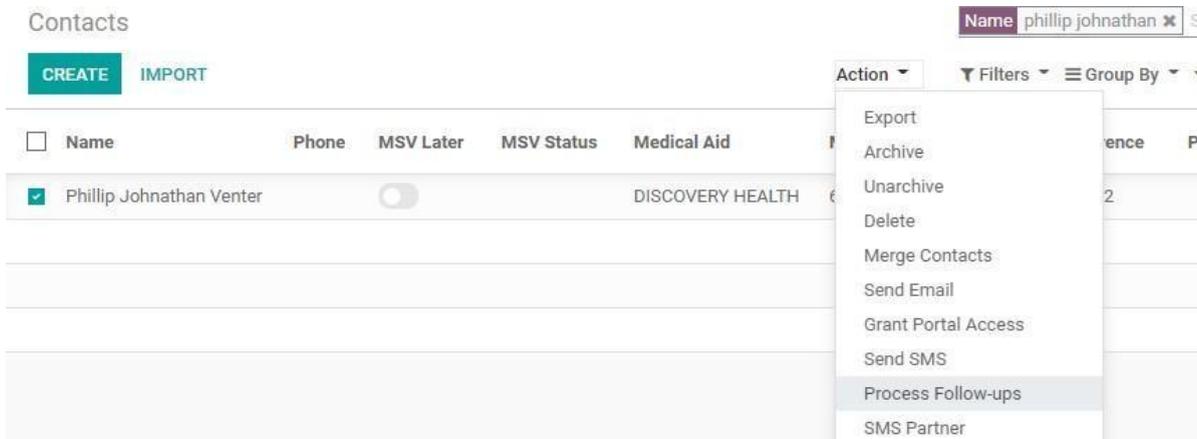
✔
21 chars, fits in 1 SMS (GSM7) ⓘ

SEND
Cancel

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

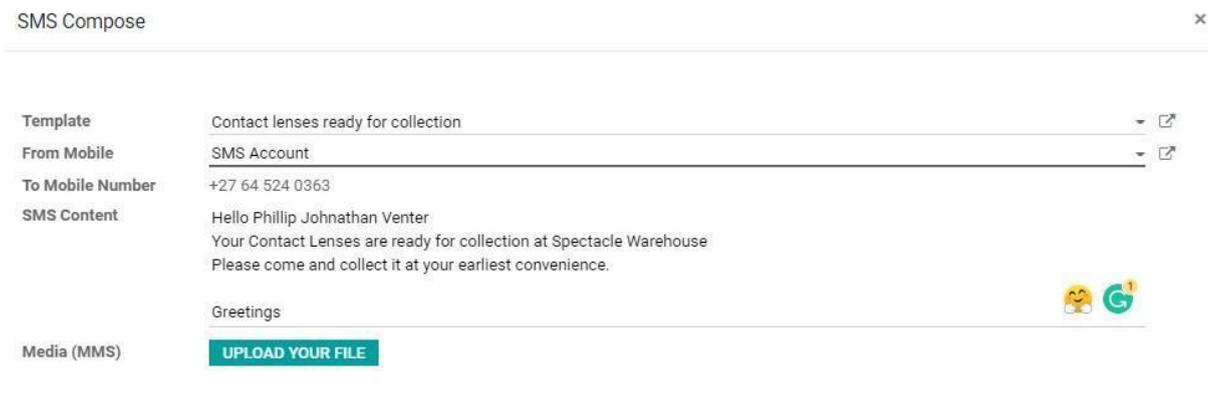
Process Follow-ups

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.



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:

Contact Options

Opportunities

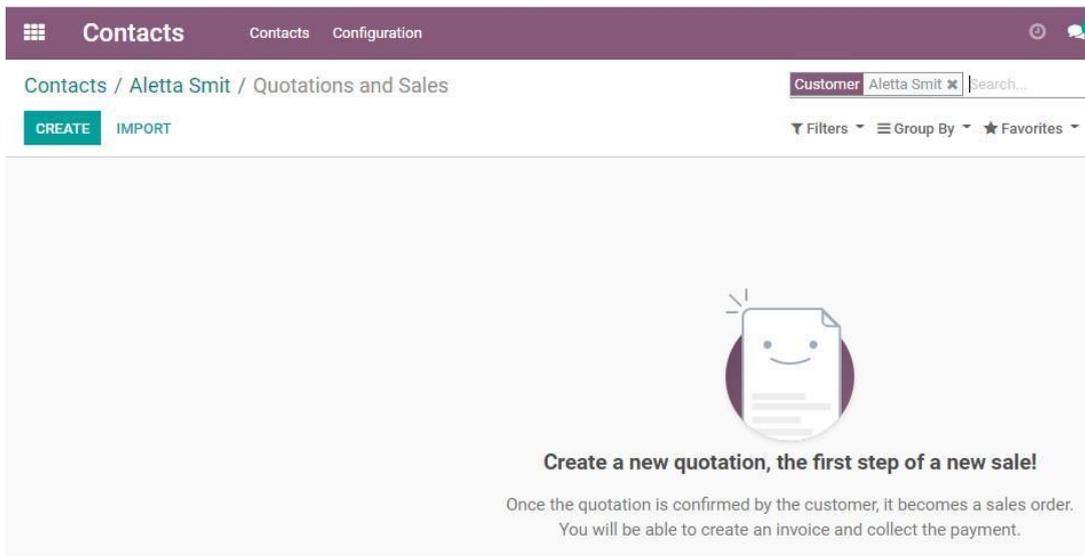
You can create an opportunity in the CRM module for this patient here

Meetings

This will show the patient's previous appointments

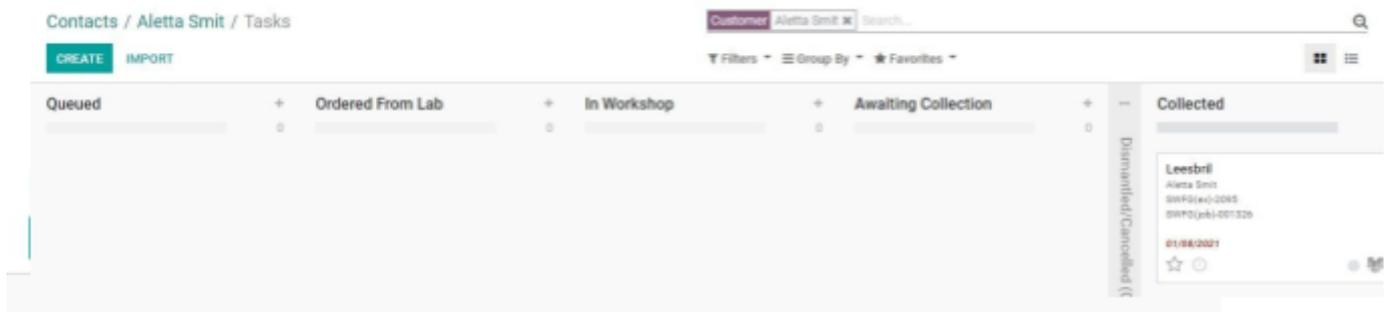
Sales

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