Tops DPX

Tops DPX Requirement

1 Any computers using Tops DPX needs to be on macOS 10.15 or higher.

Helpful hints on how to use this document.

2 Use Command +F to easily search the PDF for the below sections: Patient Groups and Smart Messaging, Location Settings, Schedule Overview, Patient Communicator, Review, Email Campaign

3 ACCESSING APPOINTMENT REMINDERS: Launch Tops on your workstation. Click on the 'COMM Menu and choose 'APPOINTMENT REMINDERS'.
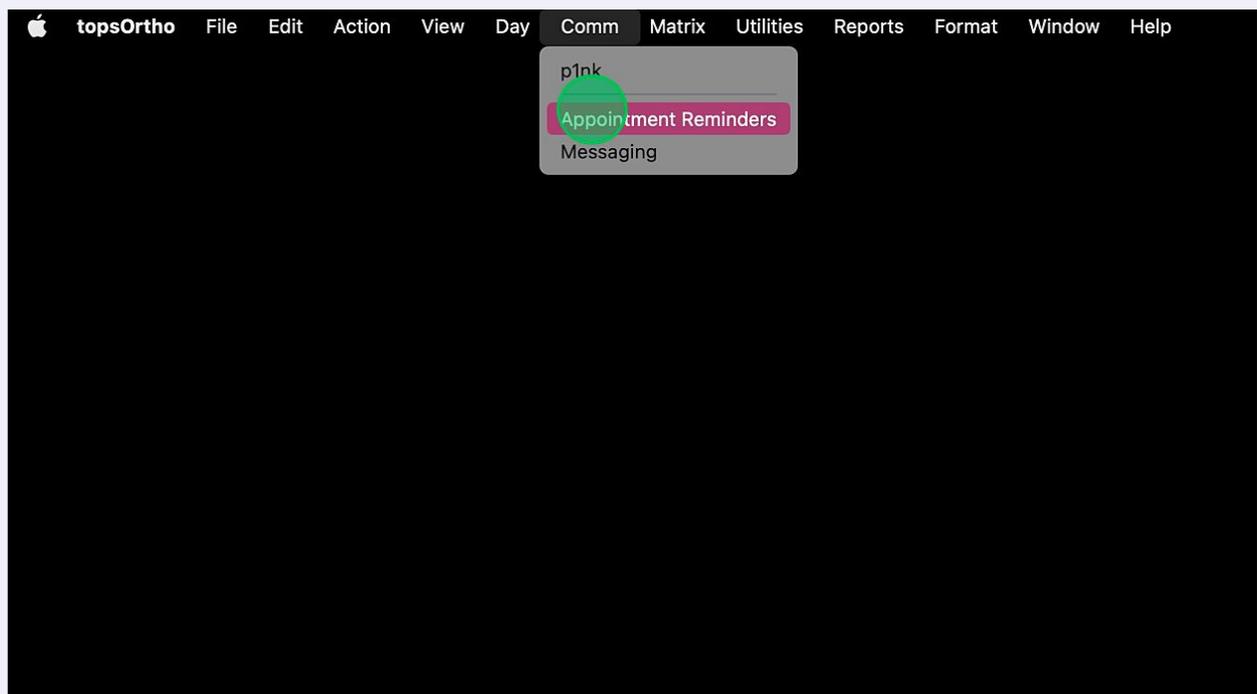
4 Enter your Tops password and select 'OK'.

Appointment Reminders

Messages   Schedule & Settings   Review | Email Campaign | Recall | Location Settings

Type your topsOrtho password:

Use&...&l to
auth&...&nent
reminders service.

Cancel   OK
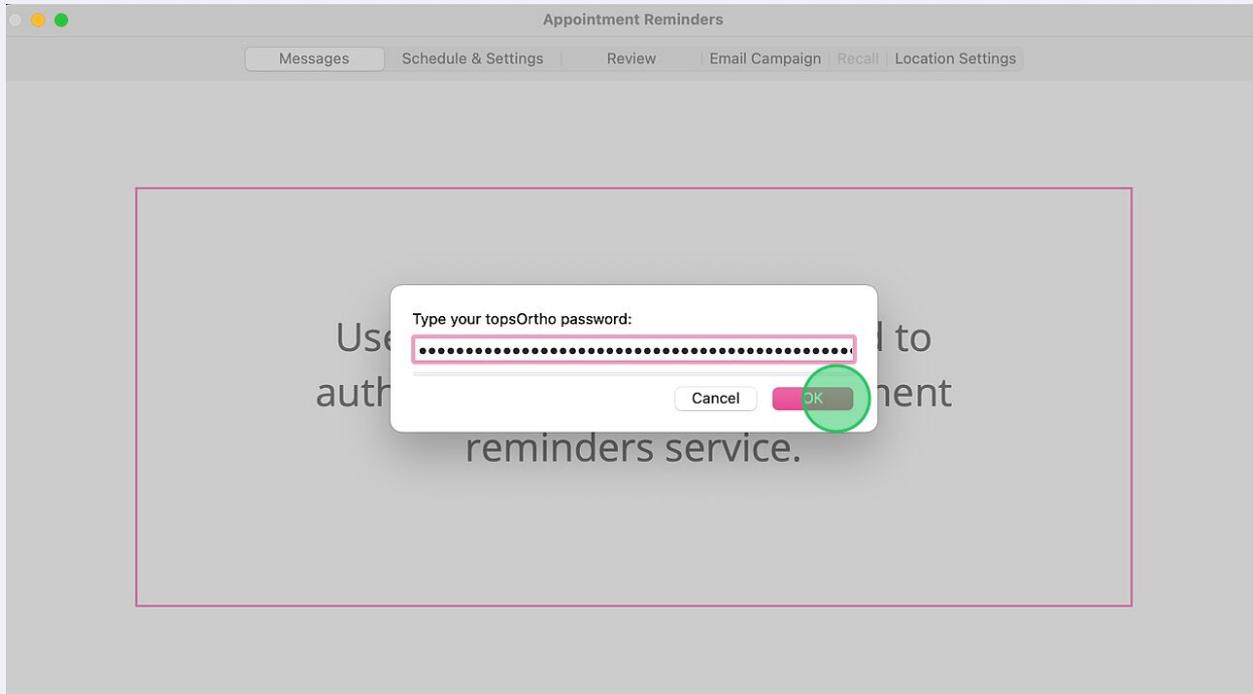
5 APPOINTMENT REMINDER SETTINGS: Once the Appointment Reminders window opens you will click on the 'SCHEDULE & SETTINGS' Tab.

Appointment Reminders

Messages   Schedule & Settings   Review | Email Campaign | Recall | Location Set

Patient Communicator

Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts

To: _____

Focused   All   Filter ▾

New Message
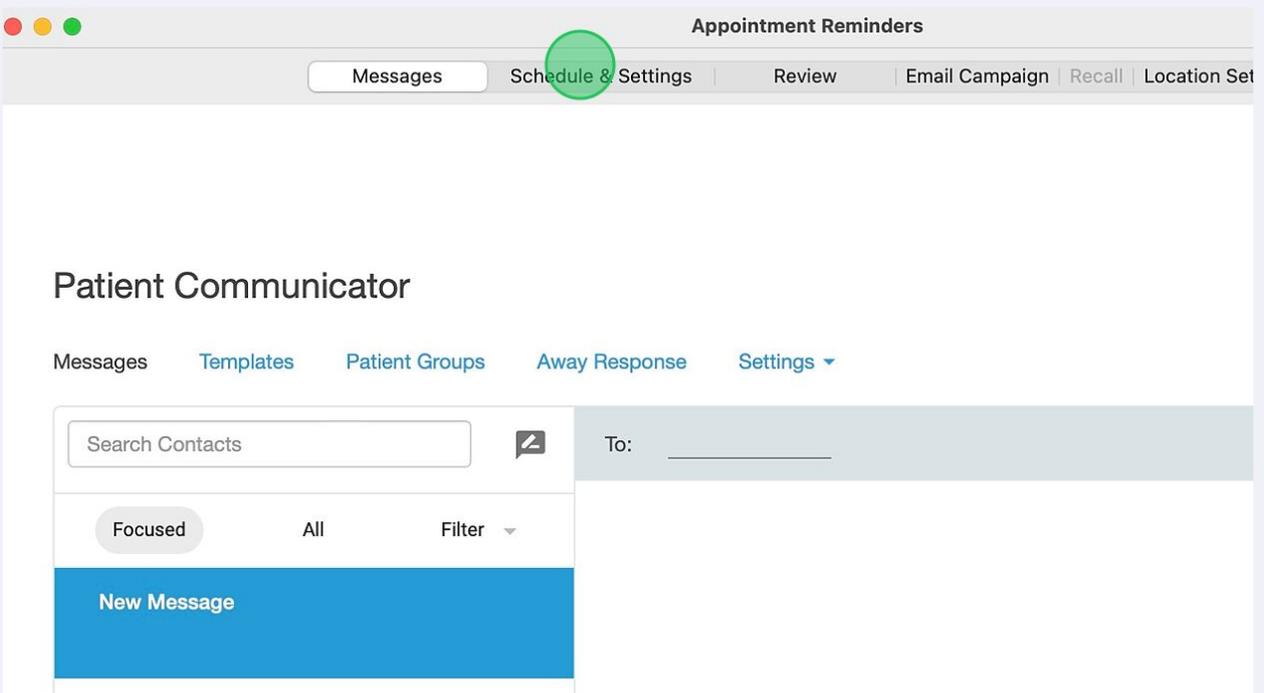
6   Once you are in the Schedule & Settings window Click 'SETTINGS'.

Appointment Reminders

| Messages | Schedule & Settings | Review | Email Campaign | Recall | Location Setti |

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Action Items   Last Data Read 3 minutes ago

| Unconfirmed (3) | Newly Confirmed (0) | Reschedule Needed (0) |

▶   **3/15**   WED   **0 Unconfirmed**   0 Total Appts
        TODAY

---
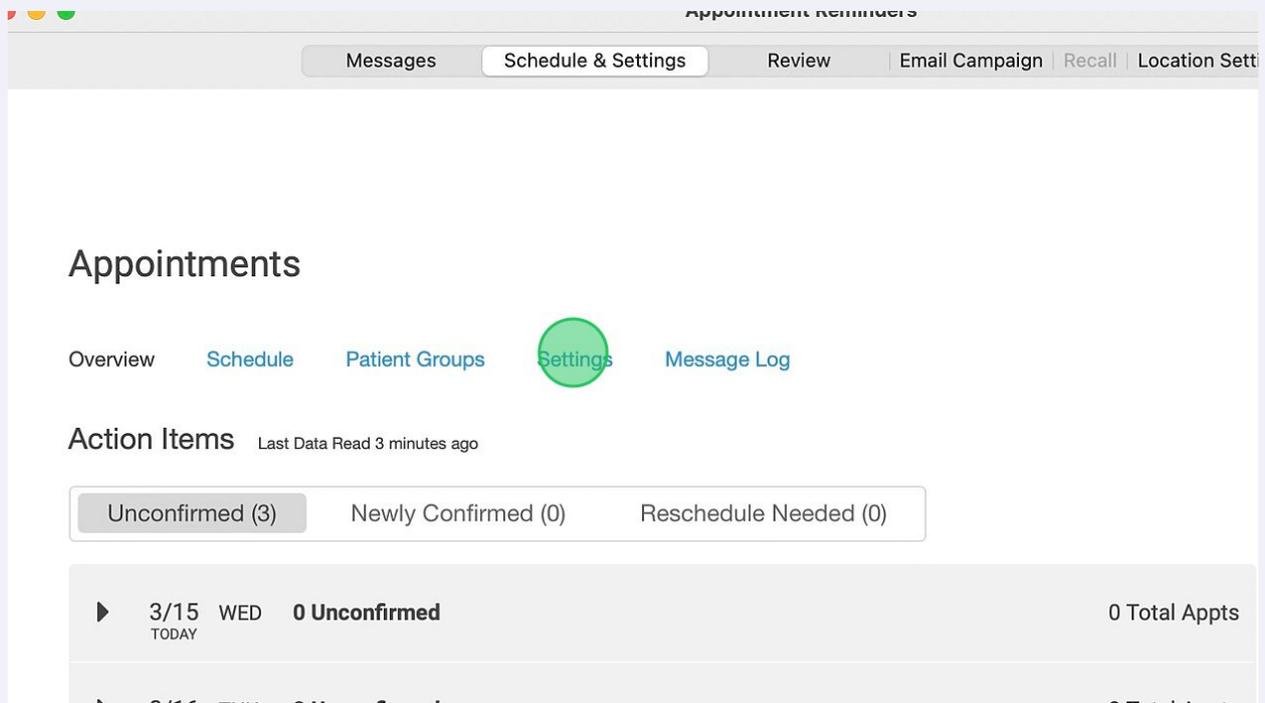
7   You will see 3 boxes :Appointment Reminders, Appointment Confirmations and Missed Appointment Notices Click 'APPOINTMENT REMINDERS' to begin.

Appointment Reminders

| Messages | Schedule & Settings | Review | Email Campaign | Recall | Location Settings |

Tops OTesting ▼

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Messaging Types

| Appointment Reminders | Appointment Confirmations | Missed Appointment Notices |
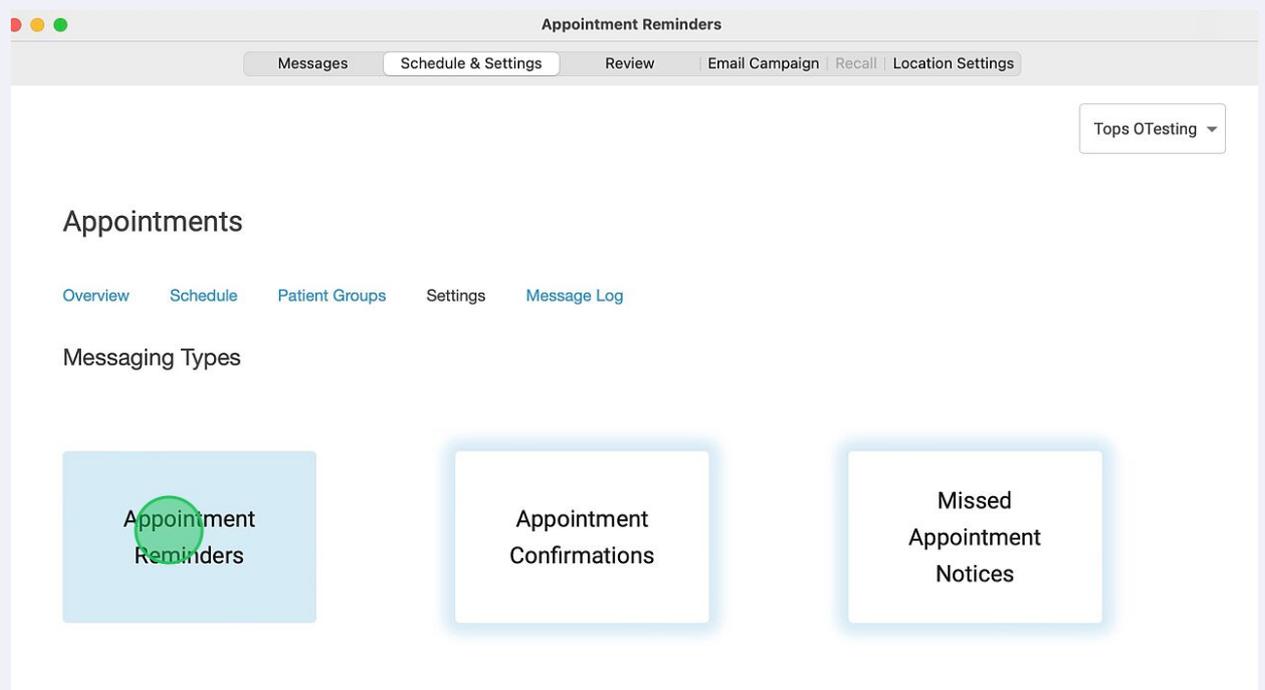
8 You will have default reminders already setup that you can edit as needed. To change the interval and what type of message you send click on the 'GEAR.'

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Appointment reminders
← Back to Messaging Types

Appointment Reminder 30 days before appointment ⚙	Select a schedule or template
Text	
Family Text	
Email	
Family Email	
Appointment Reminder	

9 You can then make changes as needed. You will repeat these steps for each reminder message.

Appointment Reminder
30 days before appointment ⚙

Text

Family Text

Email

Family Email

Appointment Reminder
1 hour before appointment ⚙

Text

Family Text

Editing Appointment Reminder Schedule

Friendly Name

Contact Method

☑ Text   30 ↕   HOURS   DAYS

☑ Email

Filters:

Rule
Only send ▼   this message to   All

10 Click 'SAVE' once you are done editing.

ppointment Reminder
hour before appointment ⚙

Text

Family Text

Email

Family Email

ppointment Reminder
days before appointment ⚙

Text

☑ Email

Filters:

Rule
Only send ▾   this message to

Patient (
All pat

SAVE   **HISTORY**

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11 To edit the message template you will click on each message type.

Overview   Schedule   Patient Groups   Settings   Message Log

Appointment reminders
← Back to Messaging Types

Appointment Reminder
30 days before appointment ⚙

Text

Family Text

Email

Family Email

Appointment Reminder
1 hour before appointment ⚙

Editing Appointment Reminder Schedule

Friendly Name

Contact Method

☑ Text   30 ⇕   HOURS **DAYS**   **BEFORE** AFTE

☑ Email

Filters:

Rule   Patient Group

12 Then edit as needed. To add variables place your cursor where you would like the variable to go and then click on the blue variable. You will see a preview of the message to the right. Click 'SAVE' when done editing.

ENGLISH   SPANISH   FRENCH

Editing Schedule Template

Variables ❓

[First Name] [Last Name] [Location Phone Number]

[Location Name] [Weekday] [Month Day] [Time] [Short Date]

Hi First Name, you have an appt at Tops OTesting on Month Day at
HH:MM,AM/PM. Call us at (760) 489-0330 if you have any questions
STOPtoOptOut

142/320

Preview
Hi John, you have an appt at Tops OTesting on March 15 at 06:54 PM. Call us at (760) 489-0330 if you have any questions STOPtoOptOut

SAVE   BACK

13 Repeat for each message type. Family Text and Family Email will send 1 reminder for all patients with an appointment that have the same phone number.

Appointment reminders

← Back to Messaging Types

Appointment Reminder
30 days before appointment   ⚙

Text

Family Text

Email

Family Email

Appointment Reminder
1 hour before appointment   ⚙

Text

Family Text

ENGLISH   SPANISH   FRENCH

Editing Schedule Template

Variables ❓

[First Name] [Last Name] [Location Phone Number]

[Location Name] [Weekday] [Month Day] [Time] [Short Date]

Hi First Name, you have an appt at Tops OTesting on Month Day at
HH:MM,AM/PM. Call us at (760) 489-0330 if you have any questions
STOPtoOptOut

142/320

14 Click 'BACK TO MESSAGING TYPES' to edit appointment confirmations and missed appointment notices following the above steps.

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Appointment confirmations
← Back to Messaging Types

Confirmation Request 7 - 3 days before appointment	⚙
Text	
Family Text	
Email	

ENGLISH   SPANISH   FRENCH

Editing Schedule Template

Variables ❓

First Name   Last Name   Location Name   Month Day

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15 In Missed Appointment Notices it's recommend to keep automated toggled on to automatically send missed appointment notices.

Message Log

When Automated is toggled off, you will receive a daily email to review any available missed appointment notices and send them manually. When Automated is toggled on, We will automatically send missed appointment notices on your behalf.

🔵 Automated ⓘ

SPANISH   FRENCH

Schedule Template

❓

Last Name   Location Name   Month Day

Short Date

Hi John, we missed you at your scheduled appoi
Call (760) 489-0330 or text back to reschedule ·
OTesting. STOPtoOptOut

16 VOICE REMINDERS: EDIT IN APPOINTMENT CONFIRMATIONS: the service is configured to call all patients who are still unconfirmed after the initial attempts by text and email. With our standard message timeline this would be 3 days before the appointment, if the 7 day and 5 day confirmation messages are not successful in getting a confirmation.

17 When editing do not modify or remove the message asking the patient to press 1 to confirm and 0 to hear the message again, as this function is necessary for your Voice Reminders to work correctly. Click on 'TEST CALL' to hear a sample of the message.

18 BIRTHDAY REMINDERS: Birthday reminders can be sent by text or email on the patient's birthday. The default is set to send by text. To edit click on 'BIRTHDAY REMINDERS'.
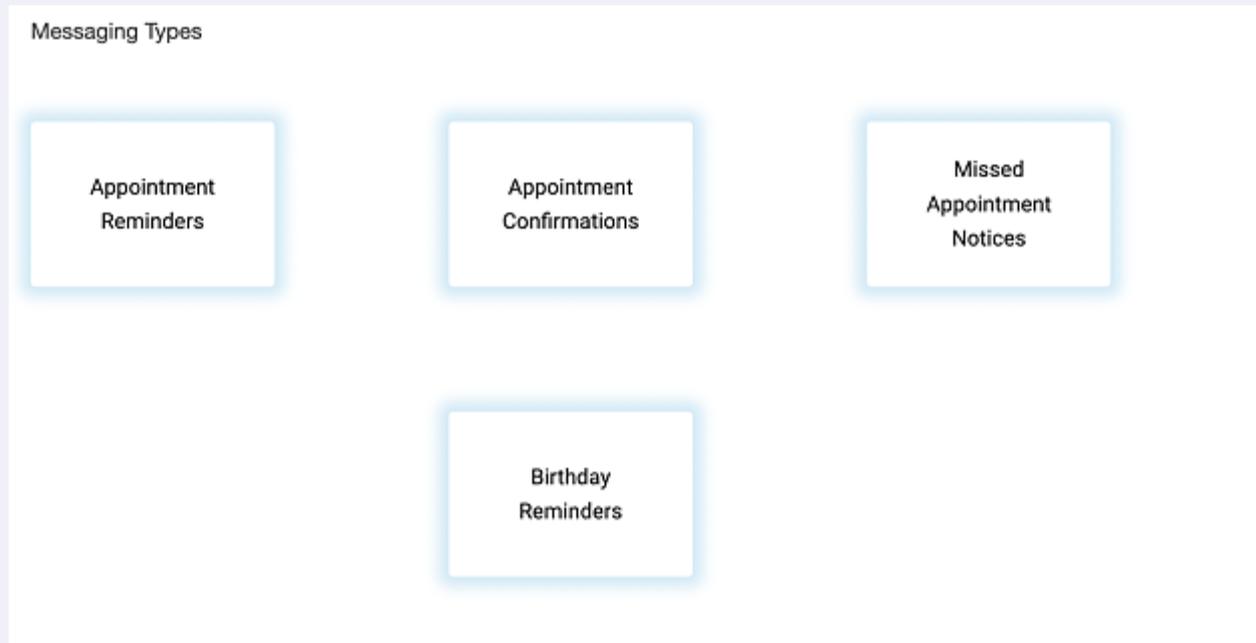
Messaging Types

Appointment Reminders

Appointment Confirmations

Missed Appointment Notices

Birthday Reminders

19 Then edit as needed. To add variables place your cursor where you would like the variable to go and then click on the blue variable. You will see a preview of the message to the right. Click 'SAVE' when done editing.

ppointment birthday
Back to Messaging Types

Birthday Reminder
On birthday   ⚙

Text

Family Text

Editing Schedule Template

Variables ❓

First Name   Last Name   Location Phone Number   Location Name

Happy Birthday First Name from all of us here at Tops DPX Demo! Have a great day and we look forward to seeing you soon!

120/400

SAVE   BACK

Preview
Happy Birthday John from all of us at Tops DPX Demo! Have a great day we look forward to seeing you soon
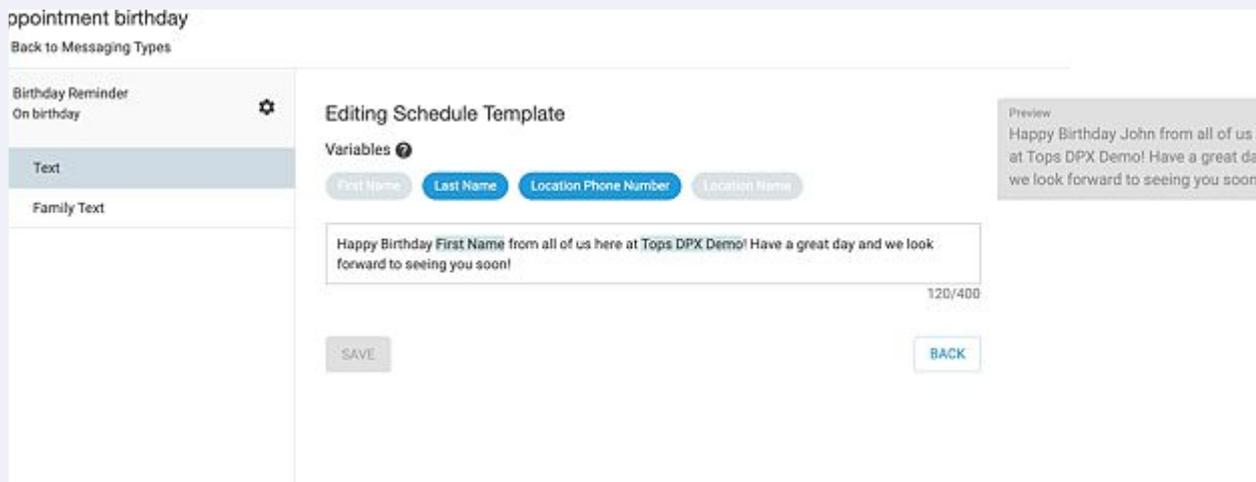
20 PATIENT GROUPS AND SMART MESSAGING: Click 'PATIENT GROUPS': Patient groups can be used in the Patient Communicator, Email Campaigns, and for Smart Messaging. Patient groups allow you to send messages to specific Patient groups by appointment type.

Appointment Reminders

| Messages | Schedule & Settings | Review | Email Campaign | Recall | Location Sett |

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Action Items Last Data Read an hour ago

| Unconfirmed (0) | Newly Confirmed (2) | Reschedule Needed (0) |

▶ 3/17 FRI **0 Unconfirmed**   0 Total Appts
TODAY
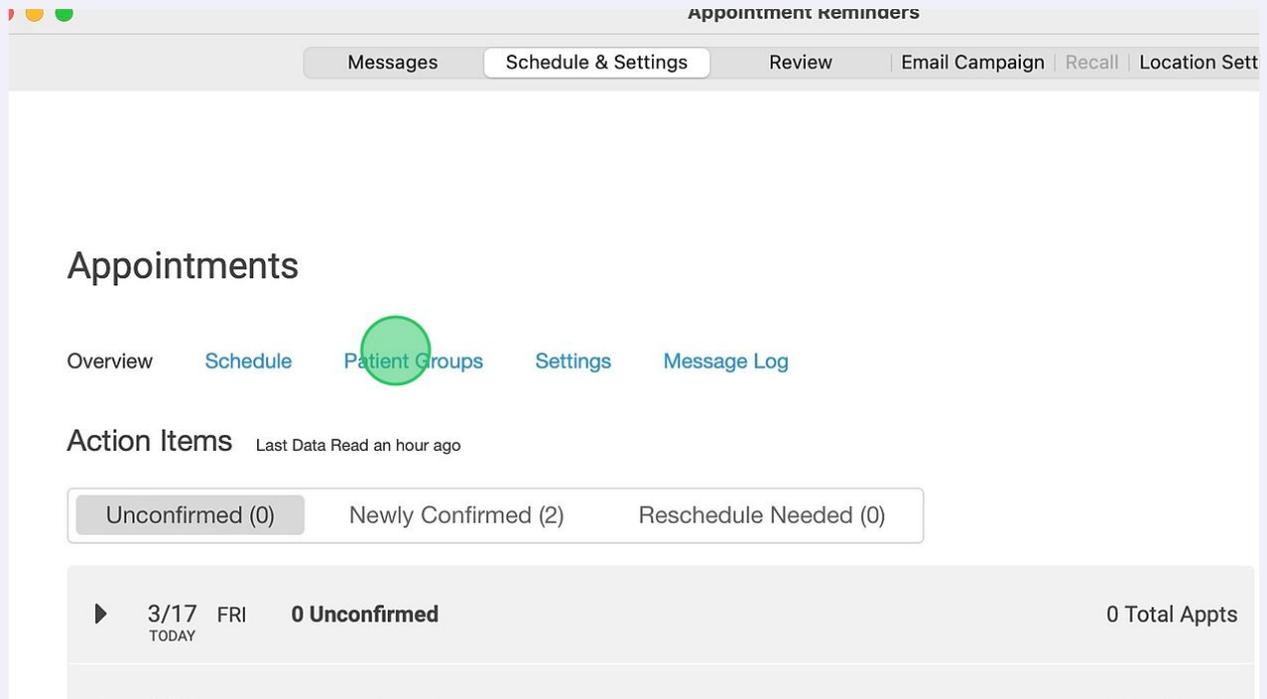
21 Create a new patient group by selecting the + button in the upper right hand corner.

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Patient Groups   Search × ⟳ ⊞ Add

Name	Practitioners	Treatments	Operatories	Created	Actions
Check	Mary Bradly	Full Banding	1	Mar 17, 2023	✏ 🗑
Test grp	Mary Bradly	Initial Contact	1	Mar 17, 2023	✏ 🗑
Sahoo Test group	Eugenio Martins	Full Banding	1	Mar 17, 2023	✏ 🗑
New patient exam		New Patient Exam		Mar 17, 2023	✏ 🗑
Band 7s		Band 7s		Mar 17, 2023	✏ 🗑
test	Multiple			Mar 17, 2023	✏ 🗑

22 Name the group by clicking into the Name filed. Click on the Treatment dropdown to add your group filters based on your desired appointment type. The list is built from appointment types that you have scheduled.

23 Complete all drop-downs and then click on the 'CHECKMARK' to save.

24

To search for existing patient group you can click into the Search field to add the name of the patient group.

Tops OTesting ▾

tient Groups   Settings   Message Log

🔍 Search   ✕   ⟳   ➕

tioners	Treatments	Operatories	Created	Actions
Bradly	Full Banding	1	Mar 17, 2023	✏️ 🗑️
Bradly	Initial Contact	1	Mar 17, 2023	✏️ 🗑️
io Martins	Full Banding	1	Mar 17, 2023	✏️ 🗑️

25 To apply a patient group to a reminder, use the filters to apply the rule of when to send and which patient group to send message to. Then click 'SAVE'. This reminder will take the place of your standard appointment reminder with the same time interval. (Note: It's recommended to create a Patient group reminder to replace the 1 hour before reminder.)

Friendly Name

Contact Method

☑ Text   30   HOURS **DAYS**   **BEFORE** AFTER

☑ Email

Filters:

Rule   Patient Group

Only send this message to   All patients

SAVE   HISTORY

26 RECALL: Click 'RECALL' to edit settings.

Messages   Schedule & Settings   Review   Email Campaign Recall Location Settings

Tops OTesting ▾ 🔔

:all

Daily Review

Automated ⓘ

Treatments are being gathered, please check back shortly

MANAGE TEMPLATES

all Active   Treatments   Friendly Name   Time Since Last Visit

27 Click on 'SETTINGS' To edit as needed. By default recalls are sent 30 days prior to Target recall date and 1 day after (past due) if appointment is not scheduled.

Recall

Settings   Daily Review

Recall Templates
← Back to Recall Settings

🔵 Automated ⓘ

| Upcoming Due Recall | ⚙ |
| 30 days before due date | |

Text

| Past Due Recall | ⚙ |
| 1 day after due date | |

Text

| Past Due | ⚙ |
| 45 days after due date | |

Text

Email

Editing Schedule Template

Variables ❓

First Name   **Last Name**   Location Phone Number

Location Name   Treatment Name

Hi First Name, you're almost due for next Treatment Name. Call (760) 489-0330 to schedule today! - Tops OTesting. ReplySTOPoptout

129/400

SAVE   BACK

Preview

Hi John, you're almost due for next Routine Appointment. Call (760) 489-0330 to schedule today! - Tops OTesting. ReplySTOPoptout

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28 Daily Review will allow you to see the Upcoming due or Past Due recalls. Note: If you see 'not available' either the patient has unsubscribed or we were unable to find phone number/email address.

Recall

Settings   Daily Review

<   May 17, 2023   >

Upcoming Due Recall | Due Date: 2023-06-17

Patient	Phone		
		Either patient has unsubscribed or we are unable to find the email	
Molly Dragos	(770) 430-9309	Not available ⓘ	✓

29 LOCATION SETTINGS: Click 'LOCATION SETTINGS' to edit office information.

Appointment Reminders

Messages | Schedule & Settings | Review | Email Campaign | Recall | Location Settings

Tops OTesting ▾

ent

uests   Public Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

eviews

Patient Feedback

—   —

☹   ☺

Quick Send   SEND MULTIPLE ▾

Patient Name

Including your patient's name adds a personal touch.

Enter Phone Number or Email

30

31 You can edit your Office address (if address changes you will still need to call support for the changes to be made in your Tops System). You can also upload your practice Logo here.

Address Information

Location Logo

Name
Tops OTesting

SMS Display Na...

Drag here or click here to select image from files.
.jpeg and .png only. Max file size of 5MB.

Address
230 W 3rd Ave

Suite

SAVE

City
Escondido

State
CA

Zip
92025

Phone
+17604890330

Time Zone
America/New_York

UPDATE

32 Click 'OPT OUT LIST' If there are patients who wish to not be contacted you are able to add them to the 'Opt Out List'.

Appointment Remir

Messages | Schedule & Settings | Review

Location Settings

Users & Practice Info   Opt Out List   Office Hours   Roles & Permissions

Users

33 Enter the patient name and contact info, then select the services you would like to opt the patient out of receiving messages for.

Add Contact to List

Patient Name (optional)
John Smith

Enter Phone Number or Email
8583452145

Services to opt-out of:

- ☑ Review Requests
- ☐ Patient Communicator
- ☐ Appointment Reminders
- ☐ Appointment Confirmations
- ☐ Recall
- ☐ Missed Appointment Notices

CANCEL   ADD

34 Now you will see the newly added patient on the list. From here you are able to click 'EDIT' and adjust the message preferences for all the services.

*NOTE: If you see contacts on this list without a name they are patients who have opted themselves out of messaging. This is done when responding 'STOP' to one of the texts they have received.

Location Settings

Contact & Address   Opt Out List

Opt Out List

ADD CONTACT

Contact Info	Name	Opted Out Services	Last Updated ↓		
8583452145	John Smith	✿	Nov 20, 2019 11:28AM	View	Edit

35 Click 'OFFICE HOURS'.

Appointment Reminders

| Messages | Schedule & Settings | Review | Email Campaign | Recall | Location S |

Location Settings

Users & Practice Info   Opt Out List   Office Hours   Roles & Permissions   Business Information

Contacts

Q Search

Name	Email	Phone	Opted Out Products	Last Updated

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36 If a text message is received by your office during non business hours, an Away message will be automatically sent to the sender. You can set up your Away message.

Users & Practice Info   Opt Out List   Office Hours   Roles & Permissions   Business Information

ℹ If a text message is sent to your practice outside of Office Hours, an Away message will be sent back to the sender. You can set up your Away message here

Monday	Tuesday	Wednesday	Thursday	Friday

Saturday	Sunday

Add New Hours

Monday ▾   Open ▾

8 ▾ 00 ▾ am ▾   to   6 ▾ 00 ▾ pm ▾

ADD

Automated Message Settings

Select the days you'd like Tops to send automated messages. On any non-selected days, Tops will not contact your patients.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
☑	☑	☑	☑	☑	☑	☑

37   Edit Day and Times by clicking into the appropriate fields. Click 'ADD' once done.

ⓘ If a text message is sent to your practice outside of Office Hours, an Away message will be sent back to the sender. You can

Monday	Tuesday	Wednesday	Thursday	Friday

Saturday	Sunday

Add New Hours

Monday ▲   Open ▼

8 ▼ 00 ▼ am ▼   to   6 ▼ 00 ▼ pm ▼

ADD

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38   Click "Business Information" to add EIN(Tax ID), Legal Business name and address. New regulations require this information to register your phone number and allow text messages to be sent.

Appointment Reminders

Messages | Schedule & Settings   Review | Email Campaign | Recall   Location Settings

Tops OTesting

ist   Office Hours   Roles & Permissions   Business Information

ur practice outside of Office Hours, an Away message will be sent back to the sender. You can set up your Away message here

y	Wednesday	Thursday	Friday

39 Click into the fields to edit once complete, click on 'SUBMIT'.

Location Settings

Users & Practice Info   Opt Out List   Office Hours   Roles & Permissions   Business Information

Business Information

EIN (Tax ID)
_____

Business Name (as registered)
Tops OTesting

Address 1
230 W 3rd Ave

Address 2

City
Escondido

State
CA

Zip
92025

New regulations require the following business information to register your phone number and allow texts to be sent to your patients. This information needs to **match your company's tax filings** associated with your business registration number (EIN). Please review the information you submitted and make changes if necessary. If you need this information, contact your legal department.

- Legal name should be exact (e.g. Twilio Inc. vs. Twilio Holdings Inc. are different).
- For US Customers, make sure to use EIN. DUNS or SSN are not accepted.
- For customers outside the US, contact support to learn more about what business registration information to enter

For more information read here

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40 SCHEDULE OVERVIEW: Click 'SCHEDULE & SETTINGS'.

Appointment Reminders

Messages   Schedule & Settings | Review | Email Campaign | Recall | Locati

nmunicator

nplates   Patient Groups   Away Response   Settings ▾

s   ✍   To: _____

All   Filter ▾

41 Click 'Overview'.

Messages   Schedule & Settings   Review | Email Ca

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Action Items   Last Data Read 2 hours ago

| Unconfirmed (3) | Newly Confirmed (0) | Reschedule Needed (0) |

▶ 3/15 WED **0 Unconfirmed**   0 Total Appts
TODAY

▶ 3/16 THU **3 Unconfirmed**   3 Total Appts

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42 We provide you with a convenient list of patients who are on the calendar in the next 3 days and are still unconfirmed. We also provide you with a list of patients that have recently confirmed their appointment

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Action Items   Last Data Read 2 hours ago

| Unconfirmed (3) | Newly Confirmed (0) | Reschedule Needed (0) |

▶ 3/15 WED **0 Unconfirmed**   0 Total Appts
TODAY

▶ 3/16 THU **3 Unconfirmed**   3 Total Appts

▶ 3/17 FRI **0 Unconfirmed**   0 Total Appts

43 We provide you with a convenient view of your calendar that shows all the patients on the calendar for any particular day including their status (confirmed/unconfirmed).

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Mar 15 - Mar 21 2023   ‹ ›

Wed 03/15 0 unconfirmed 0 appts	**Thu 03/16** 3 unconfirmed 3 appts	**Fri 03/17** 0 unconfirmed 0 appts	**Sat 03/18** 0 unconfirmed 0 appts	**Sun 03/19** 0 unconfirmed 0 appts

🔍 Search Patient

Wednesday, March 15th

No appointments scheduled for this date

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44 You can view one week at a time. Click on the day to view each day. Click into the search field to search for patient.

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Mar 22 - Mar 28 2023   ‹ ›

Wed 03/22 0 unconfirmed 0 appts	**Thu 03/23** 0 unconfirmed 0 appts	**Fri 03/24** 0 unconfirmed 0 appts	**Sat 03/25** 0 unconfirmed 0 appts	**Sun 03/26** 0 unconfirmed 0 appts

🔍 Search Patient

Wednesday, March 22nd

45 Click 'MESSAGE LOG'.

46 The Message log displays the last 30 days of automated reminder messages. You can sort messages by method or reminder type as well as date. Click 'CONTENT' to view the content of the message.

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Message log data table displays last 30 days of automated reminder messages

Recipient	Method	Reminder Type	Send Time	Content
	Any ▾	Any ▾	mm/dd/yyyy 📅	
Alice Chen	Email	Confirmation Request	March 15, 2023 10:20am	Content

1–1 of 1   ‹   ›

47   Review the message and click done when finished.

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Message log data table displays last 30 days of automated reminder messages

Recipient	Method	Reminder Type	Send Time	Content
	Any ▾			
Alice Chen	Email			Content

Content

Subject: Please Confirm Your March 16th Appt. with Tops OTesting

Title: Your Appointment On March 16th

Body: Hi Alice!

This is just a friendly reminder that you have an appointment on Thu, March 16 at 12:40pm with Tops OTesting.

Please click the button below to confirm this appointment.

CLOSE

1 of 1   ‹ ›

48   PATIENT COMMUNICATOR: Click 'MESSAGES' to view the patient communicator. This is where you will receive and send text messages only. Emails will be sent and received from the email inbox used for setup.

Matrix   Utilities   Reports   Format   Window   Help

Appointment Reminders

Messages   Schedule & Settings   Review   Email Campa

Appointments

Overview   Schedule   Patient Groups   Settings   Message Log

Action Items   Last Data Read 3 hours ago

Unconfirmed (3)   Newly Confirmed (0)   Reschedule Needed (0)

49 You can send messages by searching existing contacts. Click in the search contacts field and enter the contacts name. Select the contact from the drop down menu.

Patient Communicator
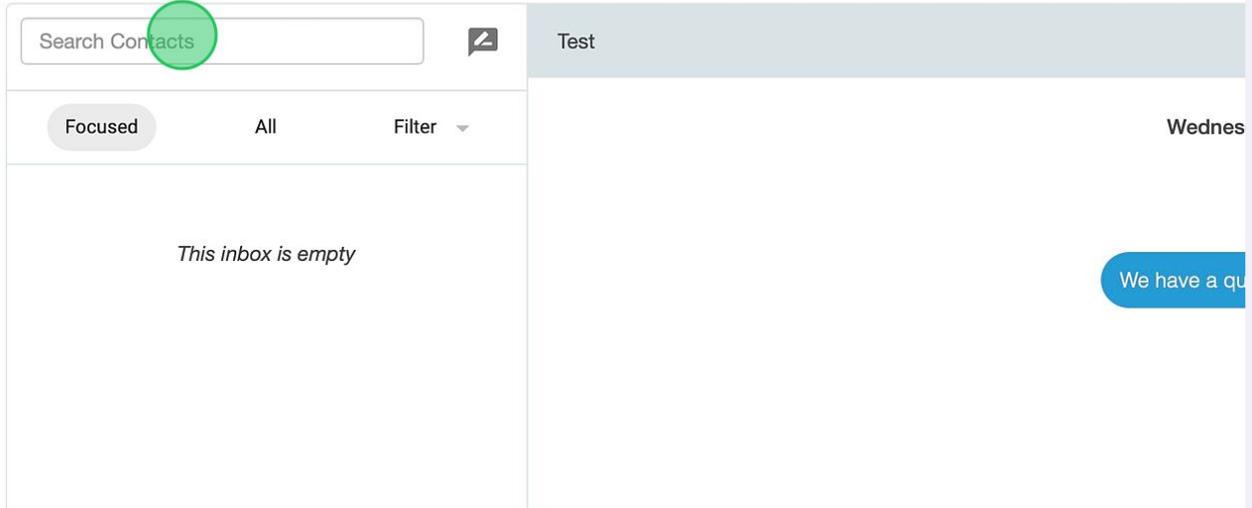
Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts   ✍   Test

Focused   All   Filter ▾   Wednes

This inbox is empty

We have a qu

50 If the contact does not exist you can add them by entering their number in the To: field.

Patient Communicator
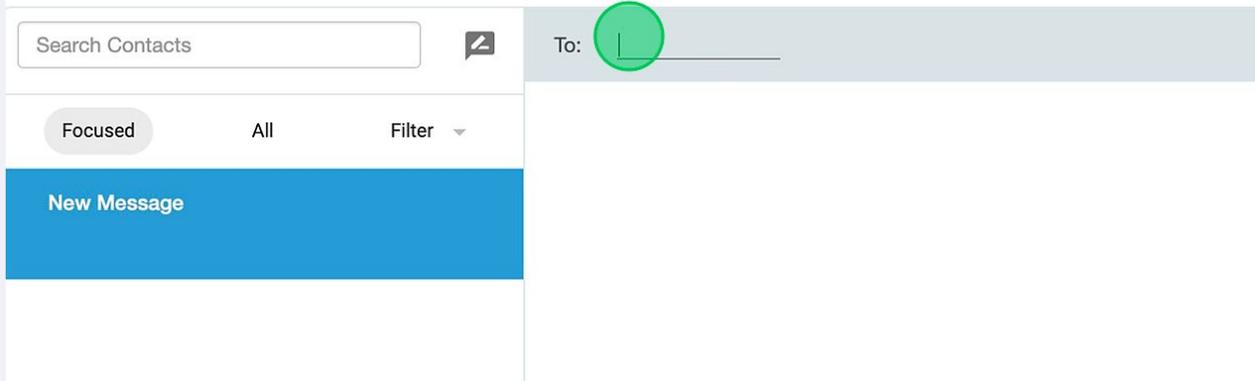
Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts   ✍   To: |

Focused   All   Filter ▾

New Message

51 Once the number is entered press enter or tab to add contact information.

icator

Patient Groups   Away Response   Settings ▾

To: (757) 392-7840   *Press enter or tab to add contact information.*

Filter ▾

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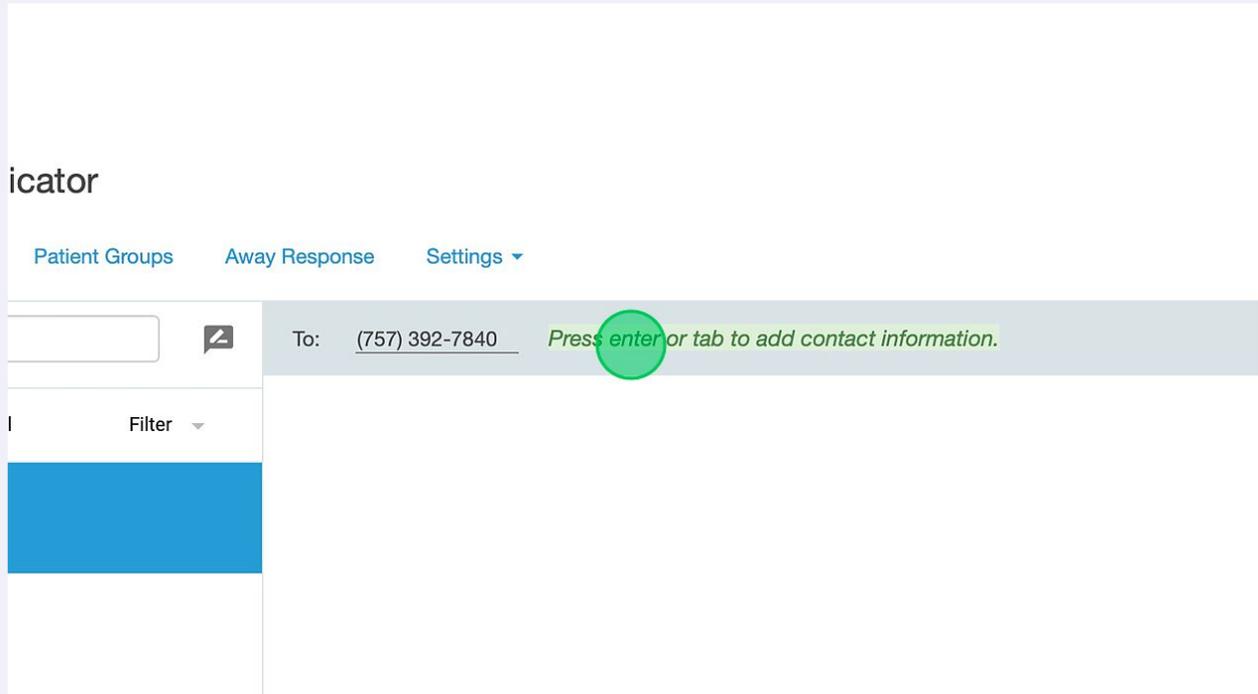
52 The contact information will open to the right. Click on 'CLICK TO EDIT' to add the contact name. Click 'SAVE' when done editing.

Valid Cell Phone!

Contact Information   ✖

MOBILE PHONE NUMBER
(757) 392-7840

CONTACT NAME
Click to edit
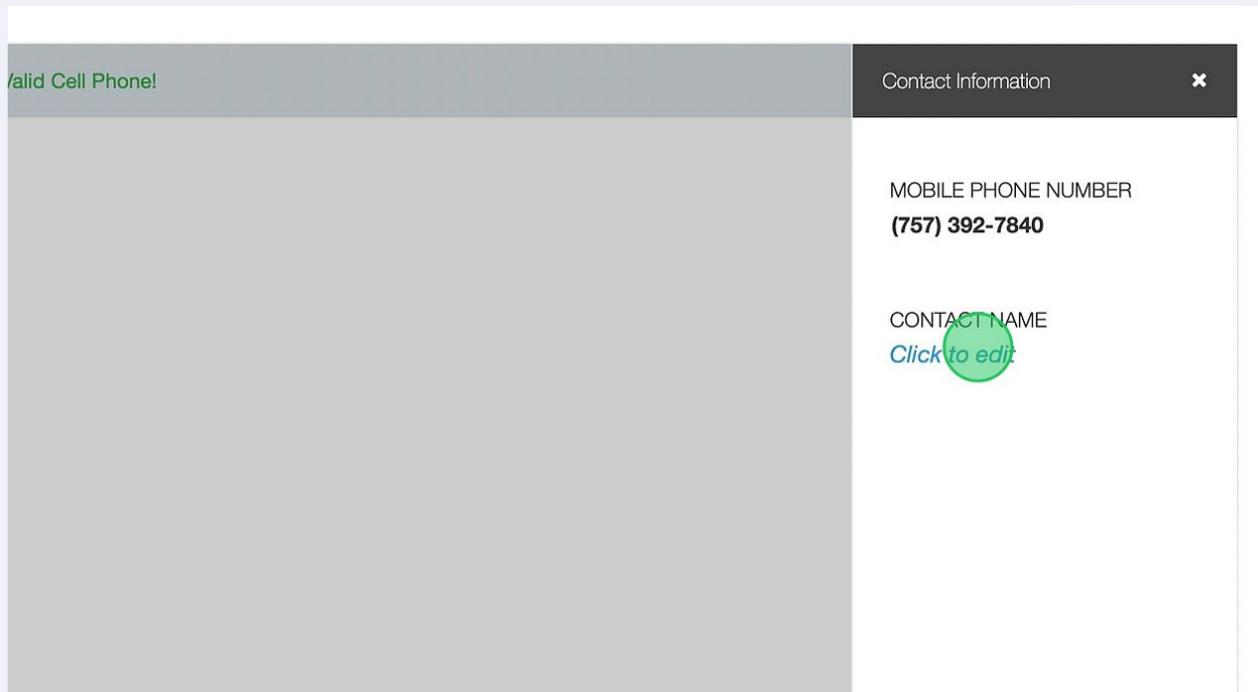
53 Click the message-text area to compose your message. Click 'SEND' when done composing.

This inbox is empty

[Type a message (Please do not enter any sensitive contact health information)

0/320
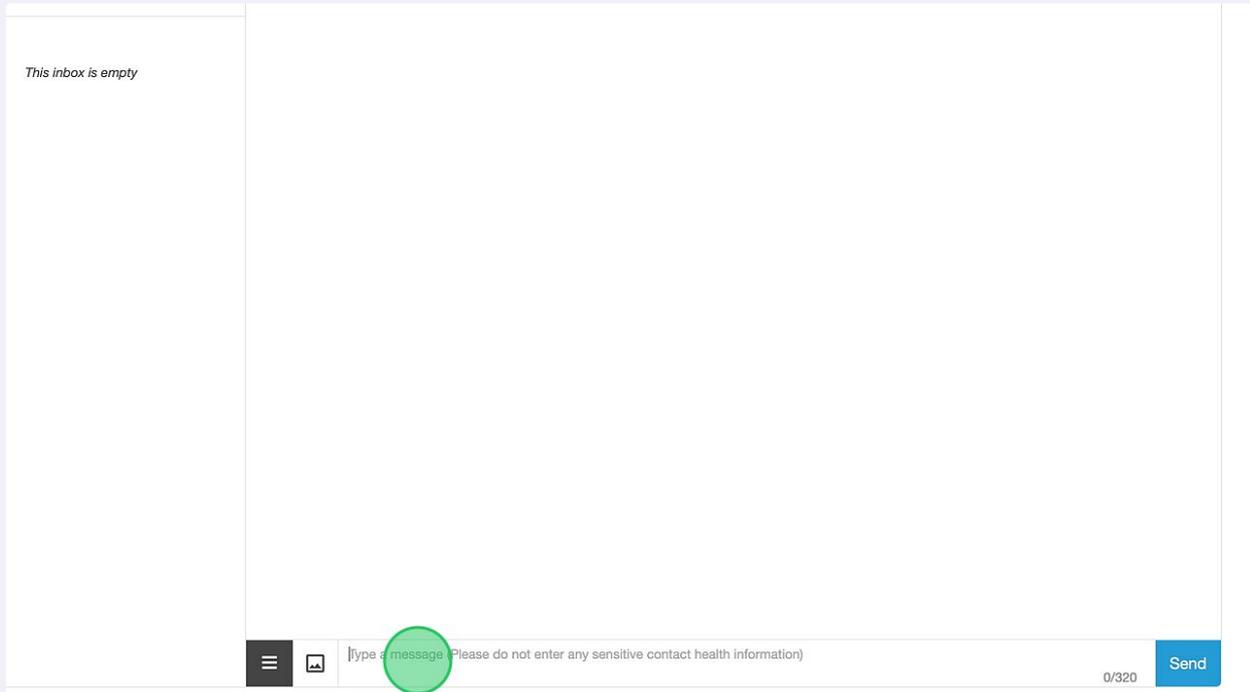
Send

54 Click on the triple bar menu to send a message template. Select the template from the menu.

Appointment Confirmation

Appointment Delay

Appointment Reminder

Arrive Early

Call Us

Emergency Closure

Insurance Details

Missed Appointment

✏ Manage Templates

Type a message (Please do not enter any sensitive contact h
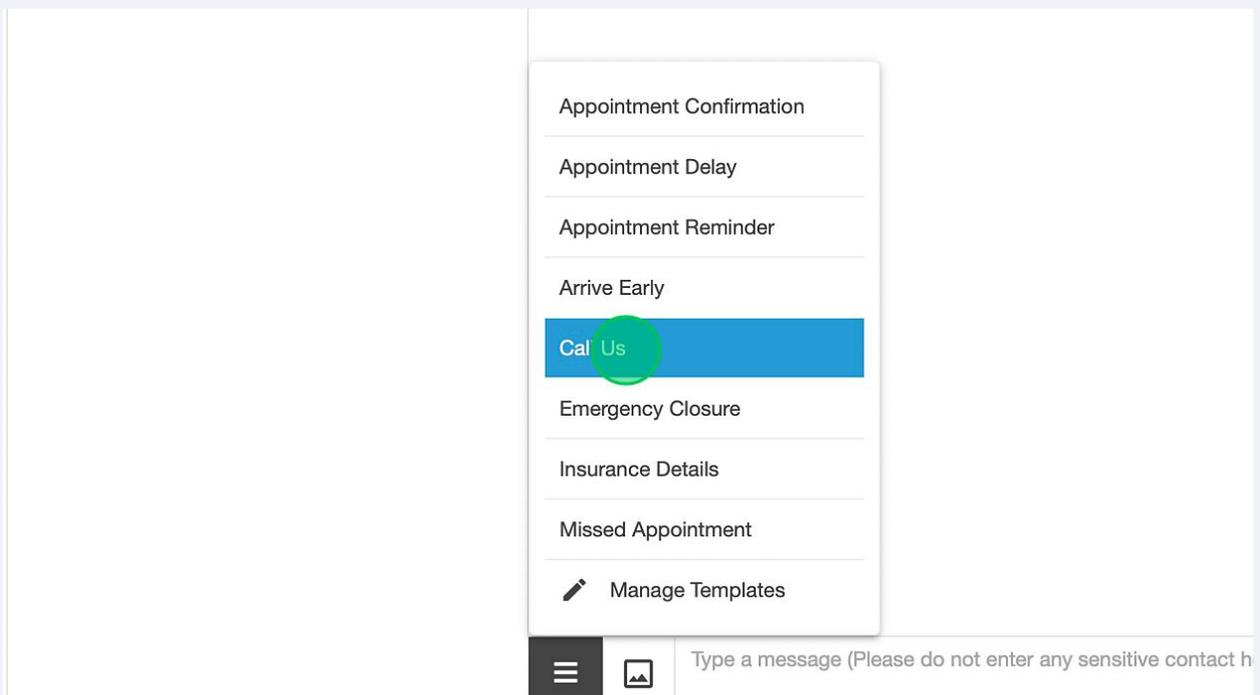
55 Click the images icon to send images.

Type a message (Please do not enter any sensitive contact he
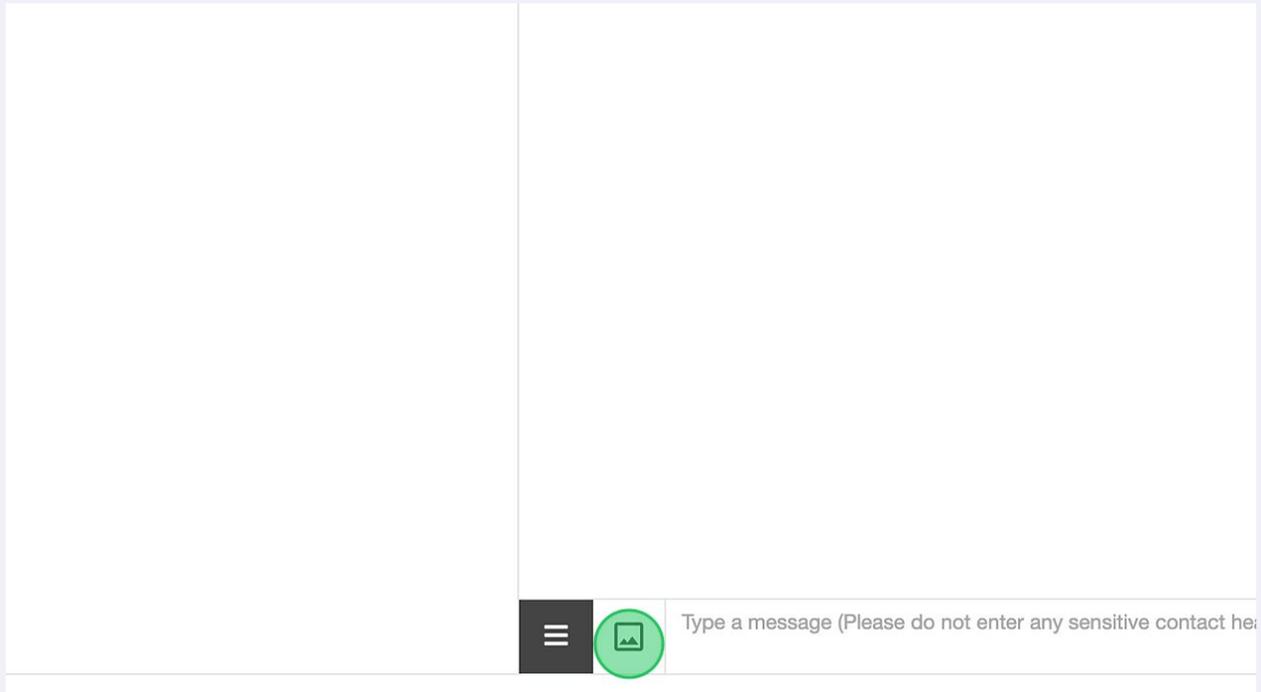
56 When the window opens you can drag and drop the image file you would like to send.

Upload Image

Drag here or click here to select image from files.
.jpeg and .png only. Max file size of 5MB.

CLOSE   UPLOAD
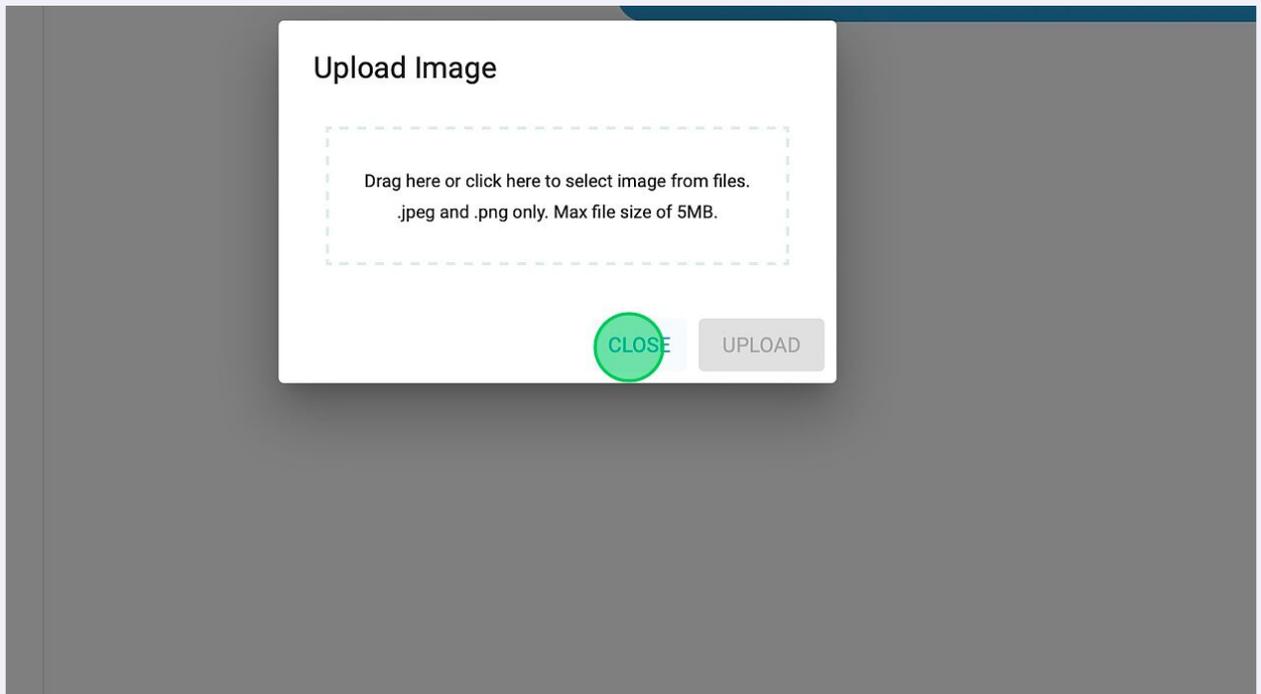
57 Our All inbox is just like it sounds, it contains all of your text messages in one place. All messages are displayed in chronological order, from newest to oldest.

Patient Communicator

Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts

Test

Focused   All   Filter ▾

⚑ Test

🗑

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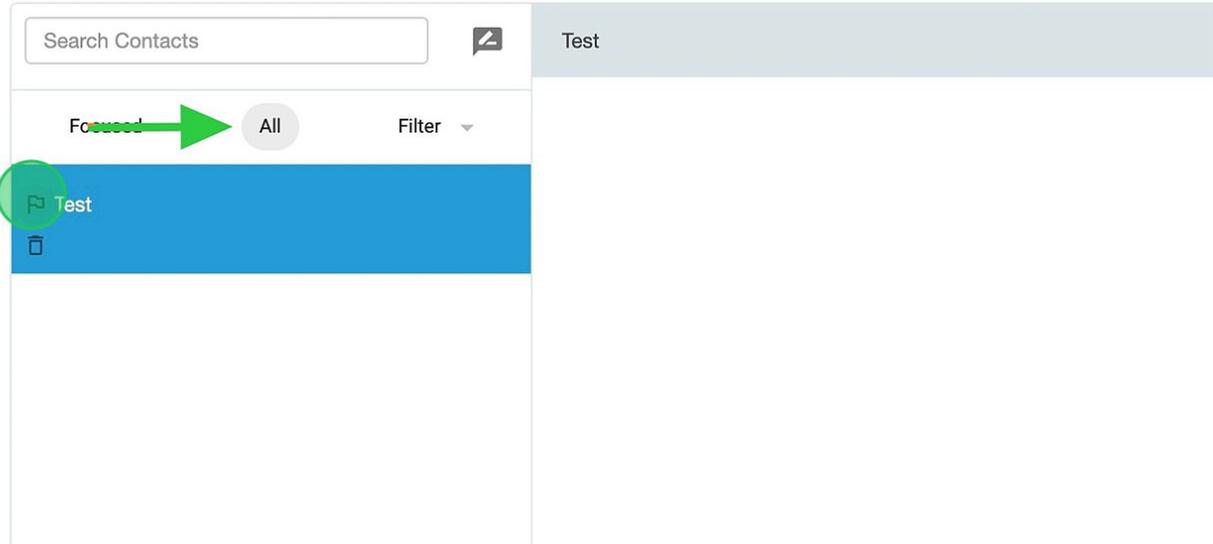
58 Messages can be flagged by clicking on the flag icon.

Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts

Test

Focused   All   Filter ▾

⚑ Test
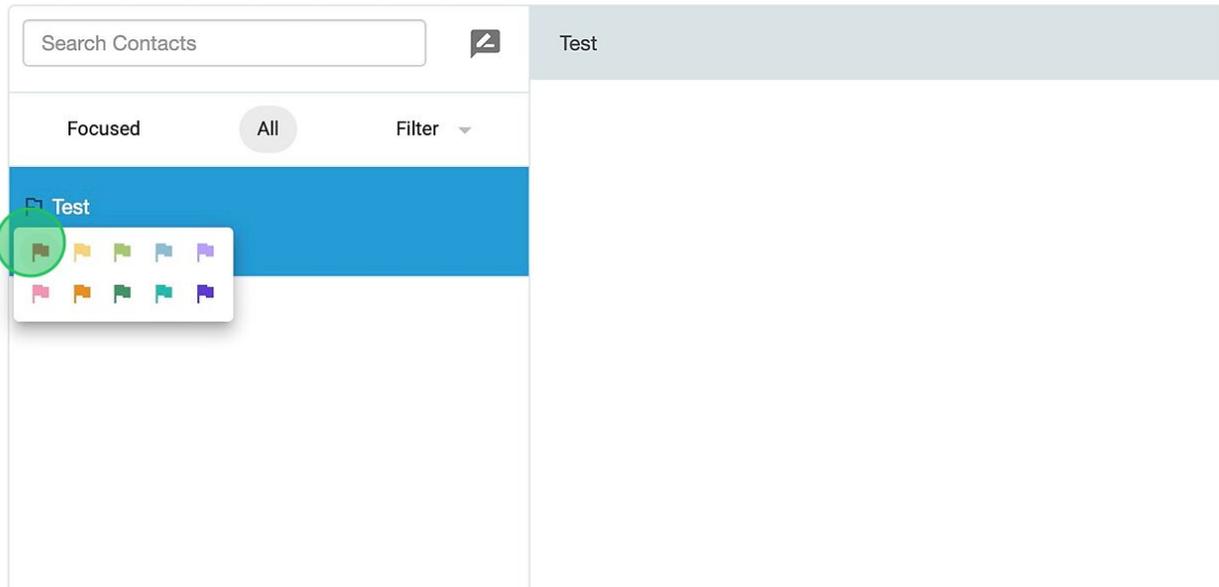
59 Click on the trash bin icon to delete messages. Deleting will delete the entire thread of the conversation.
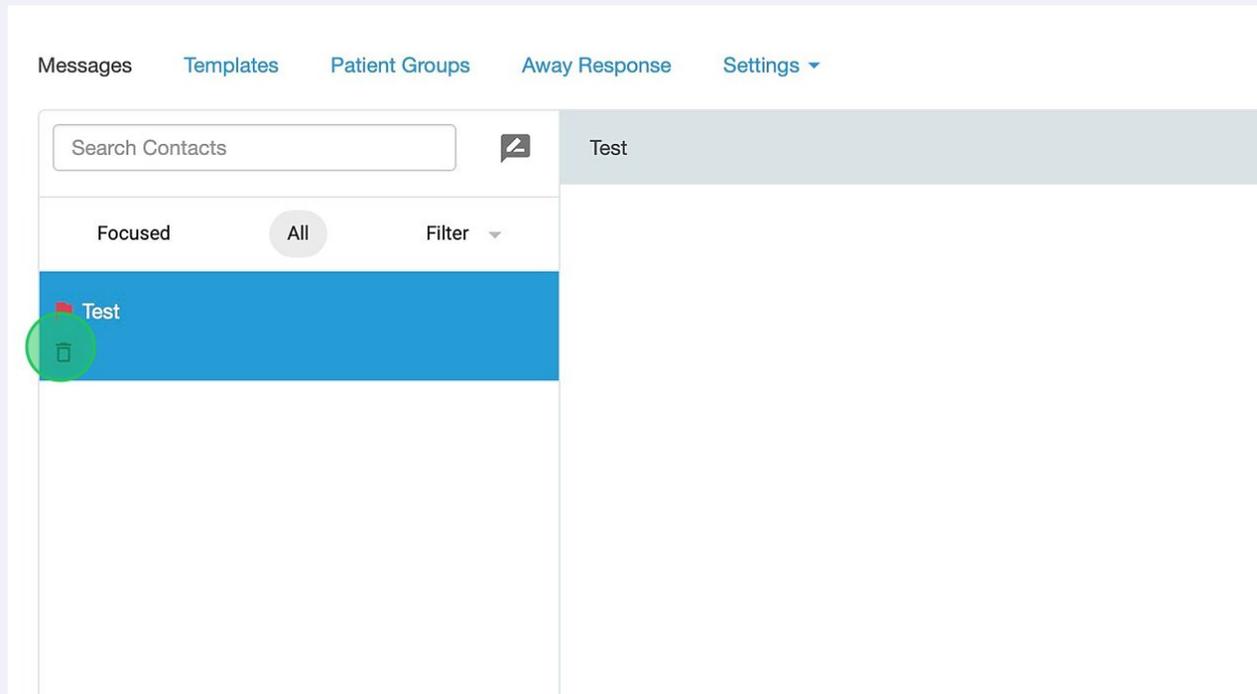
60 Messages can be filtered by flagged and unread by clicking on the 'FILTER' menu.
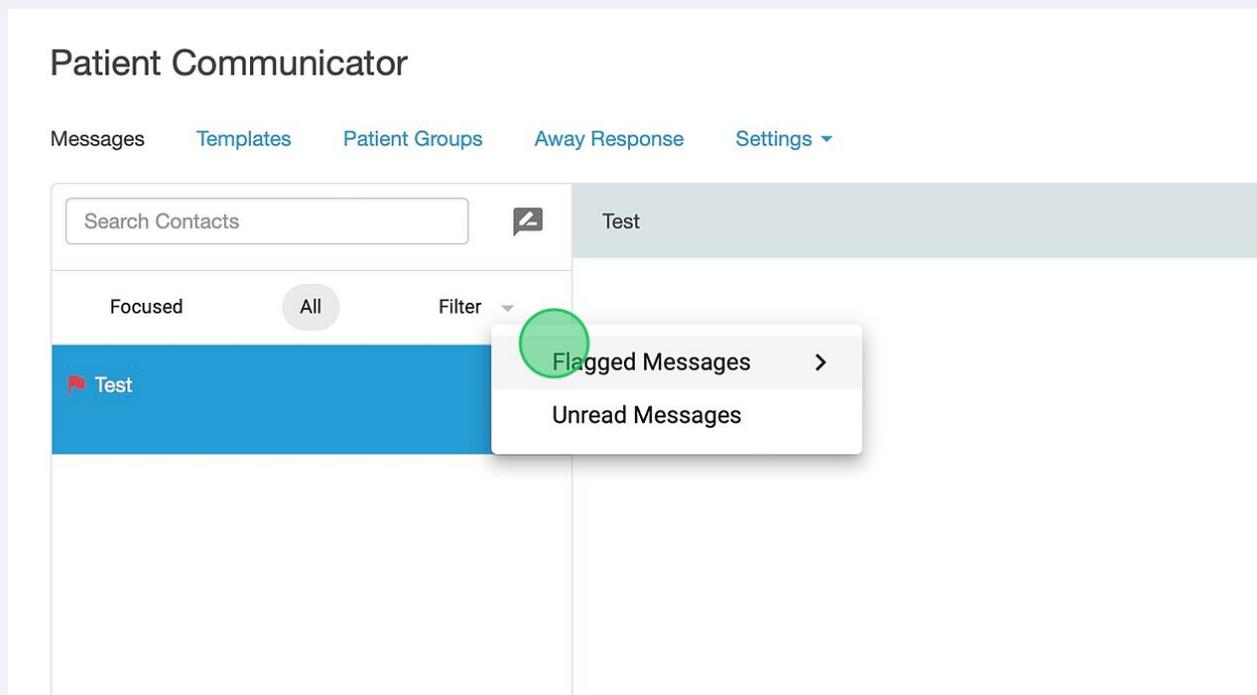
61 Focused inbox prioritizes conversations. Types of conversations you will you find in the Focused inbox: Patient interactions, Staff interactions, Flagged Messages, Unread Messages.

Conversations that will not be in your Focused inbox: automated messages.

Patient Communicator

Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts

Focused   All   Filter ▾

New Message

🚩 Test

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62 Click 'TEMPLATES' to add templates and edit existing templates.

Patient Communicator

Messages   Templates   Patient Groups   Away Response   Settings ▾

Search Contacts

To:

Focused   All   Filter ▾

New Message

🚩 Test

63 Click on "Broadcast" to mass text to a segment of patients that are, or were, on your calendar. This includes patients that are on your calendar for up to 30 days in the future, and patients that were on your calendar in the past (how far in the past will depend on when service was activated).

BROADCAST

64 Click 'SELECT FROM SCHEDULE'
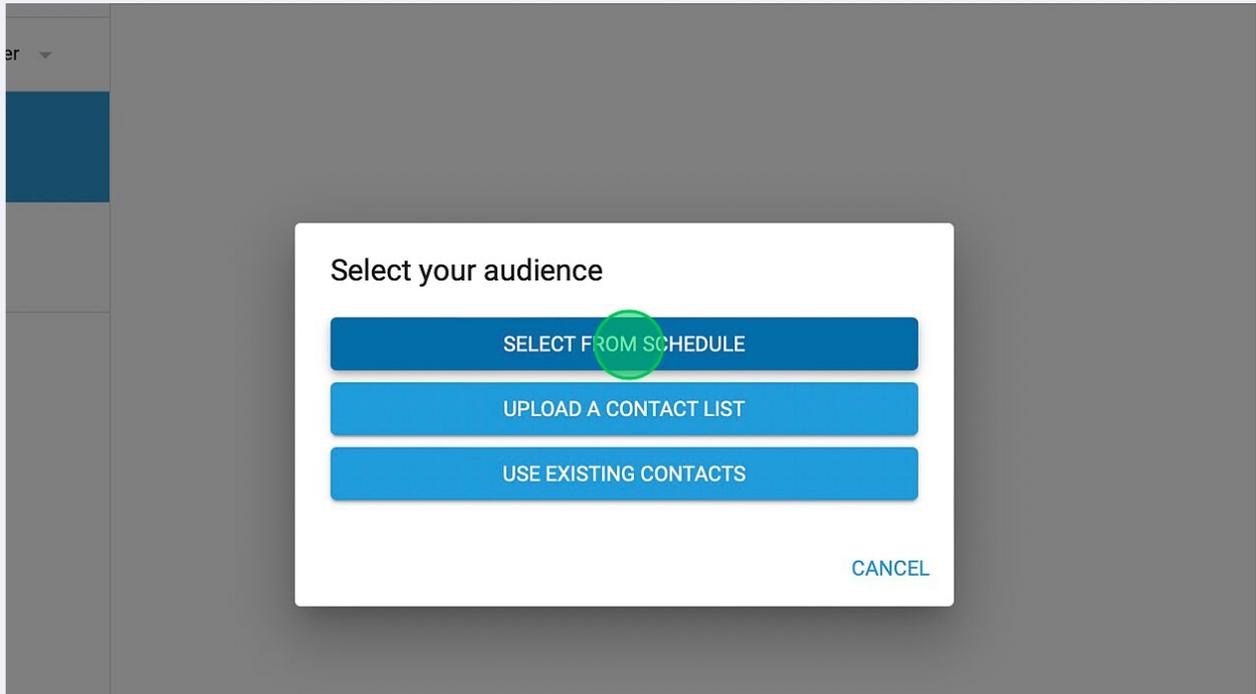
65 You can select the date range of appointments that you would like to include in the Mass Text. All patients that are not marked as Cancelled or No Show will be included in text message. If needed you will be able to select patients by 'patient group' here.
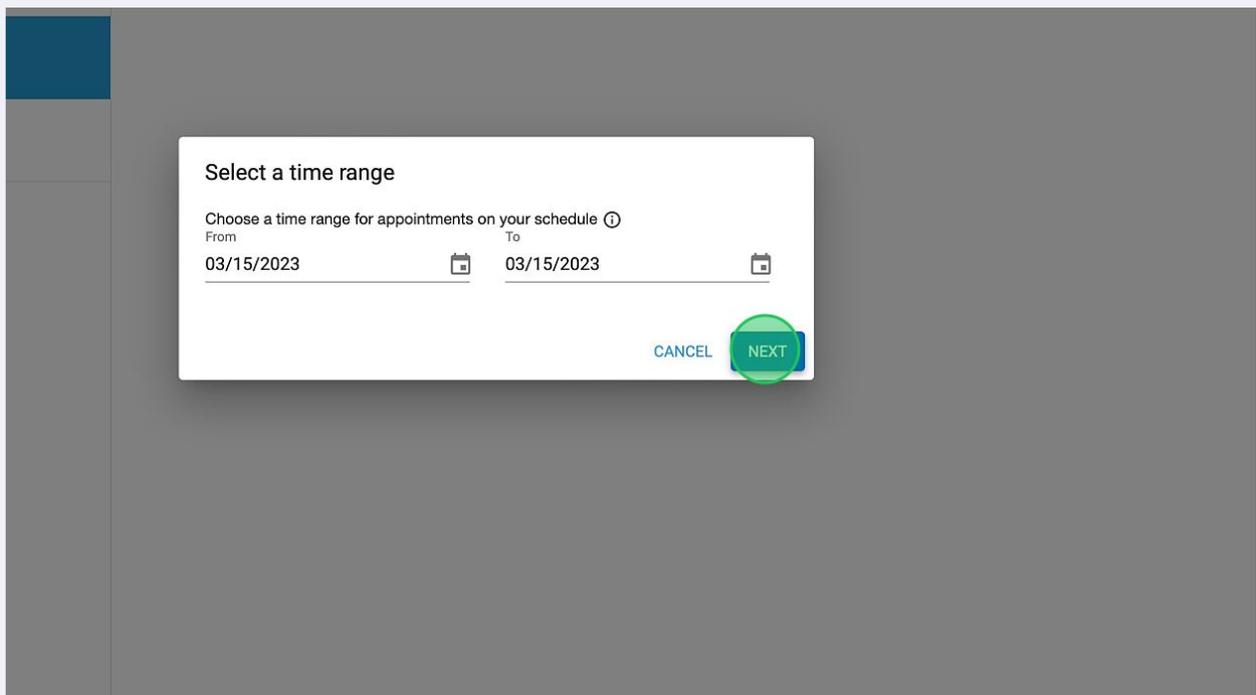
66 You can also broadcast by uploading a contact list or use existing contacts.
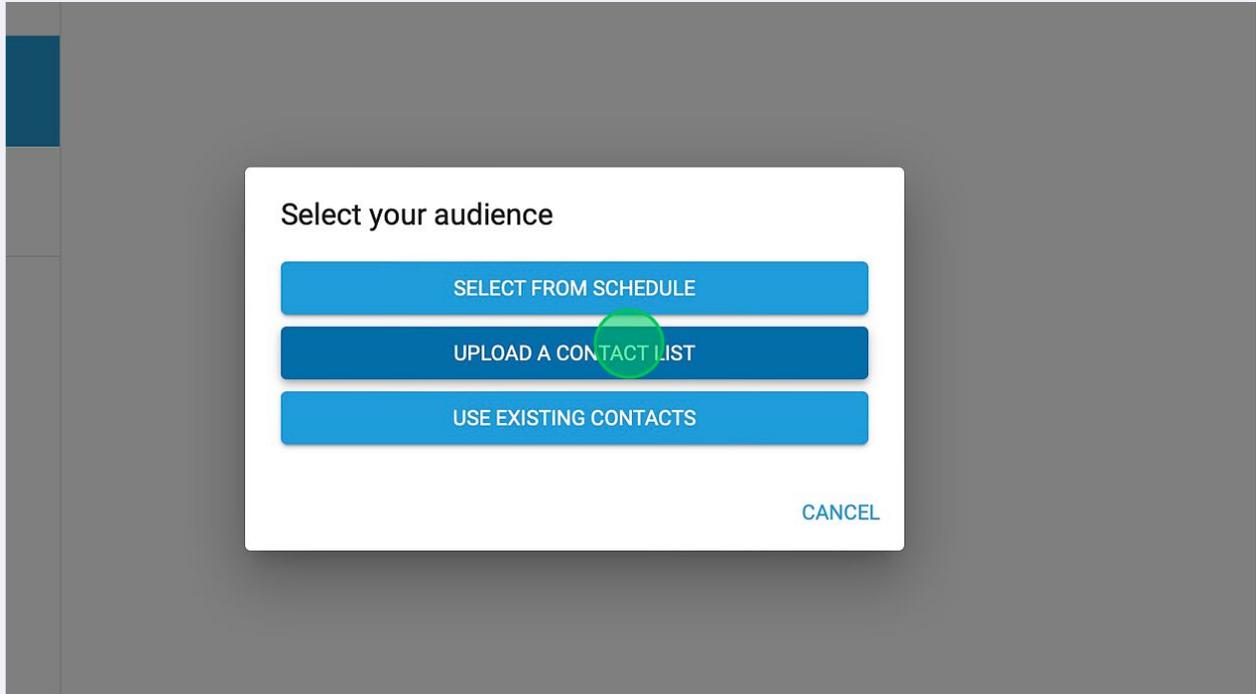
67 Click 'BROADCAST'
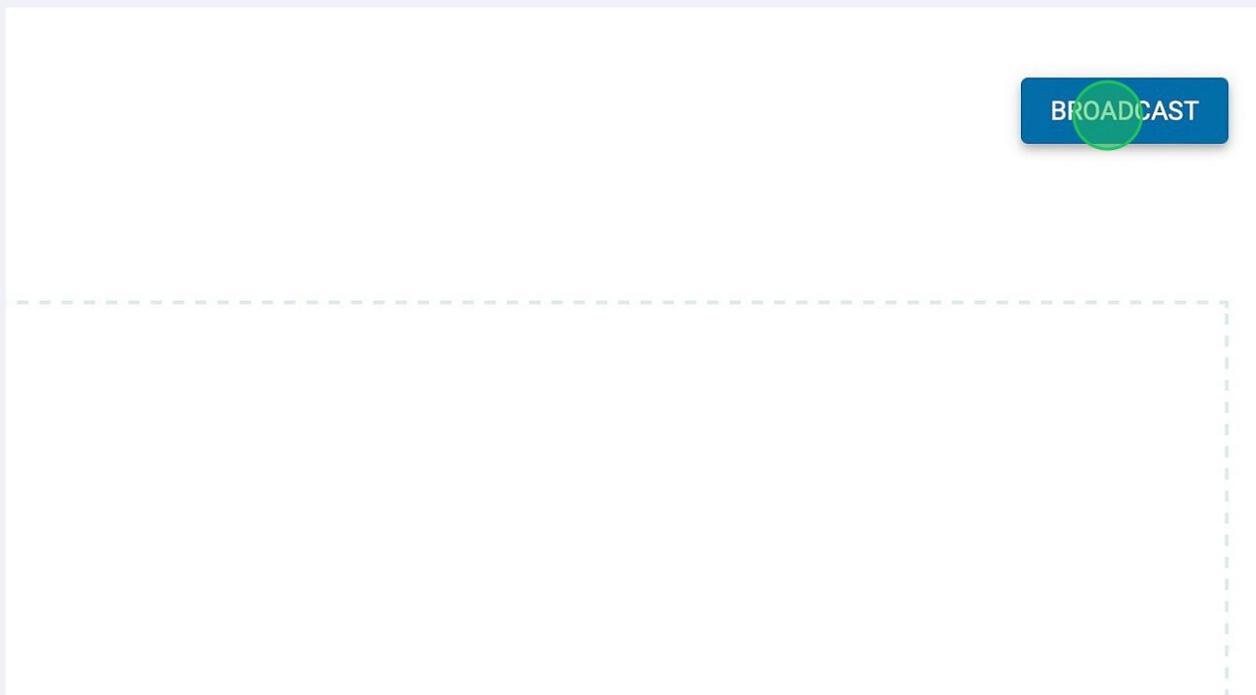
68 Compose the message. You can use template or type in content. To use variables place cursor where you would like variable to go and then click the blue variable. Once done composing click next.

69 Click 'AWAY RESPONSE' to edit your after hours text response.

70 Click 'EDIT OFFICE HOURS HERE' Be sure to edit office hours. Then compose away response.

Patient Communicator

Messages   Templates   Patient Groups   Away Response   Settings ▾

⚠ Hours not set: Edit office hours here

Away Response Settings ⓘ   [OFF | **AUTO** | ALWAYS-ON]

Away Response

71 In settings you can turn notification sound on/off.

Templates   Patient Groups   Away Response   Settings ▾ ⬅

    Upload Contacts

tacts

    Notification Sound ON

All   Filter ▾

sage

72 REVIEW: To Manage Reviews click on the 'REVIEW' tab.
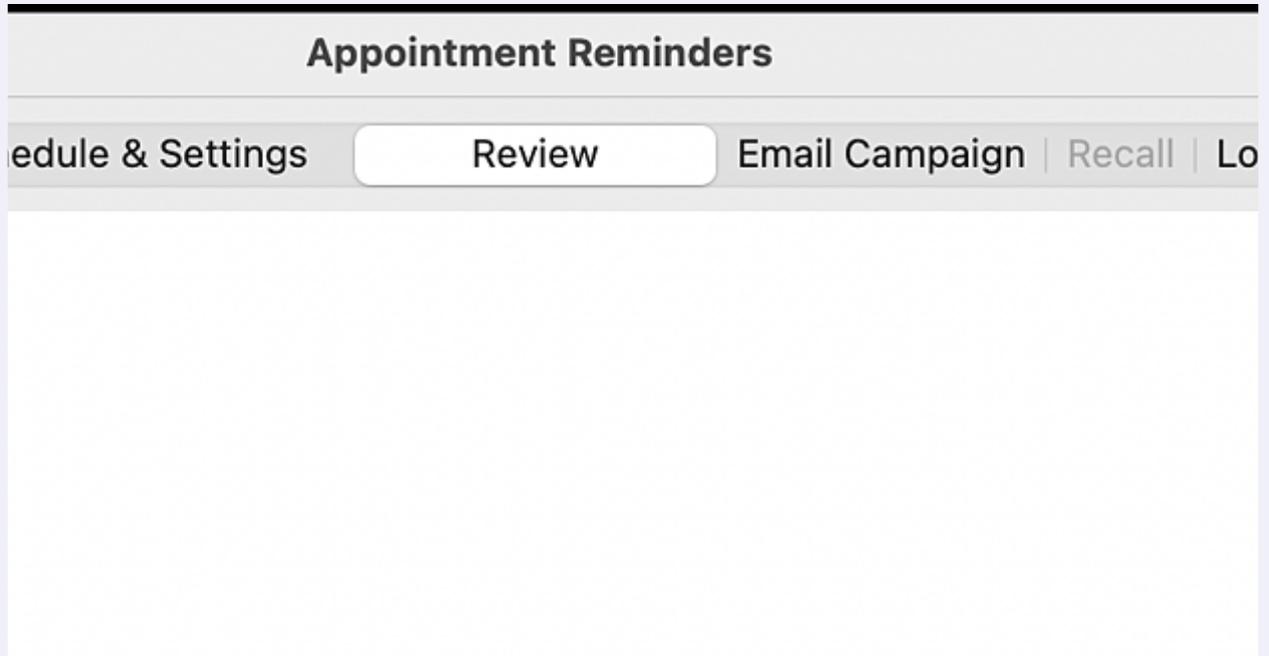
73 In Overview you will see recent reviews, patient experiences and you are able to quickly send a review.
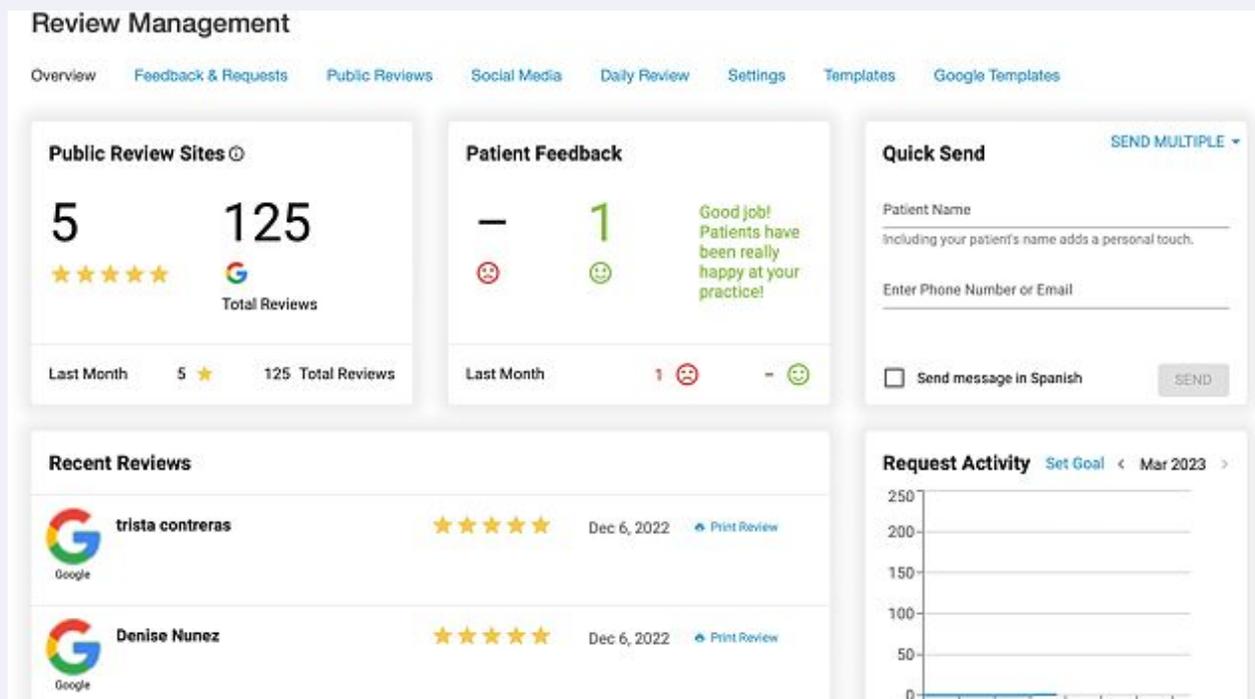
74 Feeback & Requests: You are able to see all patients that have been contacted and how they interacted with the message. In the green 'Request Activity' you will find a list of all patients that the practice has sent a message to. In the blue 'Feedback' you will find the internal feedback from the patient. When a patient clicks on the 'How can we improve' button on the request the feedback comes directly to the dashboard for the office only.

The '①' indicates that patient clicked on a link to a review site, and if you hover the mouse over it you can see which link they clicked on.

75 You can also send Request within Feedback and Request tab by Clicking on Send Request or Send Multiple.

Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

SEND REQUEST   SEND MULTIPLE ▾

1 total	Feedback	0 total
Activity		
☺		
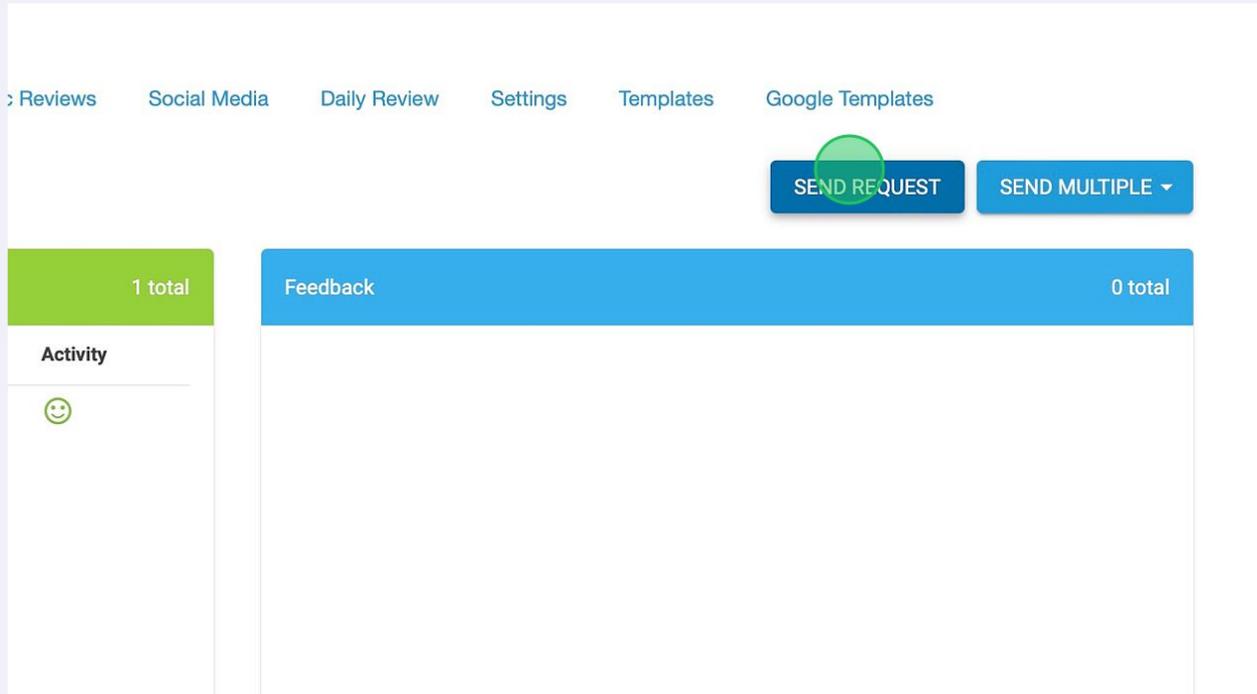
76 Complete the Request a Review window and click Send.
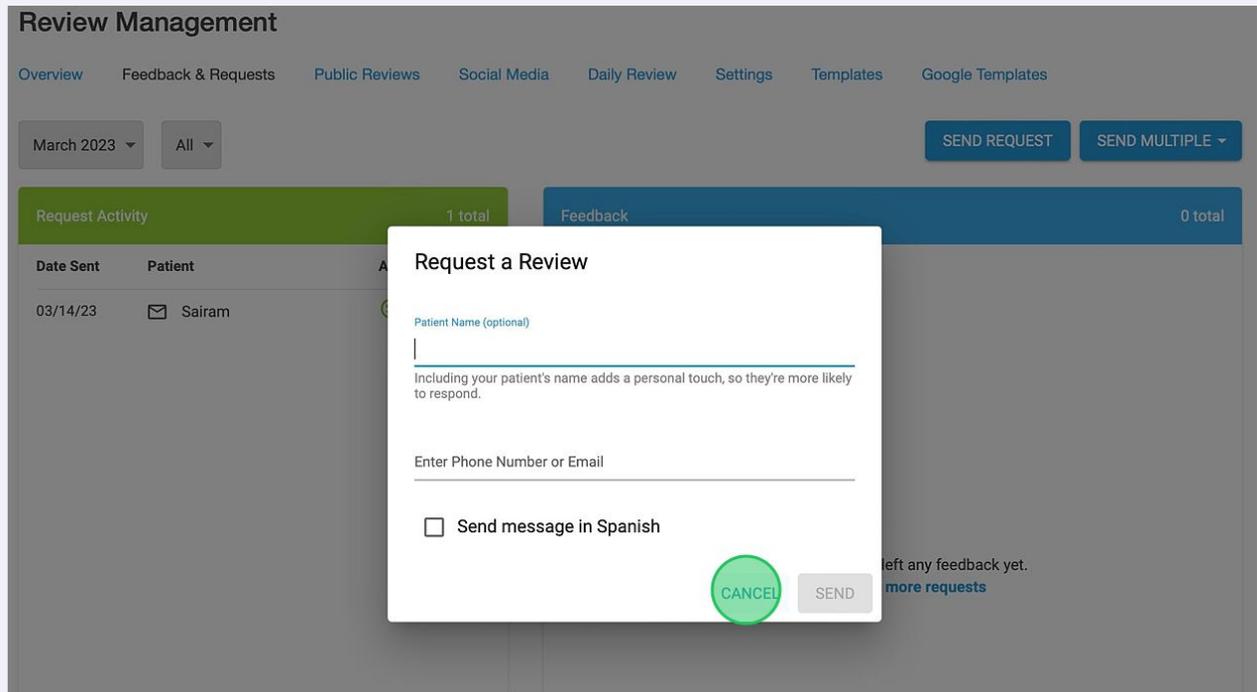
Review Management

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

March 2023 ▾   All ▾

SEND REQUEST   SEND MULTIPLE ▾

Request Activity   1 total

Date Sent	Patient	A
03/14/23	✉ Sairam	☺

Feedback   0 total

Request a Review

Patient Name (optional)

Including your patient's name adds a personal touch, so they're more likely to respond.

Enter Phone Number or Email

☐ Send message in Spanish

left any feedback yet.
more requests

CANCEL   SEND

77 Click 'SEND MULTIPLE'

Tops Orthodontics Practice ▾

Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

SEND REQUEST   SEND MULTIPLE ▾

1 total	Feedback	0 total
Activity		
☺		

78 You can send multiple request up to 25 patients.

March 2023 ▾   All ▾

SEND REQUEST   SEND MULTIPLE ▾

Request Activity   0 total

Date Sent   Patient

03/14/23   ✉ Sairam

Send Multiple Review Requests

Patient Name (optional)
1. _____   Enter Phone Number or Email   ✕

2. Patient Name (optional)   Enter Phone Number or Email   ✕

3. Patient Name (optional)   Enter Phone Number or Email   ✕

4. Patient Name (optional)   Enter Phone Number or Email   ✕

5. Patient Name (optional)   Enter Phone Number or Email   ✕

ADD ROW

ny feedback yet.
e requests

☐ Send all in Spanish   CANCEL   NEXT

79 Click 'PUBLIC REVIEWS'

Review Management

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates   G

| March 2023 ▾ | | All ▾ |

Request Activity		1 total
Date Sent	**Patient**	**Activity**
03/14/23	✉ Sairam	😊

Feedback

80 If your Google and Facebook accounts are connected in the 'Social Media' section of the dashboard we are able to report the practice's reviews to you.

The filter gives you the ability to divide the review data. You also have the ability to respond to Google reviews by clicking the 'Respond' button on any of the reviews.

Messages | Schedule & Settings | Review | Email Campaign | Recall | Location Settings

5.0/5
★★★★★
125 Reviews

+0 Last 30 Days

Please connect your **Social Media**

This information is currently unavailable.
Connect your Social Media

G Google (125 reviews)   **Connect**
f Facebook (0 reviews)   **Connect**

Filter	Clear All
Date Range	
All Time ▾	
Source	
Google (125)	☐
Rating	
5 Stars (125)	☐
4 Stars	☐
3 Stars	☐
2 Stars	☐

G **Marcella Mirafuentes**   ★★★★★   Dec 6, 2022   🖶 Print Review

G **Denise Nunez**   ★★★★★   Dec 6, 2022   🖶 Print Review

G **trista contreras**   ★★★★★   Dec 6, 2022   🖶 Print Review

81 Click on 'SOCIAL MEDIA' to connect accounts.

Having the practices Facebook account connected allows us to display all your reviews in the 'Public Reviews' section.

Having the practices Google account connected has 3 main benefits:

Alerts you of any new Google reviews
Gives you the ability to respond to reviews from the dashboard
Displays all your reviews in the 'Public Reviews' section

Review Management

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

Connected Accounts

f Connect with Facebook

G Connect Google My Business

Benefits of Connecting your Social Media Accounts

👁 Keep an eye out for any negative reviews so you can address them promptly

✏️ Auto respond to your Google reviews to save staff time from responding to your Google reviews

⭐ Have all your public reviews in one place

Note: Connecting your accounts is not required to use your Review Generator product nor is it required to send out requests. Your Review Generator product is currently live and you can start sending out requests to patients right away

82 Click on 'SETTINGS' to turn on/off Reviews and customize settings.

omate Review Requests ⓘ | NONE | DAILY REVIEW | **FULLY AUTOMATED** |

None: You will receive a daily email with eligible review requests and you can send at your leisure. No messages are sent automatically.

Daily Review: You will receive a daily email with eligible review requests. If you don't make any changes the list will be sent toward the end of the business day automatically on your behalf.

Fully Automated: Company will automatically send review requests on your behalf

Hides direct-feedback option when patient had positiv

Auto publishes all your reviews to your Facebook pag
(requires that you connect your Facebook page from the Social Med

Shows your location logo on the review request

w Location Name: Shows your location name on the review request

able Reminder: Disables review request reminders. Reminders are us
the patient has not interacted with the request

cent Sent Period: 60 ▾   The time in days since last review request that a patie
request

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83 Click on 'TEMPLATES' to edit the text and email messages that are sent.

Review Management

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates

Review Request Templates

Review Request 1 day after appointment ⚙	Select a schedule or template
Text	
Email	

84 Click the 'GEAR' to change the intervals and if you are sending a Text or Email. If you have created patient groups you can select in the filter for the specific group you would like your automated request to be sent.

Review Management

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates   Google Templates

Review Request Templates

Review Request 1 day after appointment ⚙	Editing Review Request Schedule
Text	Friendly Name
Email	Contact Method

☑ Text   1 ⇕ [HOURS] [DAYS] after appointment

☑ Email

Filters:

Rule
Only send ▾   this message to   Patient Group
All patients ▾

[SAVE] [HISTORY]

85 Click Text or Email to edit the message.

Overview   Feedback & Requests   Public Reviews   Social Media   Daily Review   Settings   Templates

Review Request Templates

Review Request 1 day after appointment ⚙	ENGLISH SPANISH FRENCH
Text	Editing Schedule Template
Email	Variables ❓

First Name **Last Name** Location Name Request Link

Hi First Name, thanks for visiting Tops Orthodontics Practice ! Can you give feedback about your visit by clicking this link: Request Link STOPtoOptOut

151/464

[SAVE]   [BACK]

86 Click on Google Templates to customize your Google response template.

Customize your Google Response Template

SAVE RESPONSES

Good rating #1 (4/5 stars)

Thank you for your review! We are so happy that you had a positive experience. We love that we were able to provide you with an amazing experience. Looking forward to seeing you at your next visit!

Good rating #2 (4/5 stars)

Really appreciate the feedback! We are so delighted to hear that you had a great experience.

Good rating #3 (4/5 stars)

Thank you for the great review! We are so happy to hear that you were satisfied with your experience at our office. We hope to see you soon again :)

Good rating #4 (4/5 stars)

Good rating #5 (4/5 stars)

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87 EMAIL CAMPAIGN: Click 'EMAIL CAMPAIGN' Email Campaigns can be used for newsletters, marketing flyers and announcements.

Appointment Reminders

Messages | Schedule & Settings | Review | Email Campaign   Recall | Location Settings

Tops OTesting ▼

s   Settings   Patient Groups

s

vn   New Patient Welcome   Newsletter I   Newsletter II

AME   Hi Jimmy!   This month at General Practice!

WELCOME

88 Click 'TEMPLATES' and then click 'SELECT' on the template that you would like to use. You are able to edit all the contents of the message (to upload your practice logo go to settings in Email Campaign).

89 To add recipients click 'TO' then select All Active Patients / All Patients / Select Patients from Schedule / Upload Contacts / Individual Patients.

90 All Active Patients: This option will select all patients that are marked as 'Active' to receive the email campaign.

All Patients: This option will select all patients to receive the campaign email.

Upload Contacts: This option gives you the ability to upload an Excel / CSV file of patients to receive the email campaign.

Select Patients from Schedule: This option gives you the ability to send a message to segments of patients based on appointment date.

Individual Contacts: This option gives you the ability to search for patients one by one to add to the email campaign.
You can edit the subject, title, and body of the email, and a preview of the email will be displayed on the right.

Now you can send the campaign immediately by clicking the 'SEND' button, or you can schedule it to be sent at a later time by clicking the 'SCHEDULE' button. To quickly test the campaign you have created we give you the ability to send it to registered users of your account by clicking the 'TEST' button.

91 Click 'MY CAMPAIGNS' to see all past campaigns and scheduled campaigns.

Campaigns

Templates   My Campaigns   Settings   Patient Groups

Default Templates

Create Your Own	New Patient Welcome	Newsletter I
COMPANY NAME	WELCOME	
YOUR SLOGAN HERE		
Hi Jack!	Hi Jimmy!	This month at General Practice!
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.	We welcome you as a new patient to our office. We appreciate the confidence you place in us as your healthcare provider, and thank you for choosing us! To have an excellent experience while visiting our office we ask that you arrive early for your scheduled	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

92 Here you can preview, replicate, or cancel the campaigns, as well as see the recipient list.

Campaigns

SETTINGS   CREATE CAMPAIGN

Date ↑	Subject	Patient Reach	Actions
4/24/2020 6:41pm	Welcome to the Emtopher's Incredible Dental Palace family!	9 (pending)	PREVIEW ▼
4/22/2020 3:25pm	Monthly Newsletter from Emtopher's Incredible Dental Palace	9 (sent)	PREVIEW ▼
4/21/2020 5:50pm	Happy Holidays from Emtopher's Incredible Dental Palace	9 (sent)	PREVIEW ▼
4/20/2020 6:11am	Welcome to the Emtopher's Incredible Dental Palace family!	9 (sent)	PREVIEW ▼

93 Click 'SETTINGS' to edit practice information and upload logo.

Campaigns

Templates   My Campaigns   Settings   Patient Groups

Default From - Name
Tops OTesting

Default Reply-to
april.lowry@practicetek.com

Default BCC

Default Footer
230 W 3rd Ave , Escondido, CA 92025 +17604890330

SAVE

Location logo upload has moved here.