



Automated Appointment Solutions

Upcoming Event Schedule

Location	Date	Time and Duration

Agenda

Introduction	Minutes	Link
Login and Dashboard	Minutes	Link
Calendar	Minutes	Link
Contacts	Minutes	Link
Settings	Minutes	Link
Calendar Events & Reminders	Minutes	Link
Speech & Text categories	Minutes	Link
Trifold (Client Portal)	Minutes	Link
Office Banner (Client Portal)	Minutes	Link

Login and Dashboard

(3 privilege levels: owner, provider, clerk)

Login levels / 2step	Minutes	Link
Updates and Message Center	Minutes	Link
Portal Message Center	Minutes	Link
Mini Calendar	Minutes	Link
Happenings	Minutes	Link

Calendar

Monthly	Minutes	Link
Weekly	Minutes	Link
One Provider	Minutes	Link
Calendar Day	Minutes	Link

Contacts

Display & Search	Minutes	Link
Chart Overview	Minutes	Link
Portal Messages	Minutes	Link
Contact Data	Minutes	Link

Settings (Based on login privilege)

My Account <small>(owner login)</small>	Minutes	Link
Owner Settings <small>(owner login)</small>	Minutes	Link
Import / Export <small>(owner login)</small>	Minutes	Link
My Login Options <small>(all)</small>	Minutes	Link

Settings / Owner Settings (owner privilege)

	Minutes	Link
	Minutes	Link
	Minutes	Link
	Minutes	Link
	Minutes	Link
	Minutes	Link

Settings / Import & Export (owner privilege)

Import Contacts	Minutes	Link
Export Contacts (Active / Dormant)	Minutes	Link
Restore Contacts from file	Minutes	Link
Export Appointments (Offline Use)	Minutes	Link
My-Tools (offline use)	Minutes	Link

Settings / My Account (owner privilege)

Email, Cell, Password, Clerk	Minutes	Link
Mailing / Billing	Minutes	Link
Payment History	Minutes	Link
Make a Payment / Auto Renew / Add Months	Minutes	Link
Refund Request	Minutes	Link
Close Account	Minutes	Link

Settings / My Login Options (All privilege levels)

Overview	Minutes	Link
My Preferences	Minutes	Link
Office Notes	Minutes	Link
Support	Minutes	Link
OnCall manager	Minutes	Link
Portal Login	Minutes	Link
Help	Minutes	Link