

Office Tools Professional®

# Demandforce Integration User Guide

Guide to the setup and proper use of the Demandforce Integration tool within Practice Management

# Table of Contents

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*Before you begin:*

You must have an active Demandforce account in order to use the Office Tools Demandforce Data Service.

The “Office Tools Demandforce Data Service” is a program that runs on your database server. This cannot be installed on any computer other than the database server, and must be installed and configured by a user that has Administrative Rights on that machine. (if your database is installed on a workstation, then the Demandforce Data Service must also be installed on that same workstation)

The Demandforce Servers will only accept a total of 3 data synchronizations (aka ‘Extracts’) per day. Any attempt to push data to their servers more than 3 times per day will result in each subsequent attempt being discarded without being processed.

**Basic Setup**

Initial Setup.....3

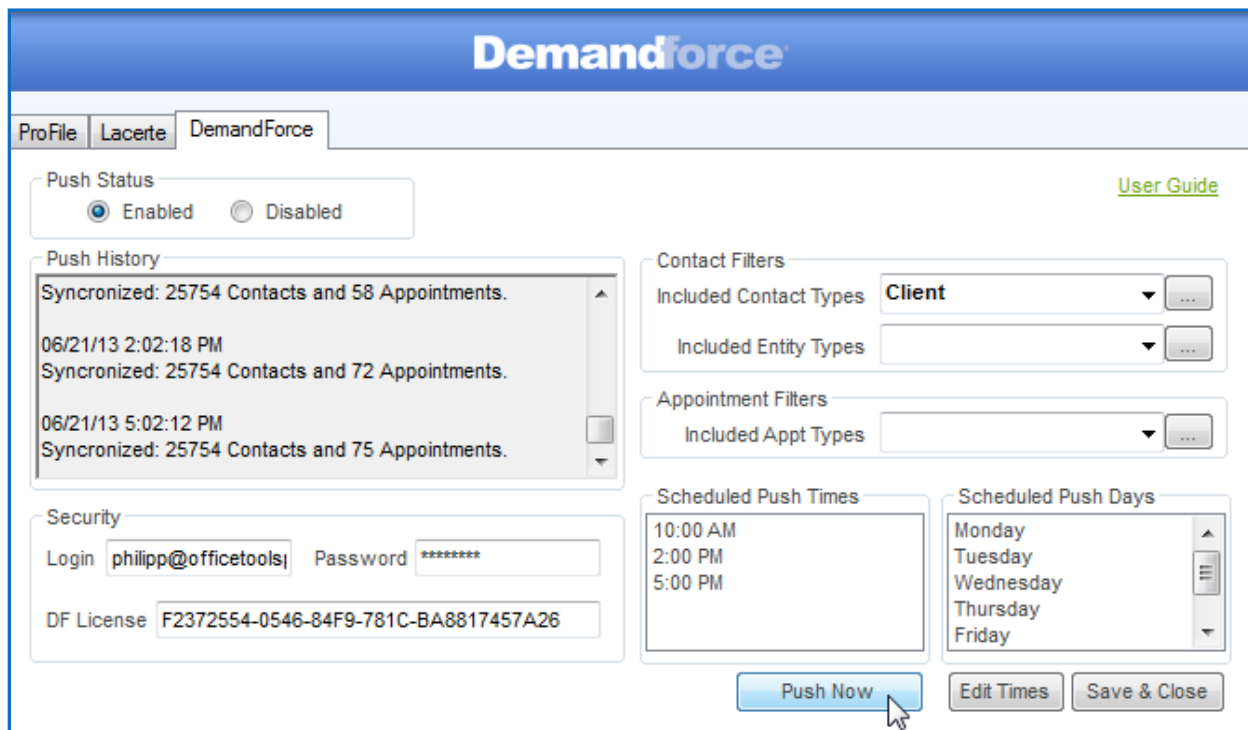
Thank You Emails .....5

# Basic Setup

**Overview:** This section will show how to access Demandforce Integration options and functions.

## Initial Setup

The Demandforce Data Service is an easy-to-use synchronization tool that automatically pushes changes to Contact and Appointment data from within Practice Management directly to the Demandforce servers. Once you are licensed to use the Demandforce Data Service, go to Setup>My Company>Information and Settings>Integrations, and navigate to the Demandforce tab.



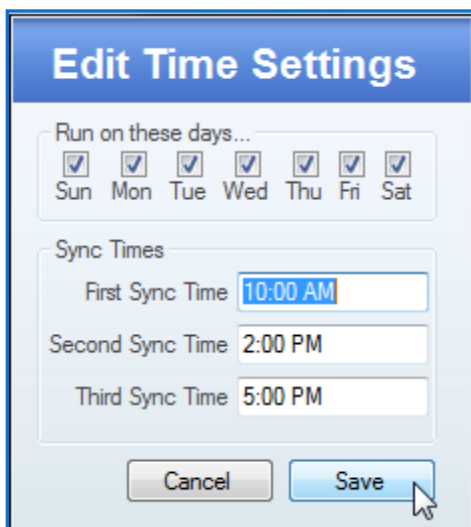
The screenshot shows the Demandforce integration setup interface. At the top is a blue header with the 'Demandforce' logo. Below the header is a tabbed interface with three tabs: 'ProFile', 'Lacerte', and 'DemandForce'. The 'DemandForce' tab is active. The main content area is divided into several sections:

- Push Status:** A section with two radio buttons, 'Enabled' (selected) and 'Disabled'.
- Push History:** A scrollable list showing synchronization history. It includes entries like 'Synchronized: 25754 Contacts and 58 Appointments.' and '06/21/13 2:02:18 PM Synchronized: 25754 Contacts and 72 Appointments.'
- Contact Filters:** A section with two dropdown menus. The first is 'Included Contact Types' with 'Client' selected. The second is 'Included Entity Types'.
- Appointment Filters:** A section with a dropdown menu for 'Included Appt Types'.
- Scheduled Push Times:** A list of times: '10:00 AM', '2:00 PM', and '5:00 PM'.
- Scheduled Push Days:** A list of days: 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'.
- Security:** A section with a 'Login' field containing 'philipp@officetools', a 'Password' field with masked characters, and a 'DF License' field containing 'F2372554-0546-84F9-781C-BA8817457A26'.

At the bottom right, there are three buttons: 'Push Now' (highlighted with a mouse cursor), 'Edit Times', and 'Save & Close'. A 'User Guide' link is located in the top right corner.

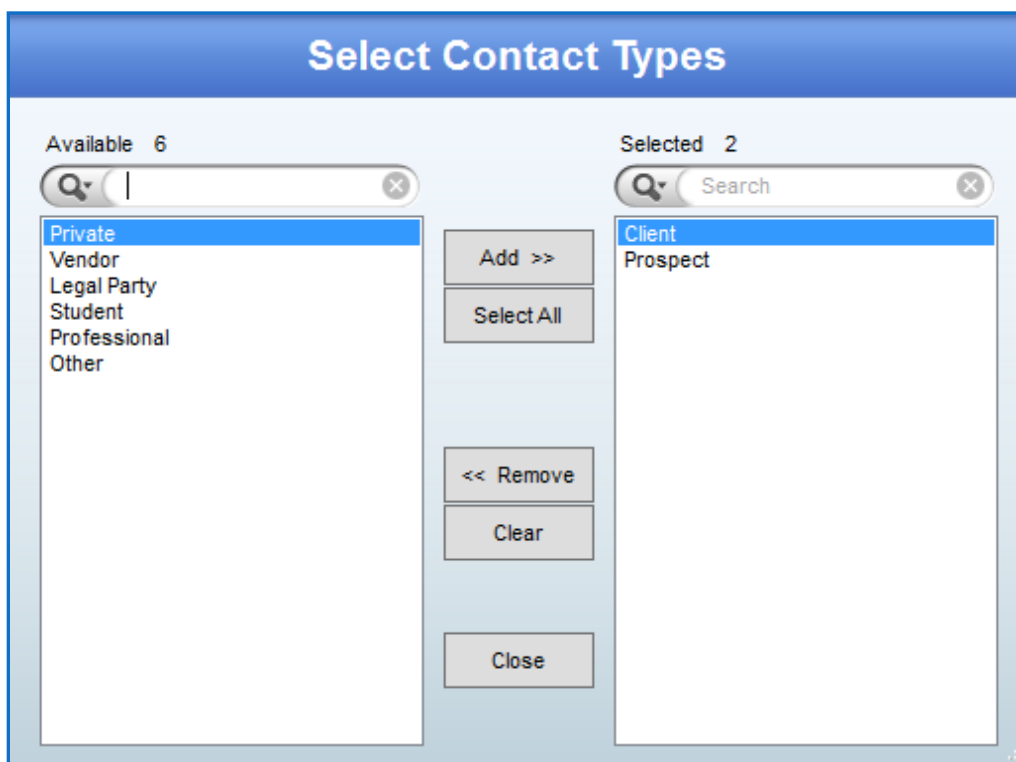
This form consists of multiple elements: an area to enable/disable the data service, a History window to see the previous synchronization history, a Security area to enter your Demandforce login credentials and API Access Key, an Appointment Filter area where you can specify which appointment types you want to synchronize, and an area that shows the Days and Times you have selected to perform the Data Synchronizations.

Once you enter in your account login information and the API Access Key, click the 'Edit Times' button to open up the date and time editor form. From within this form, you can select which days each week you want the Data Service to run, and you can specify what times on those days you want the data to be synchronized (up to 3 times per day). Once you have selected the days and times, click 'Save' to close the form.



The 'Edit Time Settings' dialog box has a blue header. Below it, the 'Run on these days...' section contains seven checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, all of which are checked. The 'Sync Times' section contains three text input fields: 'First Sync Time' with the value '10:00 AM', 'Second Sync Time' with the value '2:00 PM', and 'Third Sync Time' with the value '5:00 PM'. At the bottom are 'Cancel' and 'Save' buttons, with a mouse cursor pointing at the 'Save' button.

Next you can choose which Contact Types, Entity Types, and Appointment Types you want to synchronize with the Demandforce Service. Clicking on the ellipsis (...) button next to one of those filters will open up a form which will allow you to choose a range of different items to include in the synchronization. To choose one, simply click on its name in the list on left and click the 'Add' button. You can select multiple items by clicking and dragging, holding the 'Ctrl' key while clicking, or holding the 'Shift' key while clicking.



The 'Select Contact Types' dialog box has a blue header. It is divided into two main panes. The left pane, titled 'Available 6', contains a search bar and a list of contact types: Private, Vendor, Legal Party, Student, Professional, and Other. The right pane, titled 'Selected 2', contains a search bar and a list of selected contact types: Client and Prospect. Between the panes are several buttons: 'Add >>', 'Select All', '<< Remove', 'Clear', and 'Close'.

You must specify at least one Contact Type, one Entity Type, and one Appointment Type for the Demandforce service to work, otherwise you will not have any Contacts/Appointments synchronized with your Demandforce service.

Now that you have the account login information, API Access Key, and Days/Times, and Contact Type/Entity Type/Appointment Type filters setup, you can click the 'Enable' option at the top of the screen to allow the Data Service to begin.

If at any time you want to make an immediate data push to the Demandforce servers, you can click the 'Push Now' button. This is still limited to the 3 data pushes per day, so if you use it, one of your scheduled data pushes will not run.

Please Note: Any time a data synchronization takes place, the results of that synchronization will be saved into the log inside the Office Tools database (viewable from the Demandforce Data Service Settings page) and inside the Windows Application Event log (viewable from the Windows Event Viewer).

## Thank You Emails

One of the main features of Demandforce is the feature that sends you 'Thank You' emails. With the integration, those emails are triggered when the appointment is completed and a time card is created from that appointment. As soon as the time card is billed (and the invoice is marked 'Final'), the sync will notify Demandforce during the next export and will trigger the 'Thank you' email for the appointment that created the Time Card. So be sure to create Time Cards by either auto-creating time cards on the completion of the appointment, or by right-clicking on the appointment and stating 'Create Time Card'.