

BUSINESS MODEL SOFTWARE

Create a Campaign



Send to Webpage Show Messag

Delete

schedule eve

Save

+

Save

Integrations: Domain

Go to 'Settings' Tab On your home page, click the 'Settings' tab

at the top tool bar.





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Global Settings —— Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.

Personal Settings	>			
Global Settings	>	Global Settings		>
Payroll Settings	>			
Security	>			
Lists	>		↓ ·	
Advanced	>			~
Tools	>	Global Settings		·
		Software Configuration		
		Integrations		
		Offices	Integrations	
		Terminology		
		Payment & Subscription Settings		
		Promo Code		

Click on 'Domain'

- When the Integrations page open, click on the 'Domain' option under Communication.
- A Domain page will open up. Click on 'Add Domain'.

Integrations		×	
Communication			
Phone			
Text			
Fax			
Email			
Domain			
		_	
Banking/Electronic transactions download			
Bank Link			
Setup Stripe Connect			Domain
			Domain
External			
Media			
		1	↓ · · · · · · · · · · · · · · · · · · ·
Payroll			
	Domain		×
			+
	Summary		Add Domain
	goodlooking.com		Verify Domain
	Primary Account		-
			Add Domain



Complete the Form

- Fill out the required fields with the domain information.
- Don't forget to click 'Submit" on the bottom right of the form.

Domain		×		
Summary	+ Add Domain			
1. Register a Domain with a DNS provider 2. Domain Name				
Cancel	Sul	omit	\rightarrow	Submit

Integrations: Claims Clearinghouse

Schedule

Plan of Care

QA Office

Employee

n Patient



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Go to 'Settings' Tab

• On your home page, click the 'Settings' tab at the top tool bar.



<u>Global Settings</u> — Integrations

• Click "Global Settings" in the list so a drop down opens.

A Home Messages

• Click the 'Integrations' option.

Personal Settings	>			
Global Settings	>	Global Settings		>
Payroll Settings	>			
Security	>			
Lists	>		+	
Advanced	>	Global Settings		~
Tools	>			
		Software Configuration		
		Integrations Offices	Integrations	
		Payment & Subscription Settings		
		Promo Code		

Add a Clearinghouse

- When the Integrations page opens, click on the '+' to the right of Clearinghouses.
- A form will open.

tegrations				×
Communication		Clearinghouses	+	
Phone		Availity		
Text		Waystar		
Fax				
Email	Clearinghouses			-
Bank Link Setup Stripe Connect	Avallity Waystar			
External				
Media				
Payroll				

<u>m</u> Finance \$ Payroll Reports

C Travel Mode

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Settings

Cettings

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? Help



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Complete the Form

- Fill out the required fields with the Submitter and Electronic Claims information.
- Don't forget to click 'Submit" on the bottom right of the form.

X	×	
Clearinghouses	Electronic Claims Information	
Submitter Information	Integrated Submitter:	
Code:		~
	ISA06 #:	ISA06 Type:
Name:		
Address 1:	Submitter ID (GS 02):	Submitter Primary ID:
Address 2:	FTP ID:	FTP Password:
City: State: Zip:	kierstenrathke@gmail.com	
City: State: Zip:		
Contact Name:	Notes:	
Phone: Ext:		
Fax: Email:		
	Cancel	Submit

Integrations: Email



Go to 'Settings' Tab

• On your home page, click the 'Settings' tab at the top tool bar.





Global Settings — Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.

Personal Settings	>			
Global Settings	>	Global Settings		>
Payroll Settings	>			
Security	>			
Lists	>		+	
Advanced	>	Global Settings		~
Tools	>	Software Configuration		
		Integrations		
		Offices Z	Integrations	
		Terminology		
		Payment & Subscription Settings		

3

Click on 'Email'

- When the Integrations page open, click on the 'Email' option under Communication.
- An 'Email' page will open up with a summary of the existing emails linked.
- To add an account, click 'Create Account'.

In	tegrations	×	<
	Communication		
	Phone		
	Text		
	Fax		
	Email		\mathbf{X}
	Domain		
	Banking/Electronic transactions download		Email
	Bank Link		Lillali
	Setup Stripe Connect		
	External		*
	Media	Email	×
		D	+
	Payroll	Summary	Create Account
			*
		Connect Pediatrics info@connectpeds.com	\sim
			\sim
		Resumes resume@connectpeds.com	
		Recruiting recruiting@connectpeds.com	- T
		1	Create Account



Complete the Form

- Fill out the required fields with the email information and Limits settings.
- Don't forget to click 'Save' on the bottom right of the form.

Email			×		
	Summary	Create Account			
Name					
Email		۲	~		
Limit to					
User(s)					
Q Search					
Group					
Q Search					
Office					
Q Search					
					~
			Save	\rightarrow	Save



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Integrations: Fax



Go to 'Settings' TabOn your home page, click the 'Settings' tab

at the top tool bar.





Global Settings ----- Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.

Personal Settings	>			
Global Settings	•	Global Settings		>
Payroll Settings	>		•	
Security	>			
Lists	>		+	
Advanced	>	Global Settings		~
Tools	>			
		Software Configuration		
		Integrations		
		Offices	Integrations	
		Terminology	_	
		Payment & Subscription Settings		
		Promo Code		



Click on 'Fax'

- When the Integrations page open, click on the 'Fax' option under Communication.
- A 'Fax Accounts' page will open up. Click 'Add Fax Account' on the far right above 'Office(s)'





Complete the Form

- Fill out the required fields with the Fax information and input the Limits settings.
- Don't forget to click
 'Submit' on the bottom right of the form.

ADD		×
SELECT FAX COVERSHEET FILE	Choose File No file chosen	
ACCOUNT NAME*		
FAX NUMBER*		~
STATUS	ACTIVE	~
LIMIT TO		
USER	SELECT A USER	
USER GROUP		~
OFFICE	{{\$selectMultiple.getPlaceholder()}}	

SUBMIT CLOSE

Integrate Phones



Go to 'Settings' Tab

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Global Settings ----- Integrations

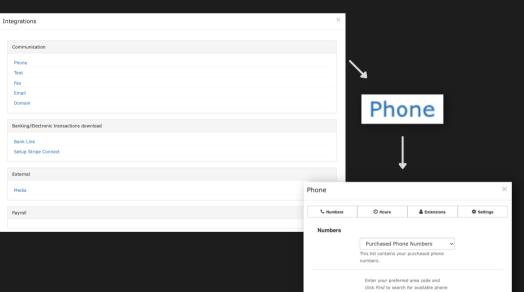
- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.

Personal Settings	>			
Global Settings	>	Global Settings		>
Payroll Settings	>			
Security	>			
Lists	>		+	
Advanced	>	Global Settings		`
Tools	>	oloui Settinga		
		Software Configuration		
		Integrations Offices	Integrations	
		Terminology	Integrations	
		Payment & Subscription Settings		
		Promo Code		



Click on 'Phone'

- When the Integrations page open, click on the 'Phone' option under Communication.
- A 'Phone' page will oper up.



For toll-free numbers, enter 877, 866, 855 or 844.

Area Code

Find



Complete the Form

- Fill out the required fields with the lead's information.
- Don't forget to click 'Save' on the bottom right of the form.