Office Tools Professional®

Client Portal User Guide

Guide to the proper setup and use of the Office Tools Client Portal and its integration within Office Tools Practice Management

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Before you begin:

Use of the Client Portal requires Office Tools Professional 2012.244 or newer, a local email client (such as Outlook) and a modern internet browser: Internet Explorer 9.0+, Google Chrome 16.0+, Mozilla Firefox 5.0+, or Apple Safari 5.0+. Java and Java Script must be enabled, 256 bit encrypted browser settings with SSL 2.0 or 3.0 are required. Local firewalls must allow for use of SSL (https) communication.

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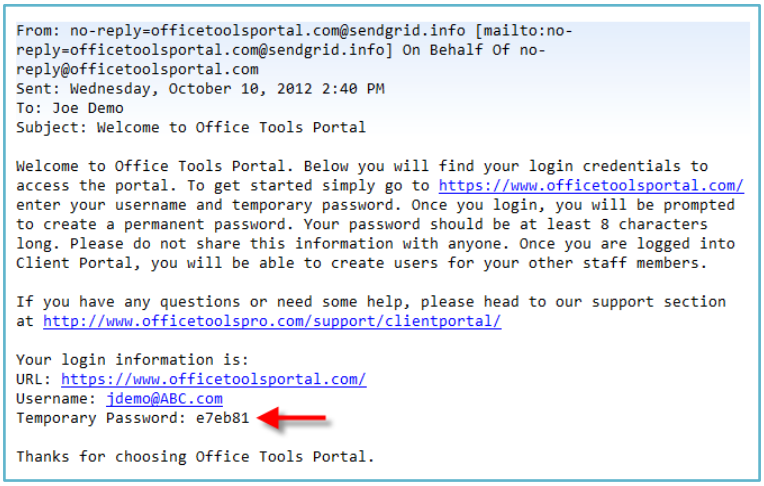
Basic Setup

Overview: This section will show you how to enter your new Portal account number, log into the Portal website, change temporary passwords, set up the initial admin staff member, and add new staff members to the portal. It will also explain how to add clients to the portal, and how to send and receive documents.

Portal Admin Setup

After purchasing the Client Portal, you will receive two emails, one containing your Client Portal account number, and one containing your login information. These will be sent to the email address specified on your order. For later steps, it's important that the user associated with this email is a system admin in Practice Management. If they are not, please upgrade their user rights for the duration of the Portal setup process, after which they can be downgraded.



From: no-reply=officetoolsportal.com@sendgrid.info [mailto:no-reply=officetoolsportal.com@sendgrid.info] On Behalf Of no-reply@officetoolsportal.com
Sent: Wednesday, October 10, 2012 2:40 PM
To: Joe Demo
Subject: Welcome to Office Tools Portal

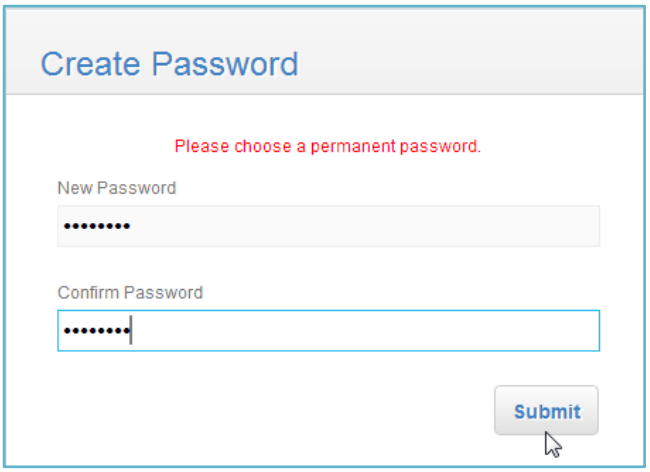
Welcome to Office Tools Portal. Below you will find your login credentials to access the portal. To get started simply go to https://www.officetoolsportal.com/ enter your username and temporary password. Once you login, you will be prompted to create a permanent password. Your password should be at least 8 characters long. Please do not share this information with anyone. Once you are logged into Client Portal, you will be able to create users for your other staff members.

If you have any questions or need some help, please head to our support section at http://www.officetoolspro.com/support/clientportal/

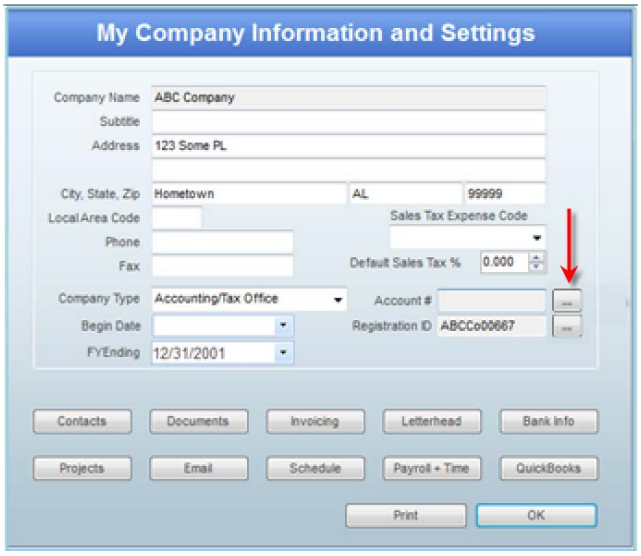
Your login information is:
URL: https://www.officetoolsportal.com/
Username: jdemo@ABC.com
Temporary Password: e7eb81

Thanks for choosing Office Tools Portal.

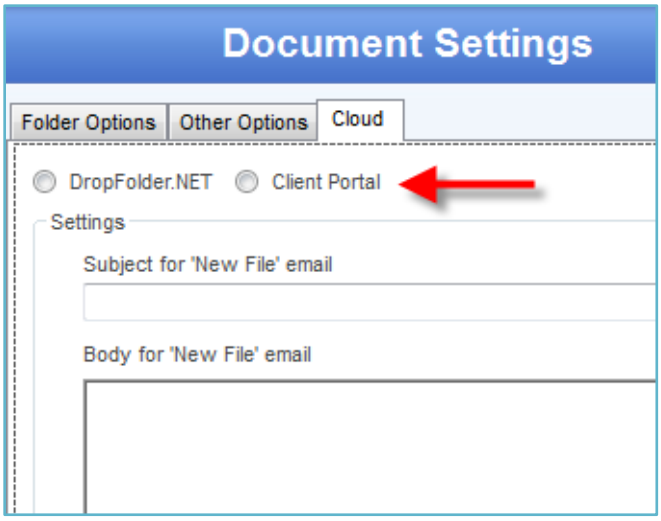
The first step is to setup your Portal Admin user account by logging on to the Portal website (www.officetoolsportal.com) using the temporary password that was emailed to you. When you first login you will be prompted to create a permanent password.



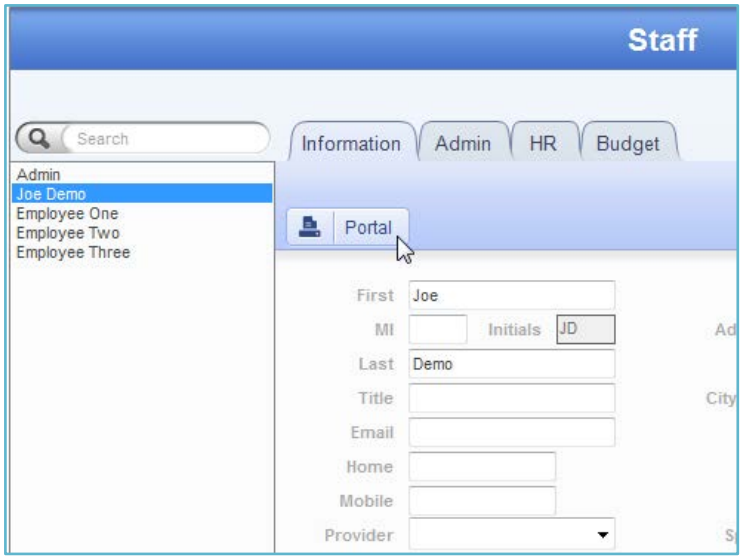
Once you've created your permanent password, you'll see your Portal website homepage and you'll be ready for step two, activating your portal account within Practice Management (for more info on customizing your Portal website see page 24).



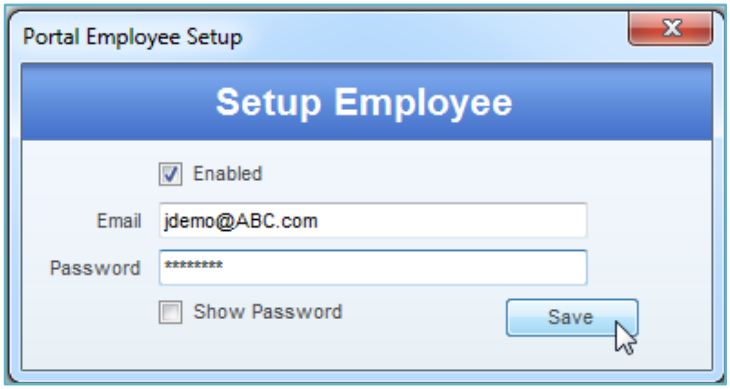
Login to Practice Management and from the tool bar at the top of the main window select Setup>My Company>Information and Settings. In the "My Company Information and Settings" window, click the ellipses button next to the Account # field. This will bring up a separate window in which you can enter the ten digit account number that was emailed to you. Once you enter the account number and click OK, Practice Management will have to restart.



After the program re-launches, return to "My Company Information and Settings" and select the Documents button, bringing up the Document Settings window. Click the Cloud tab and select the "Client Portal" radio button. The Client Portal will now be activated within Practice Management. Next you'll configure your staff settings to allow your employees to access the portal from within Practice Management.



The first staff member you need to setup is yourself (the user whose email was just used to login to the Portal website). The process will be the same for subsequent staff members. Within Practice Management from the toolbar at the top of the screen select Setup>Staff>Information. In the following window, select yourself from the staff list on the left, and then click the "Portal" button. In the "Setup Employee" window, click the "Enabled" checkbox, enter the email address you used to login to the website, and the password you just created.

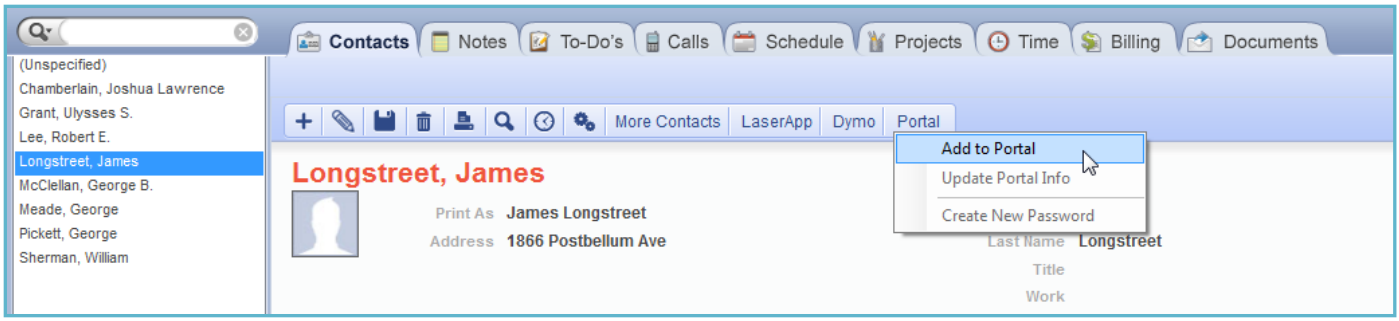


Once you have setup yourself, you may add new employees by repeating the above process (select the desired employee, click the Portal button, and enter their email and password). When adding additional staff members, the password you enter will be their permanent password. If any staff member ever changes their password on the website, they need to immediately change it inside Practice Management, or else they will not be able to use any of the portal related features.

Note: The Portal password and the password you use to login to Practice Management (if any) are not related. They do not need to be the same. For every Practice Management user utilizing the Portal, the password they use to login to the website must be the same as the password entered in the "Portal Employee Setup" window.

Syncing Contacts to Portal

Select the desired client from the contact list on the left side of the main window in Practice Management. Make sure the contact has a current, valid email address before proceeding. This email address is where they will receive their temporary password and notifications that you've uploaded files to them.



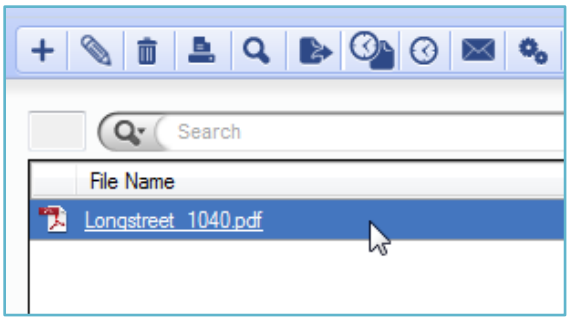
Once you've confirmed the clients email, click the Portal button on the Contacts Tab and select "Add to Portal" from the dropdown menu (alternatively you can go to the Documents Tab, click the Share button from the toolbar, and then "Sync Client to Portal" from the dropdown). A message will appear stating that "You have portal reminders ready to be sent," and you'll be able to choose whether or not to "send them now." A portal reminder is an email to the new client with their temporary password and instructions on how to logon to the Portal website. If you select yes, another window will appear in which you confirm your selection—you'll also have the option to preview the email being sent to your client. If you select No, you'll be prompted again when you logout of Practice Management.

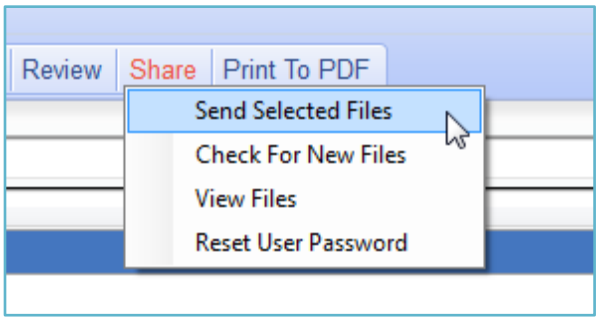
After you send the reminder your client will receive an email with a link to the Portal website and their temporary password. Once they logon to the website they'll be prompted to create a permanent password.

WARNING: Once a client is synced to the Portal, take care when changing their email address within Practice Management. If you change the email address of a client that is synced to the Portal you will have to re-sync them with the new email as though they were a new client. Previously uploaded files will not be available on their new Portal account. If you change a contact's email by accident, don't worry, nothing will be deleted from the Portal, all you have to do is replace the original email in the clients contact form within Practice Management and again, re-sync the client. Re-syncing the original email address will not reset their password, erase anything, or send them a notification—it simply reestablishes the connection between the Portal and Practice Management for that client.

Sending Files

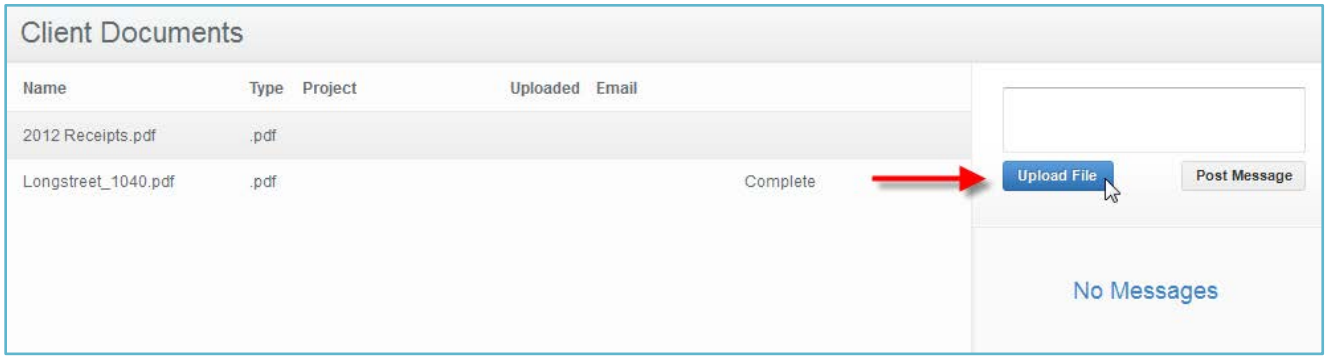
To send a file to a client that has been synced to the Portal, select the client form the contact list, got to the Documents Tab, select the desired file, then click Share>Send Selected Files. You can also right click on a highlighted file and select "Send to Client Portal" from the context menu.





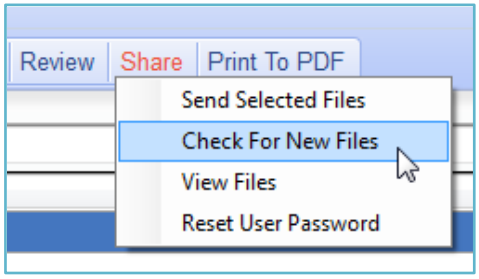
This will bring up the File Transfer Queue, which will tell you the status of the upload, and when it's completed. Upon completion you'll be prompted to send a reminder to your client letting them know a new file has been uploaded to them. If you decline, you'll be reminded when you logout of Practice Management.

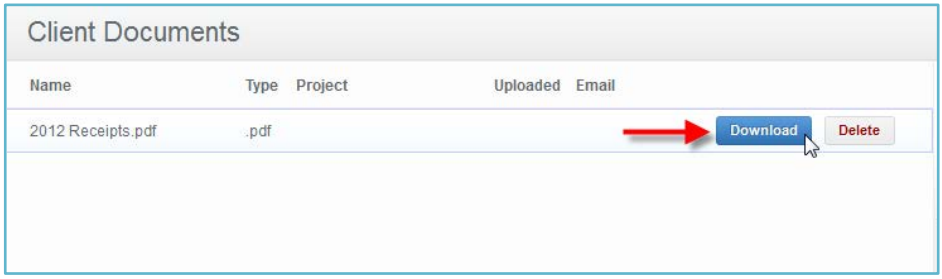
If you want to upload a file from your computer without pulling it into Practice Management first, all you have to do is click Share>View Files. This will bring up the Client Documents window, on the right side of which there's an "Upload File" button. Clicking this button will allow you to browse for the desired file wherever it may be on your system.



Receiving Files

When a client sends you a file through the Portal, it's easy to download it directly into Practice Management. First, you'll receive an email notifying you when one of your clients uploads a new file. Then all you have to do is navigate to that client within Practice Management, go to the Documents Tab, and click Share>Check For New Files.





This will bring up the Client Documents window, displaying only files recently uploaded by the client. Click download and the file will be pulled directly into Practice Management and appear in the appropriate clients document list.

Selecting "View Files" will give you a list of all the files associated to that particular client that are currently on the Portal—both those uploaded by you, and ones they have uploaded. All files can be downloaded or deleted from the Portal through this window.

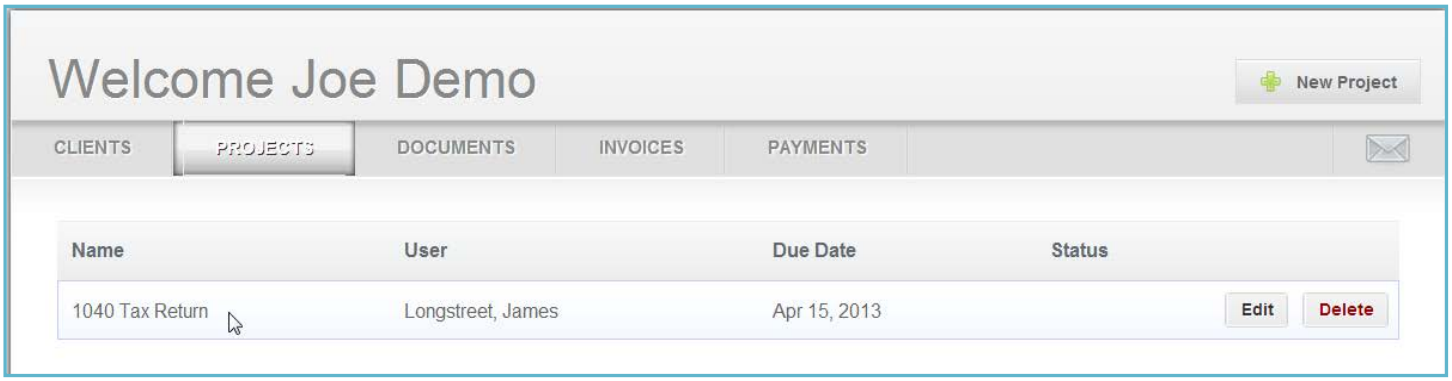
Files can be downloaded through the Portal website by navigating to the desired file and clicking the download button that appears next to it when you mouse over the file name.

Practice Management Integration

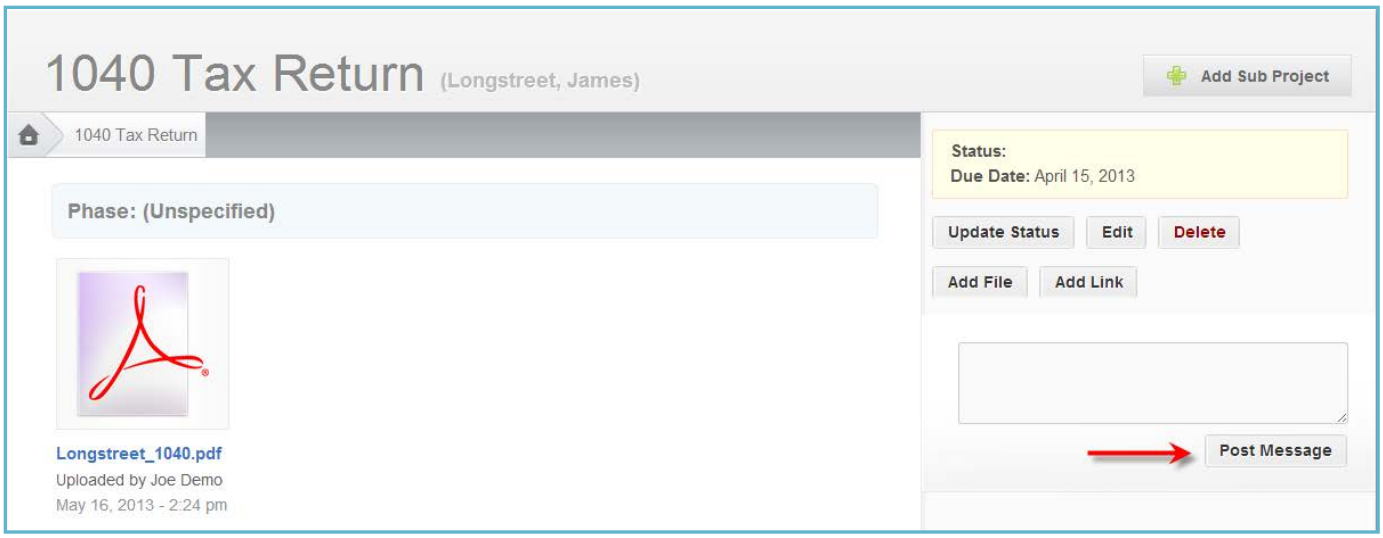
Overview: This section reviews The Client Portals integration with Projects, Invoices, and Payments within Practice Management. These features are not included in Client Portal Lite.

Projects and Categories

Projects and Categories organize client documents on the Portal the way that folders do on your hard drive. Files are stored inside projects/categories and show up as icons when browsing through a project/category.



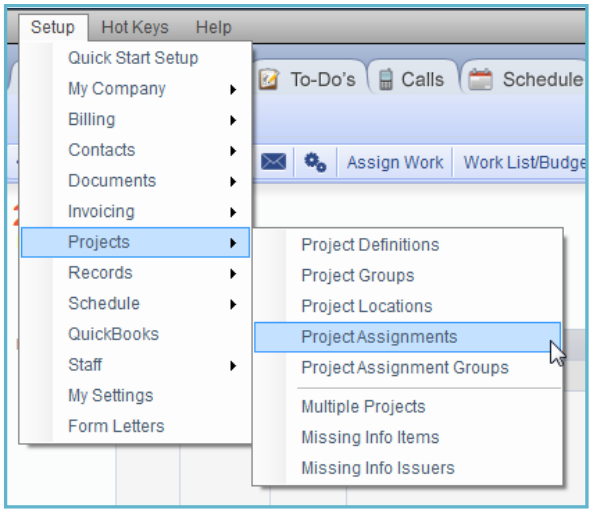
Files can be easily added to a project via the website by clicking the 'Add File' button, or via Practice Management by simply right-clicking on a file (that is associated to the project you want) and selecting 'Send to Client Portal'.

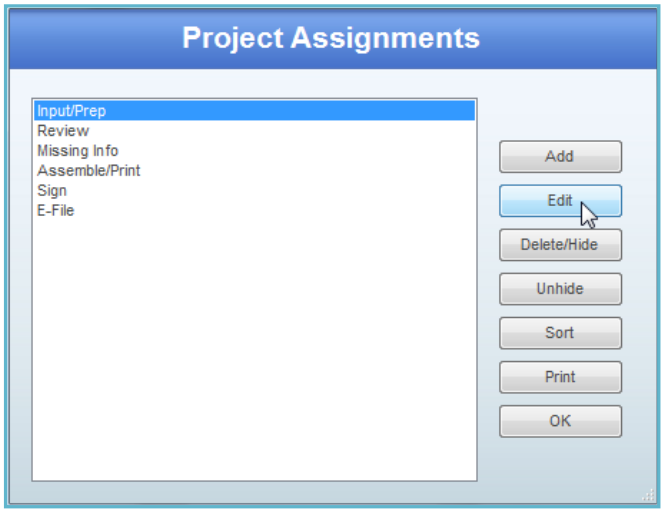


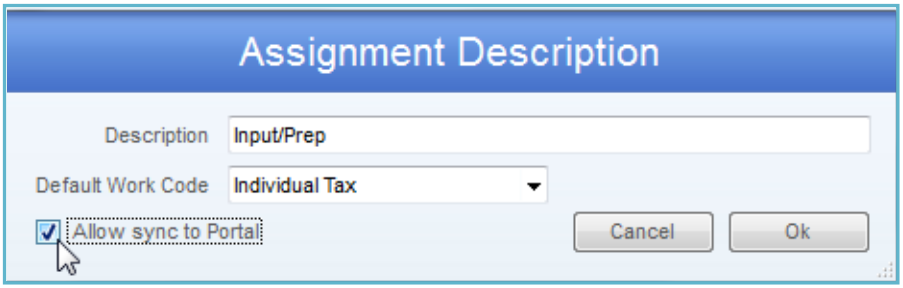
Projects not only hold files, they also hold other information that can be very useful to your clients. They contain information pertaining to the current status of a project, expected completion date, and even messages back and forth between you and your client.

Messages can be passed back and forth between you and your clients easily using the web interface or the View Files window for the Portal inside Practice Management (accessed by clicking the Share button in the Documents Tab and selecting “View Files” from the dropdown).

If you have an ‘Assignment Note’ for the current assignment on the project, that note will be included as a message when that assignment is posted to the Portal.







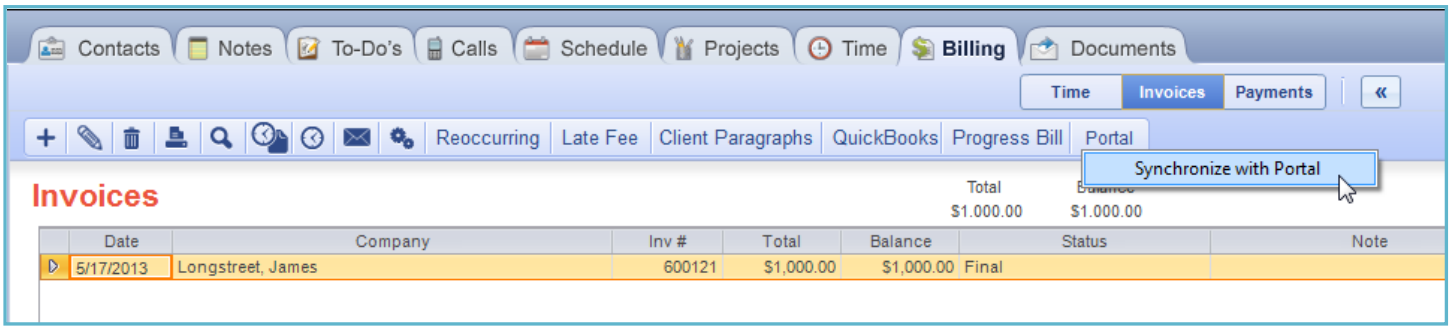
Configuring your assignments to post to the portal is very simple and straight forward. For assignments you want to be posted to the portal, you simply edit the definition for that particular assignment and check the ‘Allow Sync to Portal’ box. Once you have configured all of the Assignments, Practice Management will automatically update the project on the portal when one of the ‘Allowed’ statuses have been posted to the project.

Your client will be able to see that status underneath the small yellow box that is off to the right of the files that are listed under the project.

Invoices

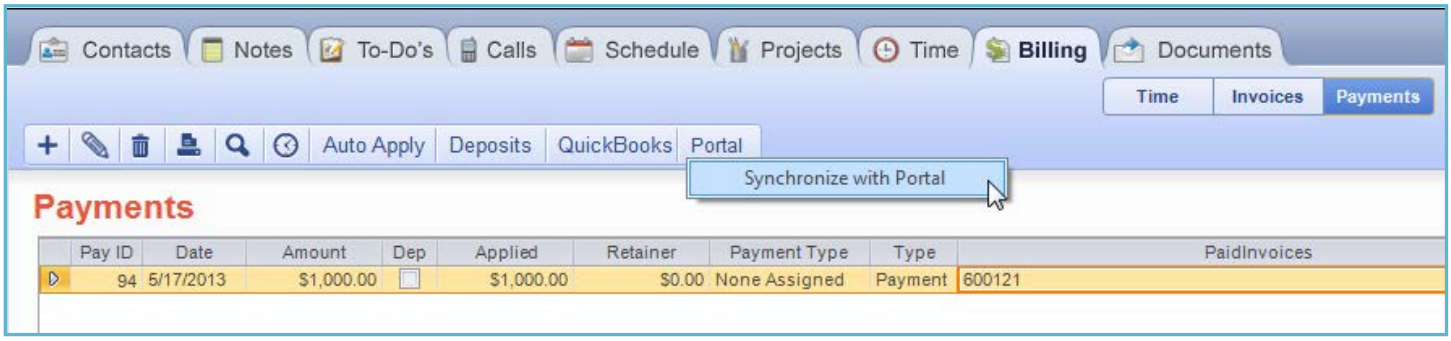
To sync an invoice from with Practice Management go to the Billing Tab, Invoices view and highlight the desired invoice by clicking on it. Then click the Portal button and select “Synchronize with Portal”.

This will allow the end user (your client) to review it from the Portal website. It will also allow them to pay the invoice if you've configured your Portal settings to allow you to receive payments (this is covered later in this guide in the Portal Website Settings section under "Billing: Receiving Payments").



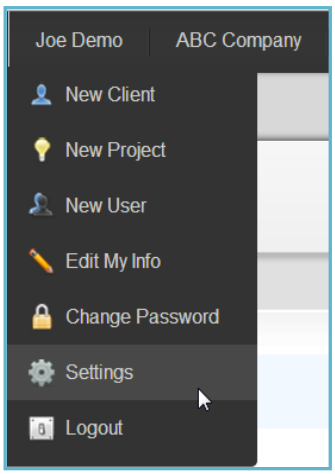
Payments

Payments sync to the Portal in the same way that invoices do. Go to the Billing Tab, Payments view and highlight the desired invoice. Then click the Portal button and select "Synchronize with Portal." This will allow the end user (your client) to review payments you've received from them.



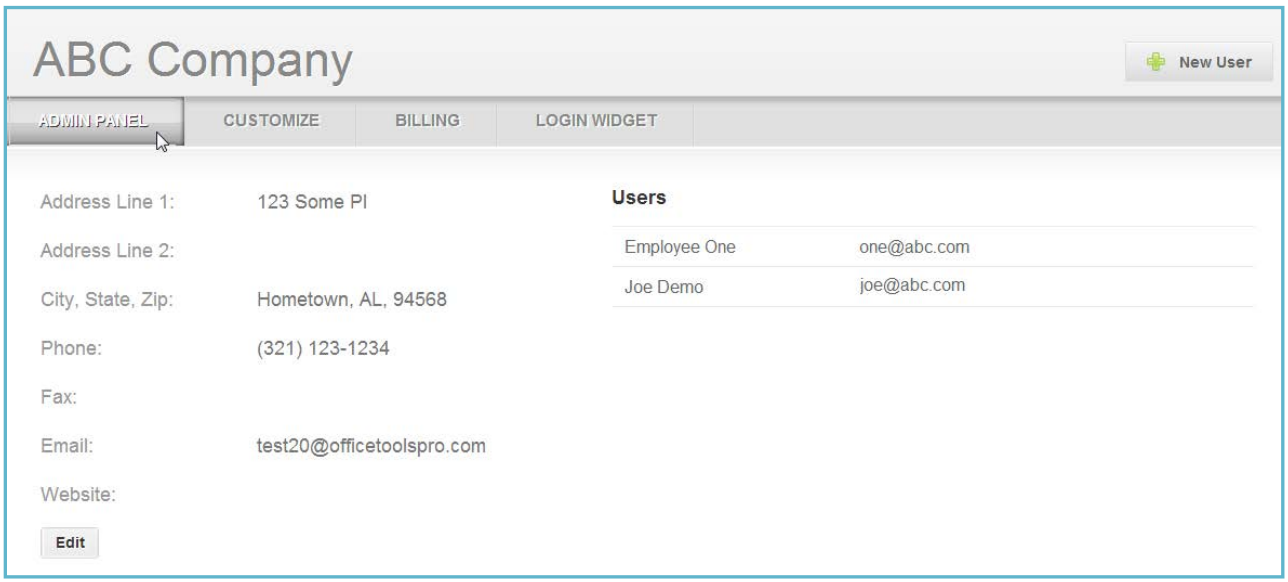
Portal Website

Overview: This section reviews features that are unique to the Portal Website, including customizations and website specific settings. To access the Settings section of the website click on the main dropdown (your user name at the top right of the site) and click the Settings button.



Admin Panel

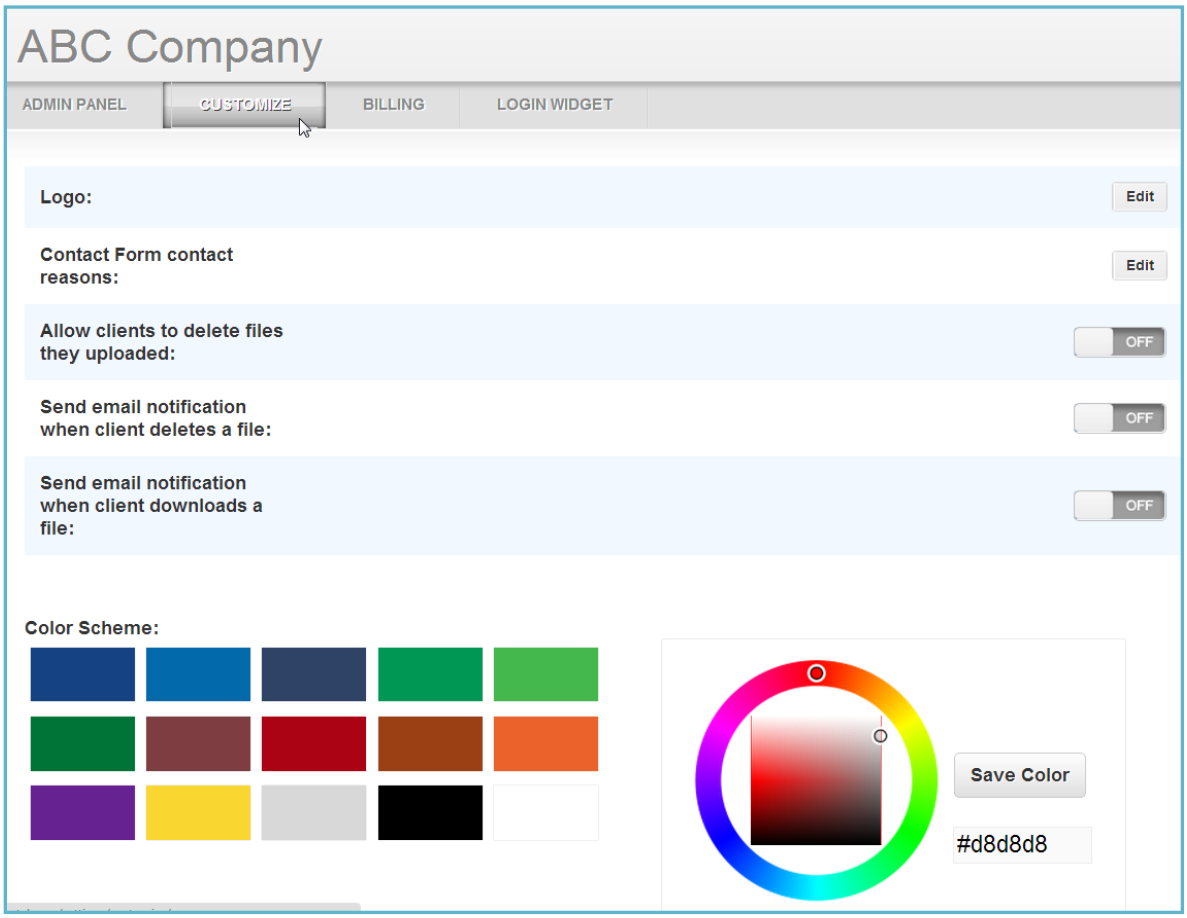
From the Admin Panel you can add or edit your company's contact information but clicking the edit button toward the bottom of the screen. You can also edit or delete users by clicking on the desired user. Please remember that if you change a user's email on the Portal website, you must also change it within Practice Management as describe in the previous section of this guide, "Basic Setup".



Customize

From the Customize Tab you can upload a logo, which will appear in top left corner of the site.

The next option is to set "contact reasons". When you're clients go to the Contact Us tab on their end they can send you messages through the Portal and you can give them pre-defined "reasons" for the message (e.g. Reschedule Appointment, Billing Question, etc.) which they can select from a dropdown menu.



The follow three options are on/off switches and self explanatory.

The last section, Color Scheme, allows you to change the background color of the site. The swatches on the left are predefined color options, or you can use the color wheel on the right to set a custom color.

Billing: Receiving Payments

The Billing Tab is where you can set up the integration with the various vendors the Client Portal supports in order to receive payments from clients electronically. You'll need to have already set up accounts with one or more of the listed vendors, and enter the appropriate accounting information into the fields provided. Once this is down your clients will be able to pay synced invoice through the Portal.

Login Widget

The Login Widget tab allows you to copy the HTML code necessary to create a login widget on your own website. You'd do this by pasting the widget code into the code of your website. This should be handled by your website designer or web master.