

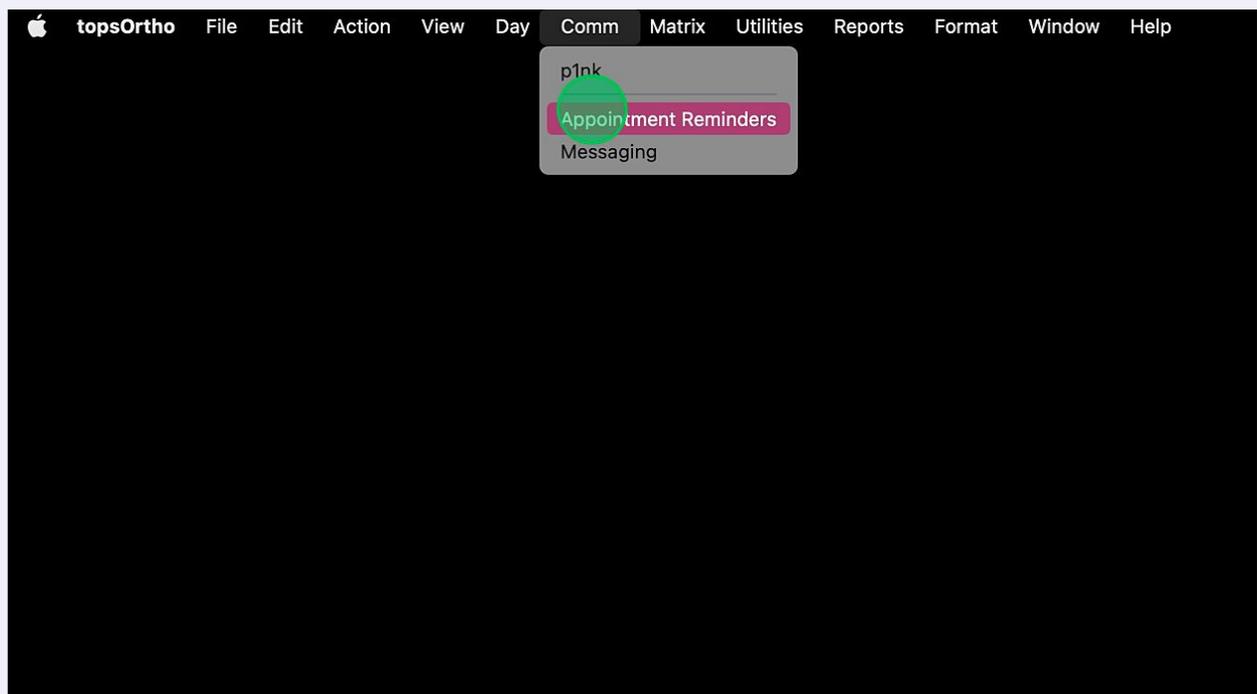
Tops DPX Requirement

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

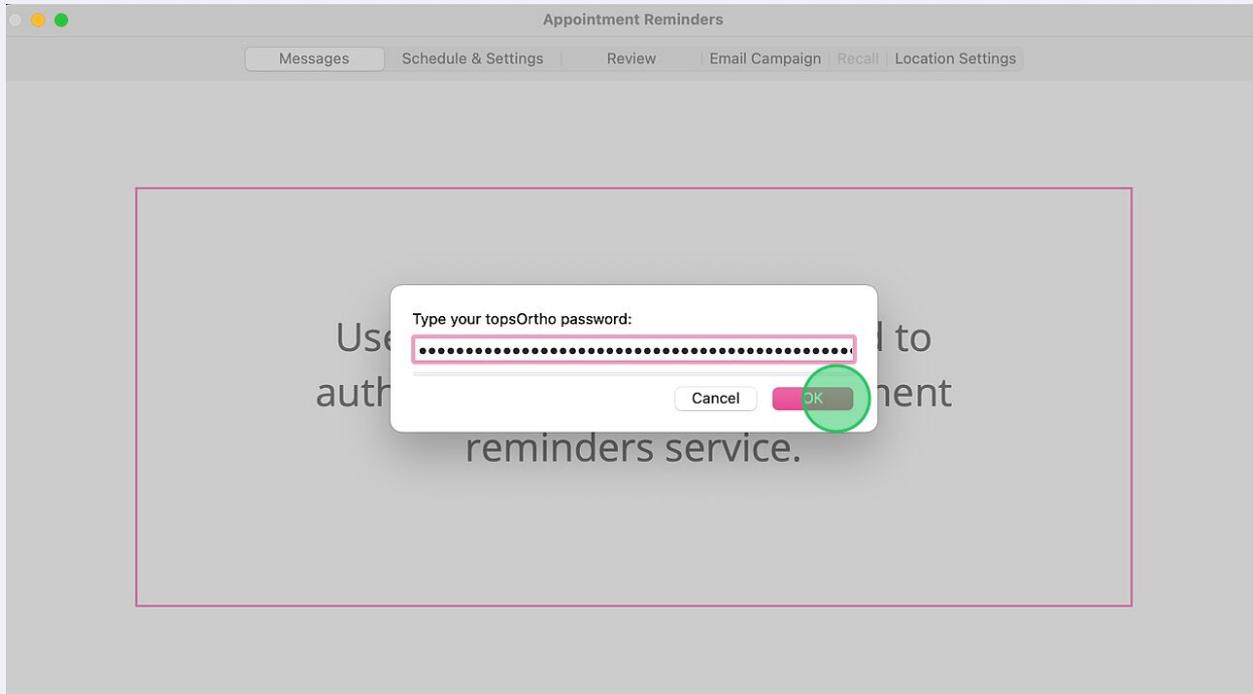
Helpful hints on how to use this document.

- 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

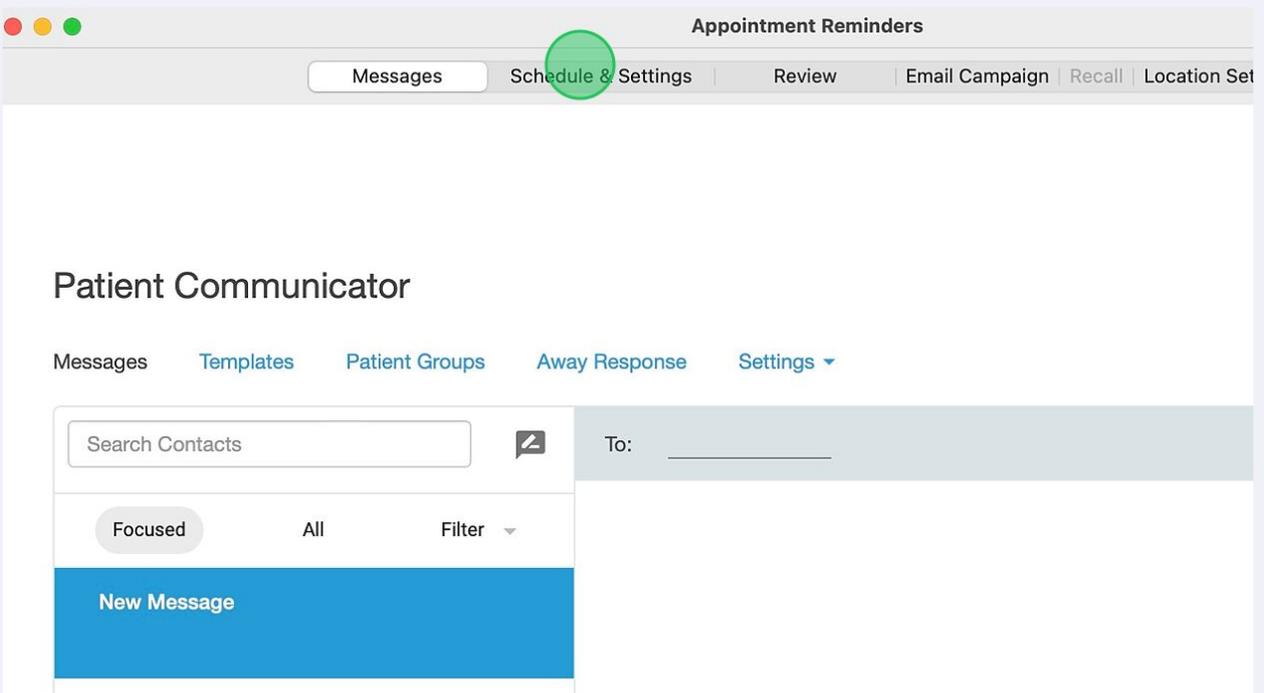
- 3 ACCESSING APPOINTMENT REMINDERS: Launch Tops on your workstation. Click on the 'COMM Menu and choose 'APPOINTMENT REMINDERS'.



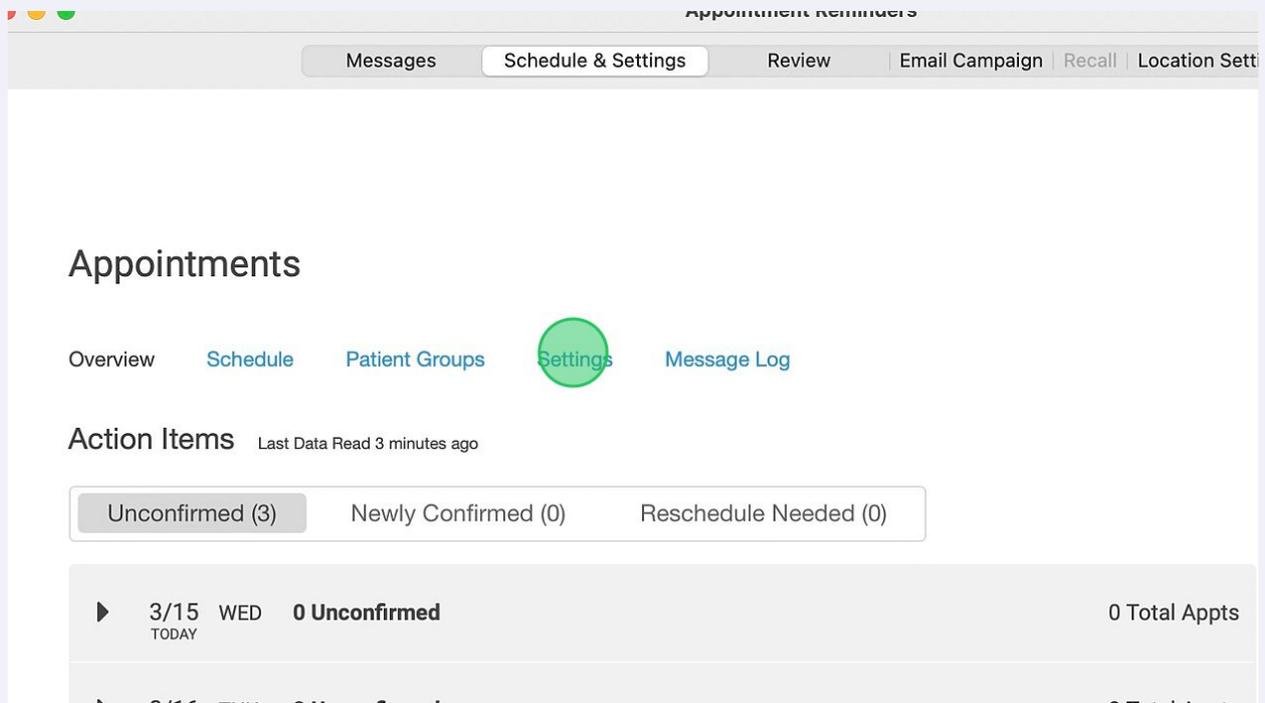
4 Enter your Tops password and select 'OK'.



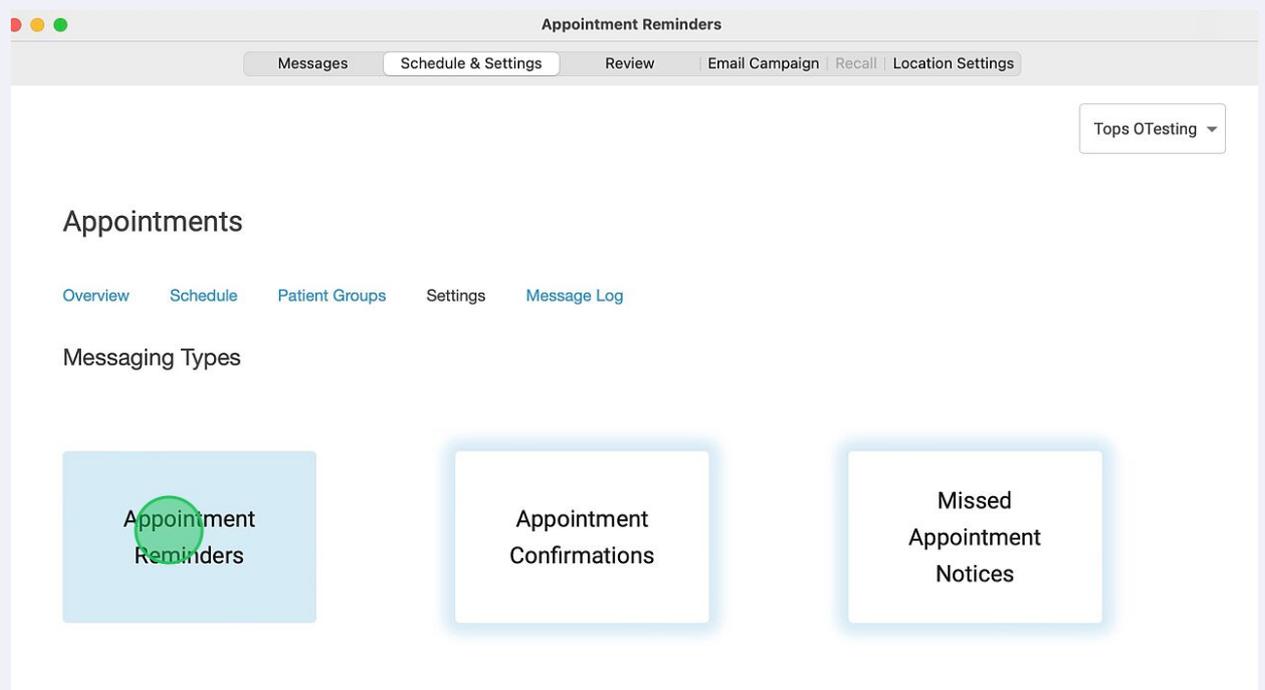
5 APPOINTMENT REMINDER SETTINGS: Once the Appointment Reminders window opens you will click on the 'SCHEDULE & SETTINGS' Tab.



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



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



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 	<h3>Editing Appointment Reminder Schedule</h3> <p>Friendly Name</p> <hr/> <p>Contact Method</p> <p><input checked="" type="checkbox"/> Text 30 <input type="button" value="HOURS"/> <input type="button" value="DAYS"/></p> <p><input checked="" type="checkbox"/> Email</p> <p>Filters:</p> <p>Rule: <input type="text" value="Only send"/> this message to <input type="text" value="All"/></p>
Appointment Reminder 1 hour before appointment 	
Text	
Family Text	

10 Click 'SAVE' once you are done editing.

Appointment Reminder
1 hour before appointment

Text

Family Text

Email

Family Email

Appointment Reminder
30 days before appointment

Text

Email

Filters:

Rule
Only send

this message to

Patient Group
All patients

SAVE HISTORY

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

Text

Editing Appointment Reminder Schedule

Friendly Name

Contact Method

Text 30 HOURS DAYS BEFORE AFTER

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

SAVE BACK

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

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	ENGLISH SPANISH FRENCH
Text	Editing Schedule Template
Family Text	Variables ?
Email	First Name Last Name Location Phone Number
Family Email	Location Name Weekday Month Day Time Short Date
Appointment Reminder 1 hour before appointment	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
Text	142/320
Family Text	

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

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

Variables ?

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.

← Back to Messaging Types

Confirmation Request Reminder
5 - 4 days before appointment

Text

Family Text

Confirmation Request
7 - 4 days before appointment

Text

Family Text

Confirmation Request
3 - 2 days before appointment

Editing Confirmation Request Schedule

Friendly Name

Contact Method

Call Starting 3 HOURS DAYS before appointment

Text For a total of 1 days

Email

SAVE HISTORY

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.

Editing Schedule Template

Variables ?

First Name Last Name Location Phone Number Location Name Weekday

Month Day Time

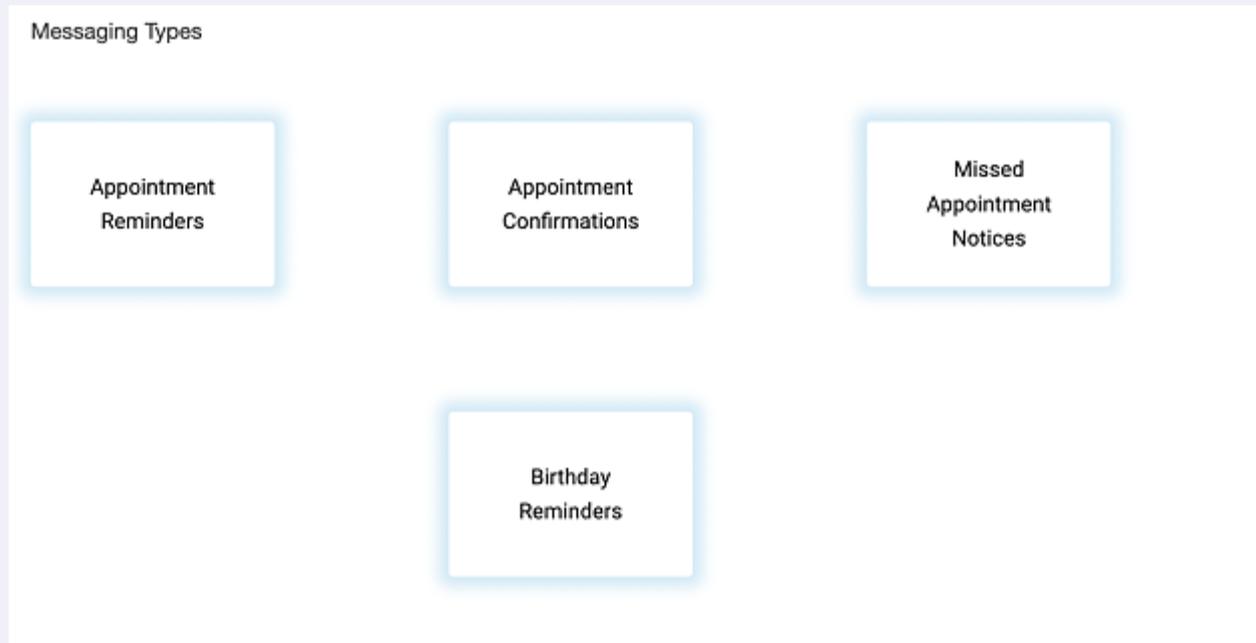
Hi First Name, this is Tops DPX Demo calling to confirm your appointment for Month Day at HH:MM,AM/PM. Press 1 to confirm or give us a call at (770) 627-2527 to reschedule. Press 0 to hear this message again

207/450

SAVE TEST CALL BACK

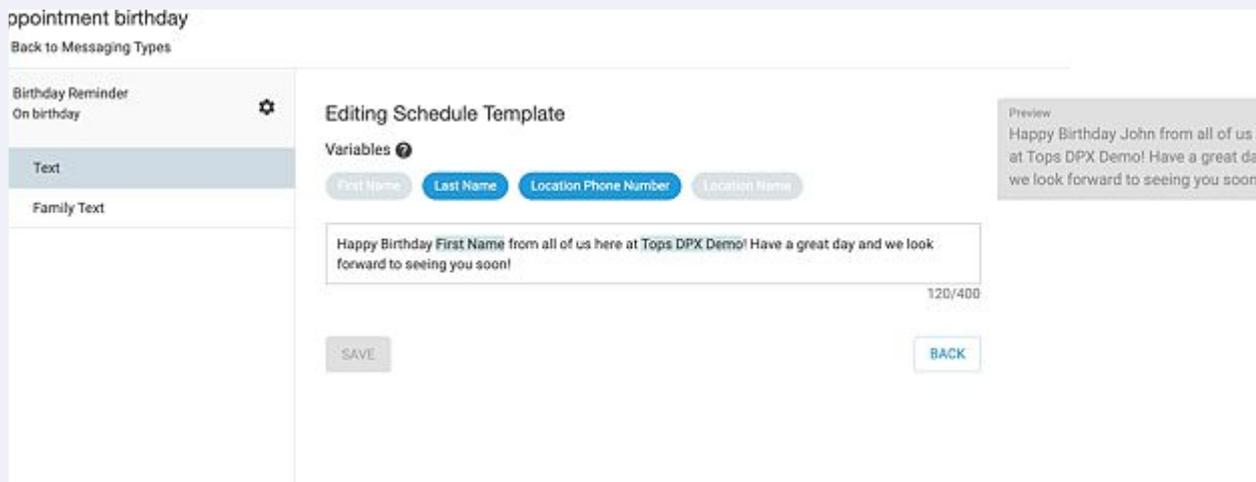
18

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'.



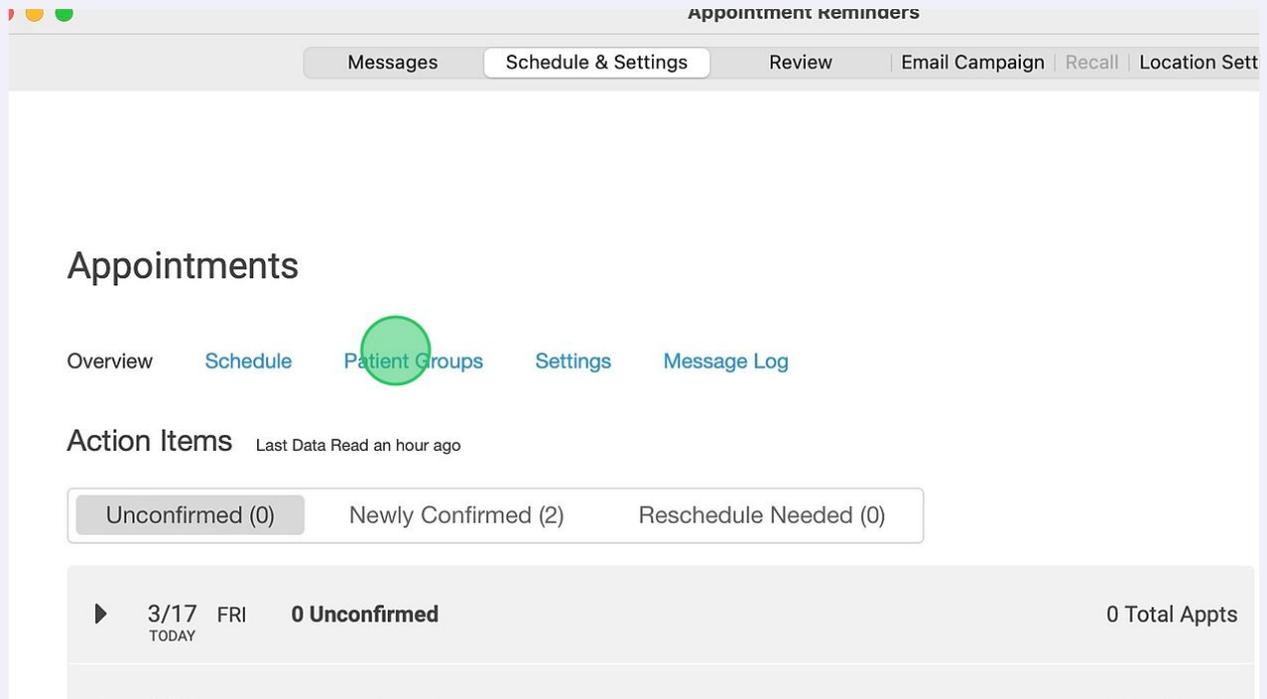
19

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.



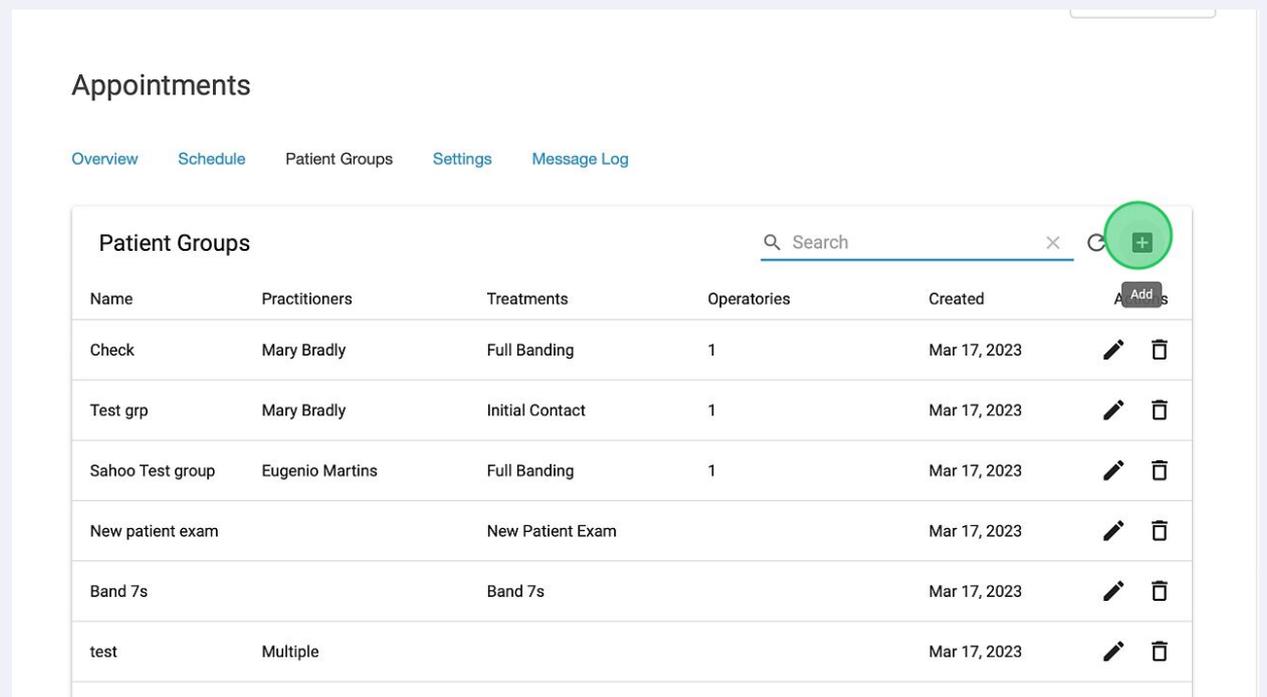
20

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.



21

Create a new patient group by selecting the + button in the upper right hand corner.



22

Name the group by clicking into the Name field. 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.

The screenshot shows the 'Patient Groups' interface. At the top, there are tabs for 'Overview', 'Schedule', and 'Patient Groups'. Below the tabs is a table with columns for 'Name' and 'Practitioners'. A green circle highlights the 'Name' field in the first row. A dropdown menu is open, showing a list of appointment types with checkboxes: Appliance Impression, Band 7s, Band Uppers, CONSULT, Consultation, Full Banding, Initial Contact, Invisalign Delivery, and New Patient Exam. To the right, there is a search bar and a table with columns for 'Operatories' and 'Created'.

23

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

The screenshot shows the 'Patient Groups' interface with the dropdown menu closed. The table now has columns for 'Name', 'Practitioners', 'Treatments', 'Operatories', 'Created', and 'Actions'. The first row has 'Consultation' in the Name field, 'Multiple' in the Practitioners field, 'Multiple' in the Treatments field, and '1' in the Operatories field. A green checkmark icon is visible in the Actions column, and a 'Save' button is highlighted below it. The other rows in the table are: '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), and 'test' (Multiple, Mar 17, 2023).

24

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

Tops OTesting ▾

atient 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.)

The screenshot shows a configuration form for a reminder. On the left is a sidebar with a gear icon. The main form includes:

- Friendly Name:** A text input field.
- Contact Method:** Two checked checkboxes for **Text** and **Email**. The **Text** checkbox is followed by a numeric input set to **30**, and buttons for **HOURS** and **DAYS**. To the right are buttons for **BEFORE** and **AFTER**.
- Filters:** A section with a **Rule** dropdown set to **Only send**, the text **this message to**, and a **Patient Group** dropdown set to **All patients**.
- Buttons:** **SAVE** and **HISTORY** buttons at the bottom.

26

RECALL: Click 'RECALL' to edit settings.

The screenshot shows a 'RECALL' interface with a navigation bar at the top containing: Messages, Schedule & Settings, Review, Email Campaign, **Recall** (highlighted with a green circle), and Location Settings. On the right, there is a dropdown for 'Tops OTesting' and a bell icon. The main content area includes:

- A **Daily Review** link.
- An **Automated** toggle switch that is turned on, with an information icon.
- A blue **MANAGE TEMPLATES** button.
- A light blue notification box: **Treatments are being gathered, please check back shortly**.
- A table header with columns: **all Active**, **Treatments**, **Friendly Name**, and **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.

The screenshot shows the 'Recall' settings interface. At the top, there are tabs for 'Settings' and 'Daily Review'. Below this is the 'Recall Templates' section with a 'Back to Recall Settings' link and an 'Automated' toggle switch. A sidebar on the left lists four recall templates: 'Upcoming Due Recall' (30 days before due date), 'Past Due Recall' (1 day after due date), 'Past Due' (45 days after due date), and an 'Email' template. The main area is titled 'Editing Schedule Template' and shows a 'Variables' section with buttons for 'First Name', 'Last Name', 'Location Phone Number', 'Location Name', and 'Treatment Name'. A text preview box contains the message: 'Hi First Name, you're almost due for next Treatment Name. Call (760) 489-0330 to schedule today! - Tops OTesting. ReplySTOPoptout'. A 'Preview' window on the right shows the rendered message: 'Hi John, you're almost due for next Routine Appointment. Call (760) 489-0330 to schedule today! - Tops OTesting. ReplySTOPoptout'. At the bottom, there are 'SAVE' and 'BACK' buttons.

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.

The screenshot shows the 'Recall' daily review interface. At the top, there are tabs for 'Settings' and 'Daily Review'. Below this is a date selector showing 'May 17, 2023'. The main section is titled 'Upcoming Due Recall | Due Date: 2023-06-17'. Below this is a table with columns for 'Patient' and 'Phone'. The table contains one row for 'Molly Dragos' with phone number '(770) 430-9309'. A grey tooltip above the 'Phone' column for Molly Dragos says 'Either patient has unsubscribed or we are unable to find the email'. The 'Phone' column for Molly Dragos shows 'Not available' with a circled 'i' icon. A green checkmark is visible in the bottom right corner of the table.

29

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

Appointment Reminders

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

Tops OTesting ▾

ent

ests | Public Reviews | Social Media | Daily Review | Settings | Templates | Google Templates

reviews

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

Name
Tops OTesting

SMS Display Na...

Address
230 W 3rd Ave

Suite

City State Zip
Escondido CA 92025

Phone Time Zone
+17604890330 America/New_York

UPDATE

Location Logo

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

SAVE

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'.

The screenshot shows a web application window titled "Appointment Reminders". At the top, there are navigation tabs: "Messages", "Schedule & Settings", "Review", "Email Campaign", "Recall", and "Location S". Below the tabs, the main heading is "Location Settings". Underneath, there are several sub-tabs: "Users & Practice Info", "Opt Out List", "Office Hours" (which is circled in green), "Roles & Permissions", and "Business Information". Below these tabs is a "Contacts" section with a search bar and a table with columns: "Name", "Email", "Phone", "Opted Out Products", and "Last Updated".

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.

The screenshot shows the "Office Hours" settings page. At the top, there are navigation tabs: "Users & Practice Info", "Opt Out List", "Office Hours" (which is active), "Roles & Permissions", and "Business Information". Below the tabs, there is a blue information banner with an information icon and the text: "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". Below the banner, there are sections for "Monday", "Tuesday", "Wednesday", "Thursday", "Friday", "Saturday", and "Sunday". Underneath, there is an "Add New Hours" section with a form to set hours for a specific day (Monday) and a time range (8:00 am to 6:00 pm). Below the form is an "ADD" button. At the bottom, there is an "Automated Message Settings" section with a description and a row of checkboxes for each day of the week, all of which are checked.

37

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

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

Monday	Tuesday	Wednesday	Thursday	Friday
Saturday	Sunday			

Add New Hours

Monday  Open

8 00 am to 6 00 pm

ADD

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** 

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	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](#)

40

SCHEDULE OVERVIEW: Click 'SCHEDULE & SETTINGS'.

Appointment Reminders

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

Communicator

Templates 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 TODAY	0 Unconfirmed	0 Total Appts
▶	3/16 THU	3 Unconfirmed	3 Total Appts

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

Overview Schedule Patient Groups Settings Message Log

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 TODAY	0 Unconfirmed	0 Total Appts
▶	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	Thu 03/16	Fri 03/17	Sat 03/18	Sun 03/19
0 unconfirmed 0 appts	3 unconfirmed 3 appts	0 unconfirmed 0 appts	0 unconfirmed 0 appts	0 unconfirmed 0 appts

Wednesday, March 15th

No appointments scheduled for this date.

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

Wednesday, March 22nd

45 Click 'MESSAGE LOG'.

The screenshot shows the 'Appointment Reminders' interface. At the top, there are tabs for 'Messages', 'Schedule & Settings', 'Review', and 'Email Campaign'. Below this, the 'Appointment Reminders' title is visible. A navigation bar includes 'Overview', 'Schedule', 'Patient Groups', 'Settings', and 'Message Log', with 'Message Log' highlighted in green. A date range 'Mar 15 - Mar 21 2023' is shown with left and right navigation arrows. Below the date range, there are summary boxes for each day: '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), and 'Mon 03/20' (0 unconfirmed 0 appts). At the bottom, there is a search bar with the text 'Kelly Hagen'.

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.

The screenshot shows the 'Message Log' interface. At the top, there are tabs for 'Overview', 'Schedule', 'Patient Groups', 'Settings', and 'Message Log', with 'Message Log' highlighted in green. Below the tabs, a message says 'Message log data table displays last 30 days of automated reminder messages'. Below this is a table with the following columns: 'Recipient', 'Method', 'Reminder Type', 'Send Time', and 'Content'. The table contains one row of data: 'Alice Chen', 'Email', 'Confirmation Request', 'March 15, 2023 10:20am', and 'Content'. At the bottom right, there is a pagination indicator '1-1 of 1' and navigation arrows.

Recipient	Method	Reminder Type	Send Time	Content
Alice Chen	Email	Confirmation Request	March 15, 2023 10:20am	Content

47 Review the message and click done when finished.

The screenshot shows a web application interface for 'Appointments'. A modal dialog box titled 'Content' is open, displaying the details of an appointment reminder. The dialog contains the following text:

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.

A green circle highlights a 'CLOSE' button in the bottom right corner of the dialog box. In the background, a table with columns for Recipient, Method, Reminder Type, Send Time, and Content is visible, with a row for Alice Chen and an email method.

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.

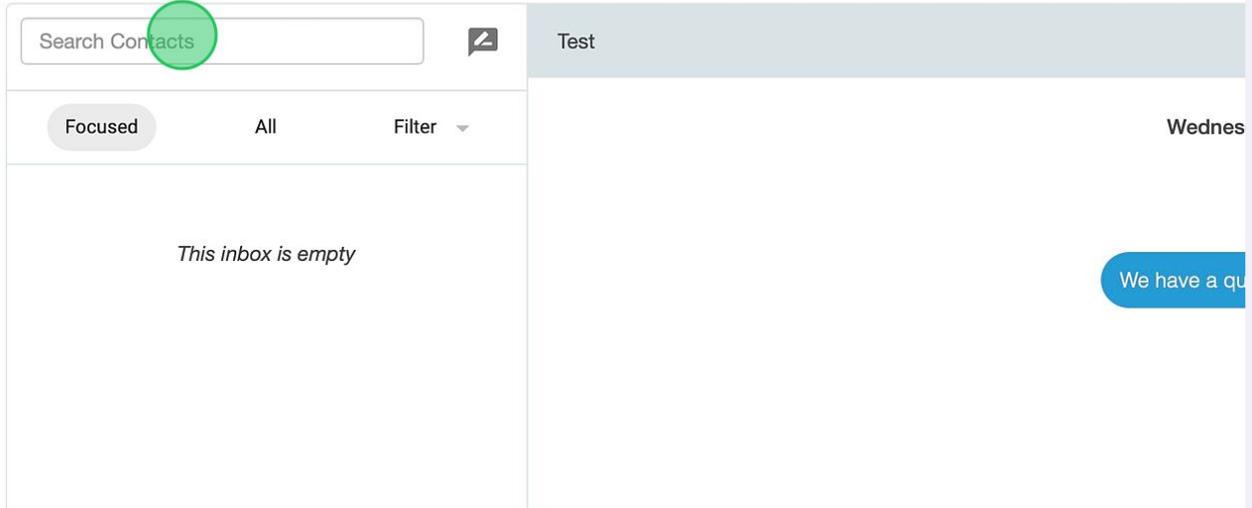
The screenshot shows a web application interface for 'Appointment Reminders'. The top navigation bar includes 'Matrix', 'Utilities', 'Reports', 'Format', 'Window', and 'Help'. Below this, a secondary navigation bar contains 'Messages', 'Schedule & Settings', 'Review', and 'Email Campaigns'. A green circle highlights the 'Messages' button. The main content area is titled 'Appointments' and includes a sub-navigation bar with 'Overview', 'Schedule', 'Patient Groups', 'Settings', and 'Message Log'. Below this, there is an 'Action Items' section with the text 'Last Data Read 3 hours ago'. At the bottom, there are three buttons: 'Unconfirmed (3)', 'Newly Confirmed (0)', and 'Reschedule Needed (0)'. The 'Unconfirmed (3)' button is highlighted with a grey background.

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 ▾



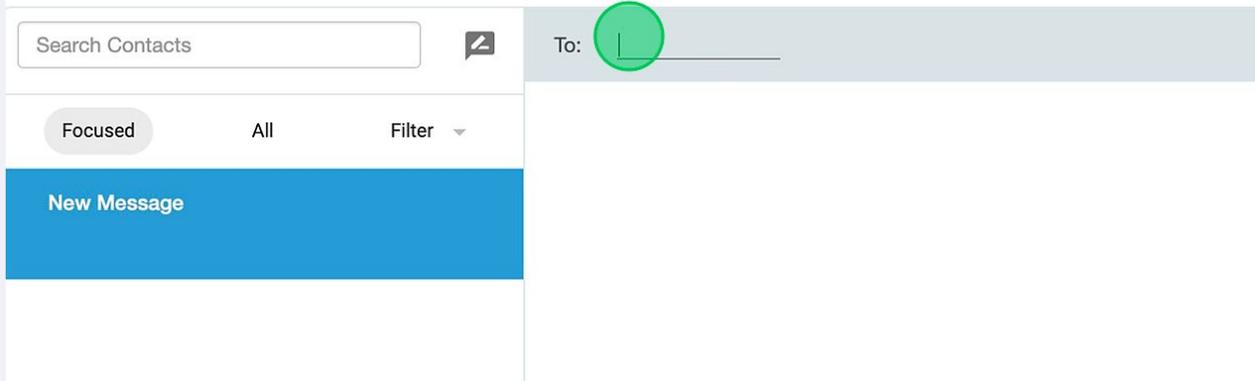
The screenshot shows the Patient Communicator interface. At the top, there are navigation tabs: Messages, Templates, Patient Groups, Away Response, and Settings. Below the tabs is a search bar labeled "Search Contacts" with a green circle around it. To the right of the search bar is a "Test" button. Below the search bar are filter options: "Focused", "All", and "Filter" with a dropdown arrow. The main content area shows "This inbox is empty" and a blue button that says "We have a qu".

50

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

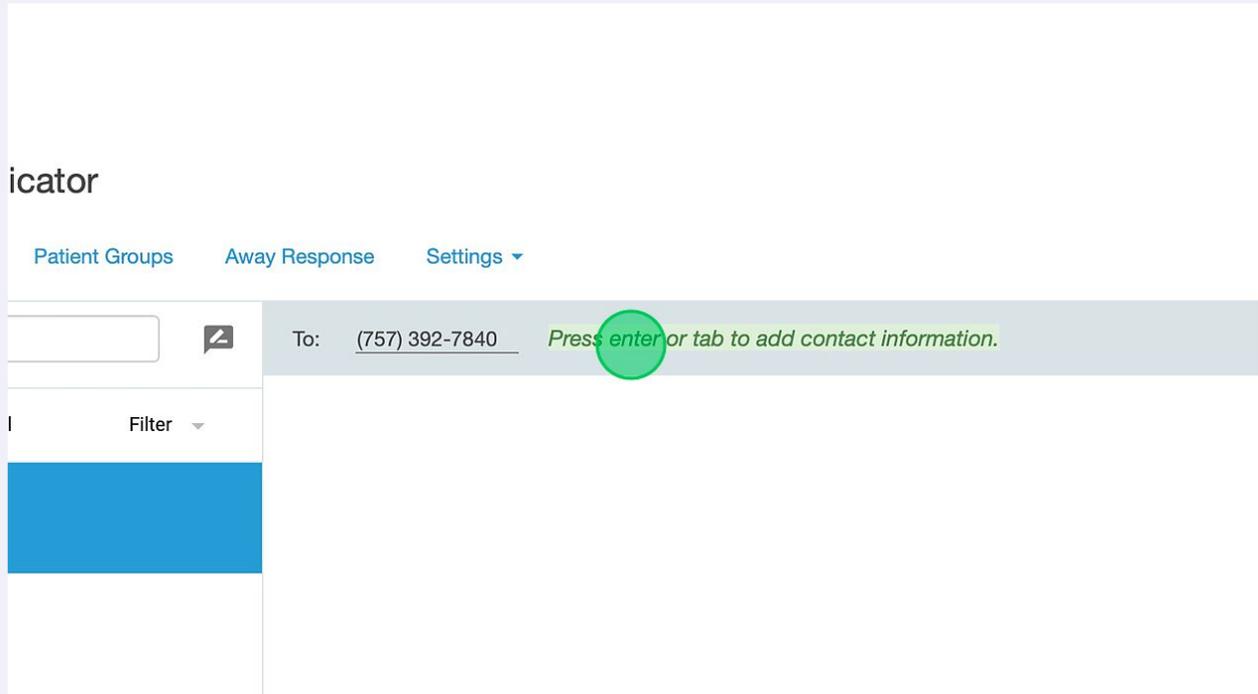
Patient Communicator

Messages Templates Patient Groups Away Response Settings ▾

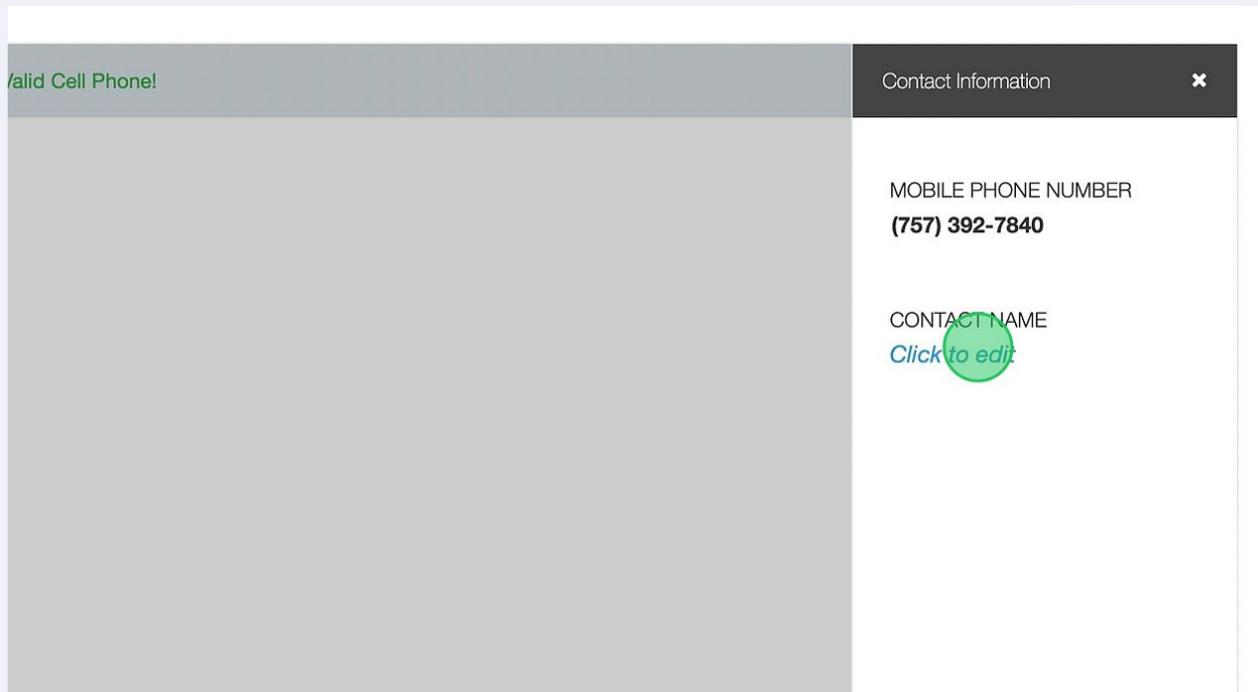


The screenshot shows the Patient Communicator interface. At the top, there are navigation tabs: Messages, Templates, Patient Groups, Away Response, and Settings. Below the tabs is a search bar labeled "Search Contacts". To the right of the search bar is a "To:" field with a green circle around it. Below the search bar are filter options: "Focused", "All", and "Filter" with a dropdown arrow. A blue button labeled "New Message" is visible at the bottom left of the interface.

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

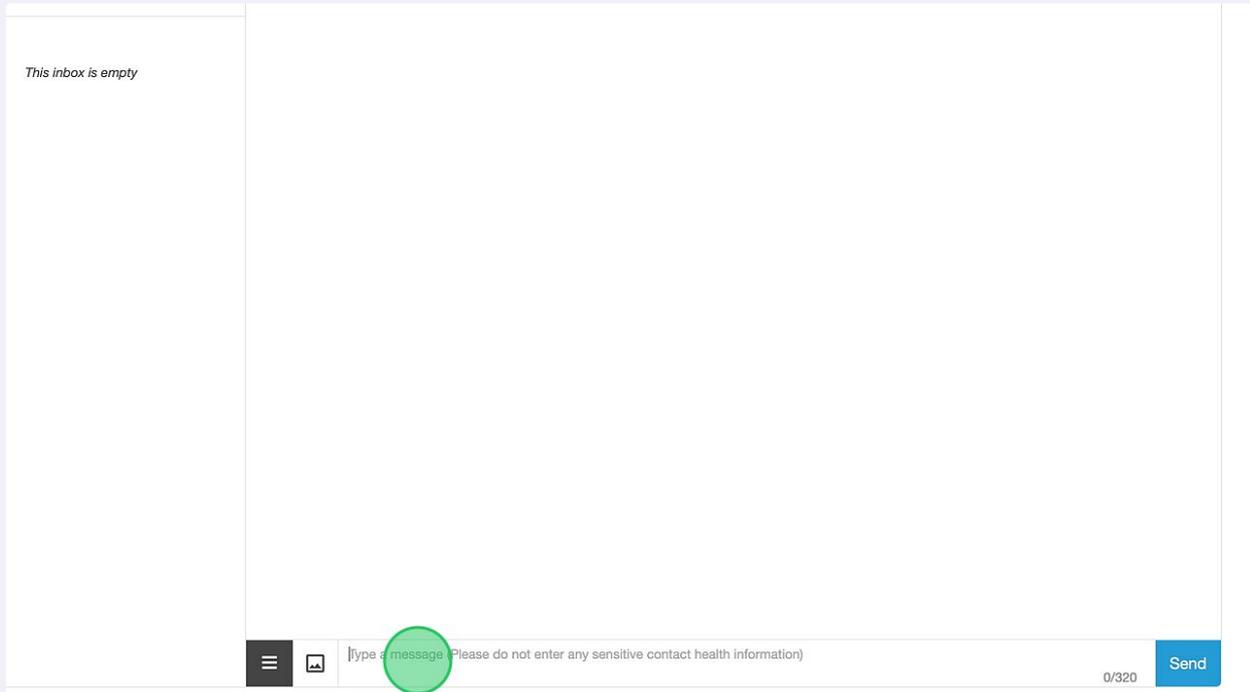


52 The contact information will open to the right. Click on 'CLICK TO EDIT' to add the contact name. Click 'SAVE' when done editing.



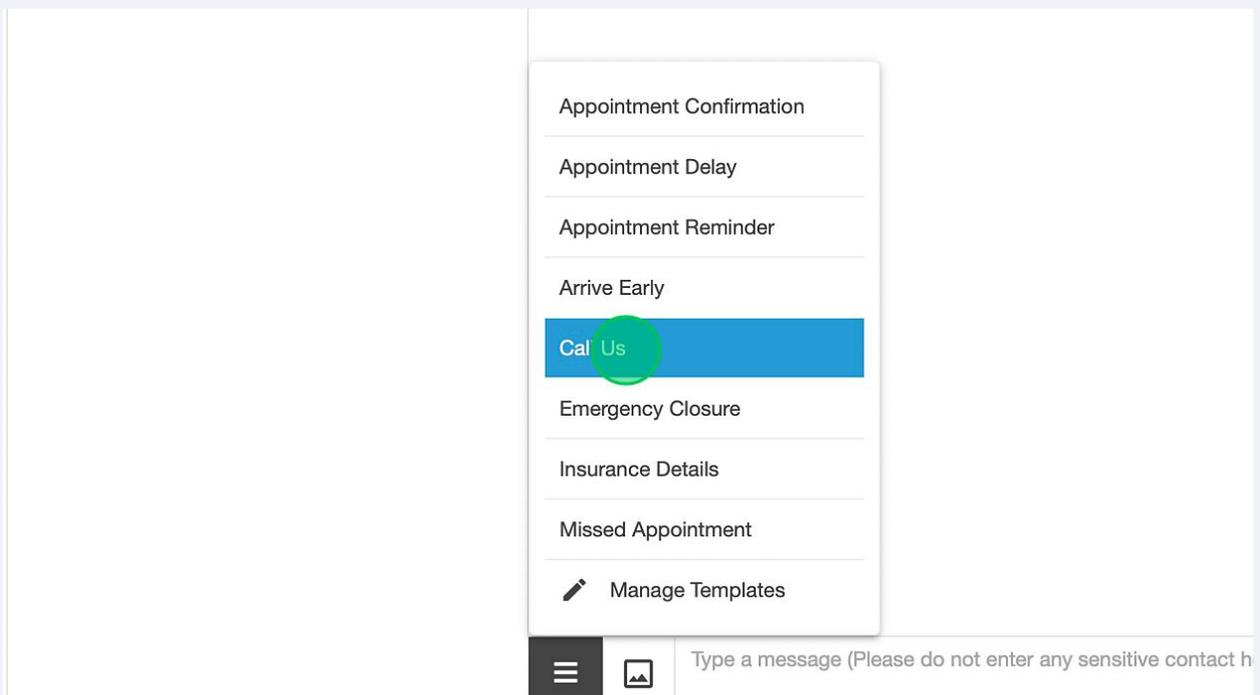
53

Click the message-text area to compose your message. Click 'SEND' when done composing.

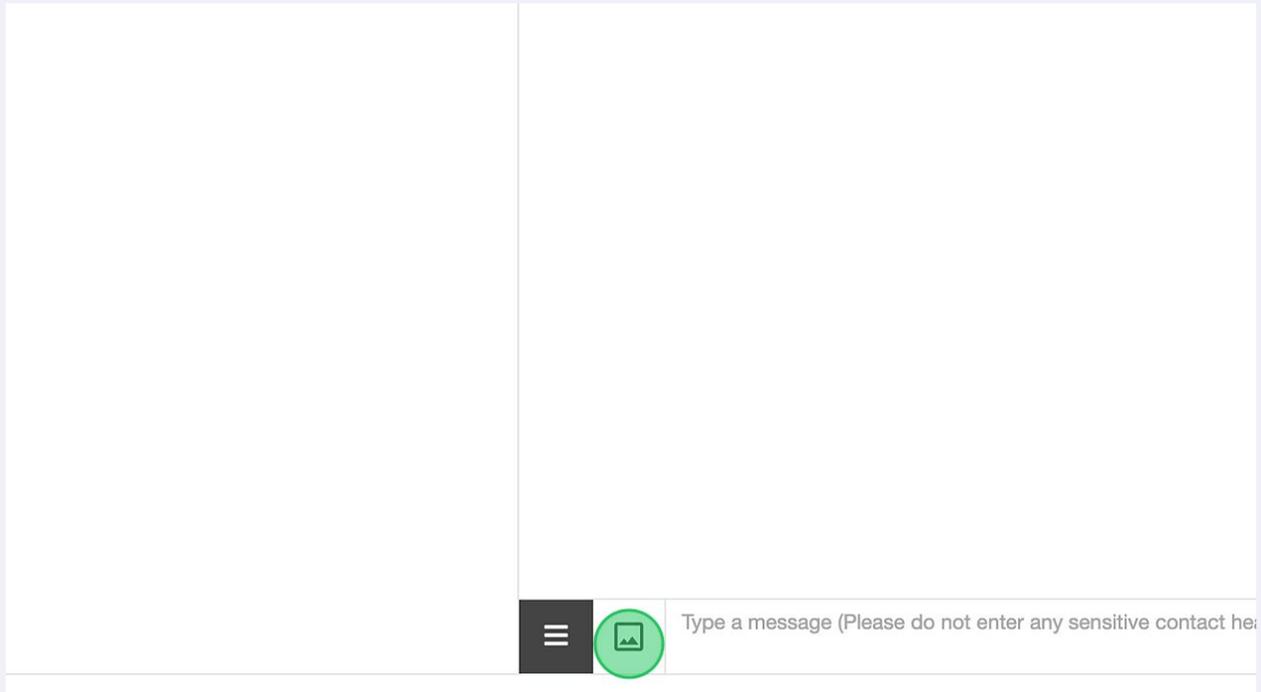


54

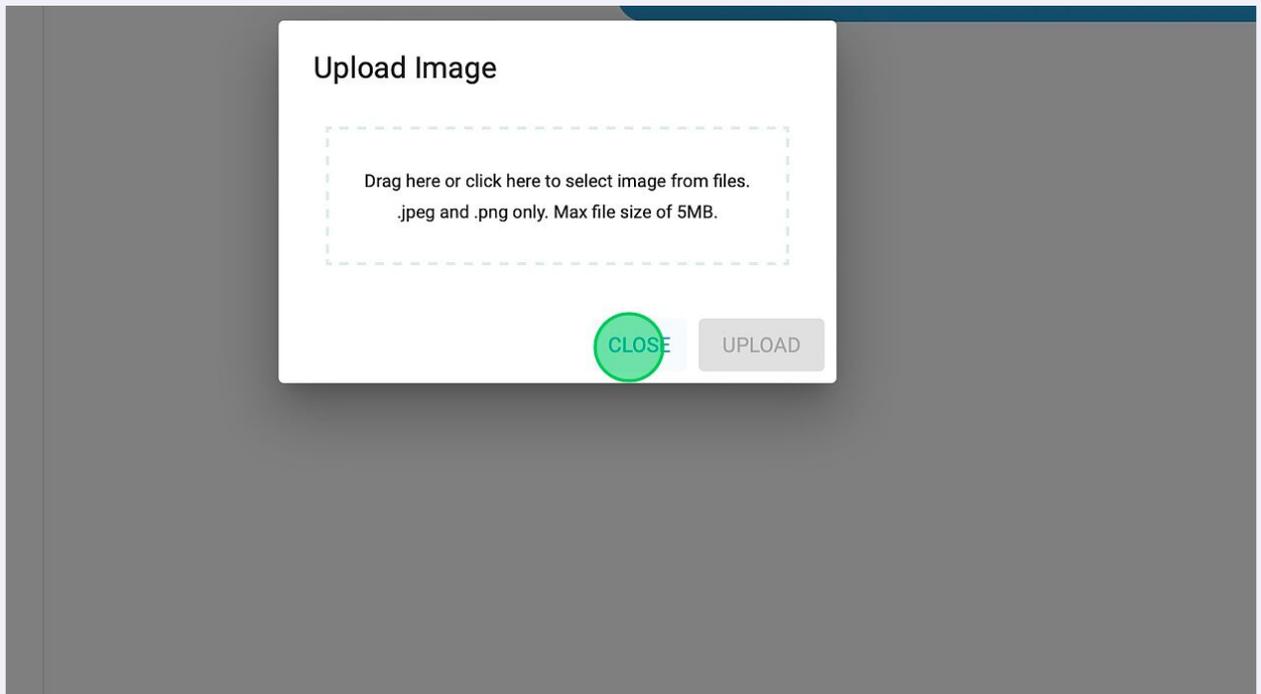
Click on the triple bar menu to send a message template. Select the template from the menu.



55 Click the images icon to send images.



56 When the window opens you can drag and drop the image file you would like to send.

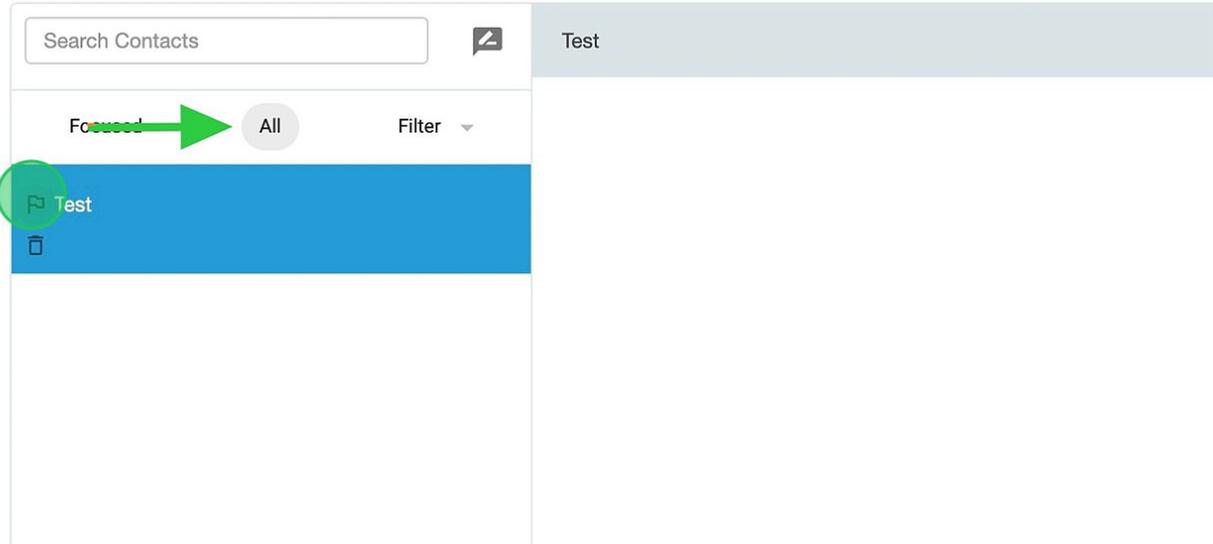


57

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

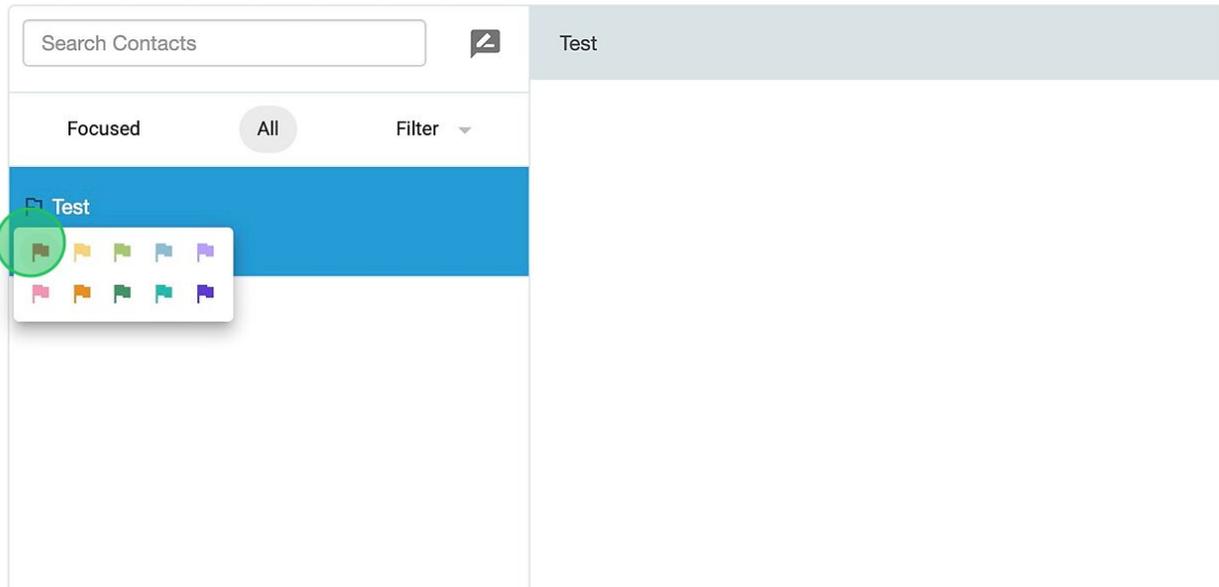
Messages Templates Patient Groups Away Response Settings ▾



58

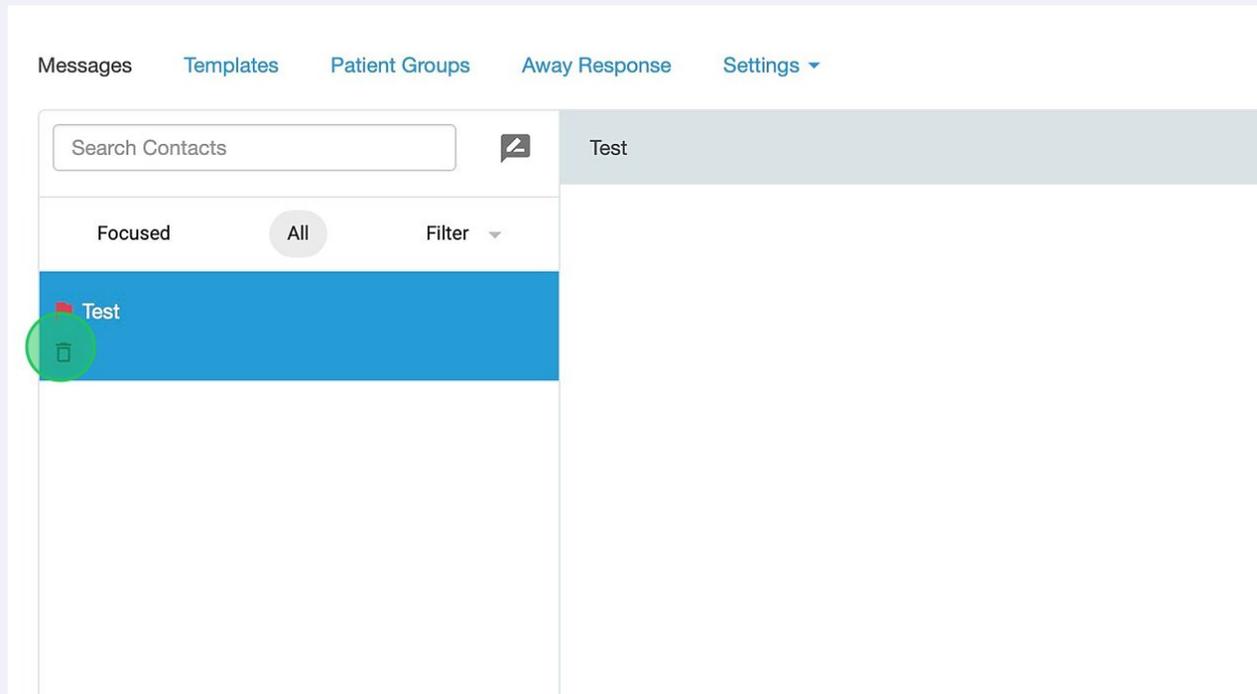
Messages can be flagged by clicking on the flag icon.

Messages Templates Patient Groups Away Response Settings ▾



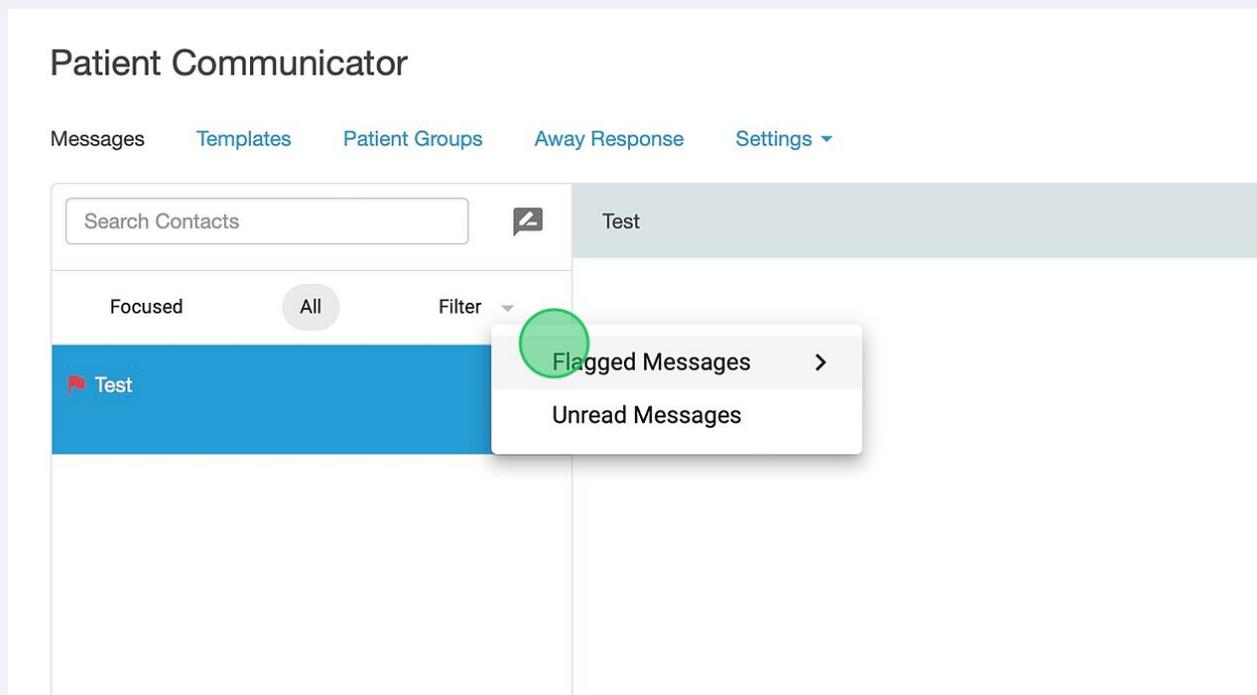
59

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 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](#) ▾

The screenshot shows the Patient Communicator interface. At the top, there are navigation tabs: Messages, Templates, Patient Groups, Away Response, and Settings. Below the navigation is a search bar labeled 'Search Contacts' and a 'To:' field. The main content area is divided into two sections: a left sidebar and a right main area. The left sidebar has a 'Focused' filter selected (highlighted with a green circle), along with 'All' and 'Filter' options. Below the filter is a blue bar labeled 'New Message' and a message card with a red flag icon and the text 'Test'. The right main area is currently empty.

62

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

Patient Communicator

Messages [Templates](#) [Patient Groups](#) [Away Response](#) [Settings](#) ▾

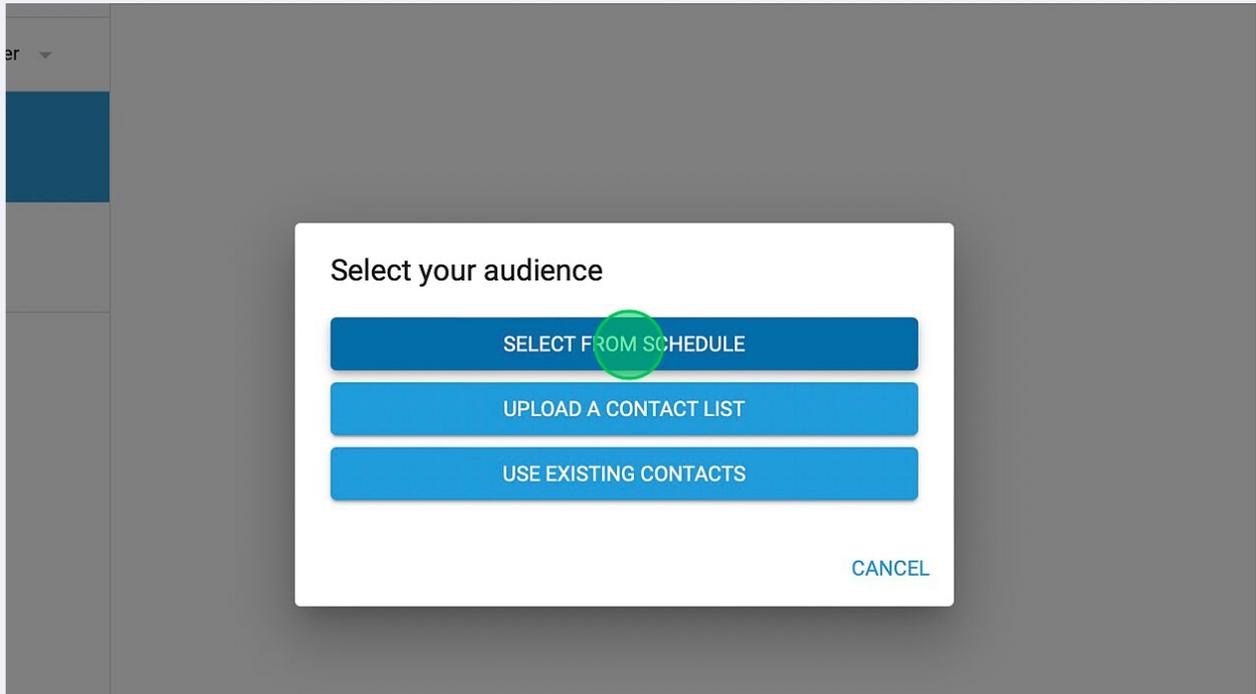
The screenshot shows the Patient Communicator interface with the 'Templates' tab selected (highlighted with a green circle). The navigation tabs are Messages, Templates, Patient Groups, Away Response, and Settings. Below the navigation is a search bar labeled 'Search Contacts' and a 'To:' field. The main content area is divided into two sections: a left sidebar and a right main area. The left sidebar has 'Focused' and 'All' filter options, with 'All' selected. Below the filter is a blue bar labeled 'New Message' and a message card with a red flag icon and the text 'Test'. The right main area is currently empty.

63

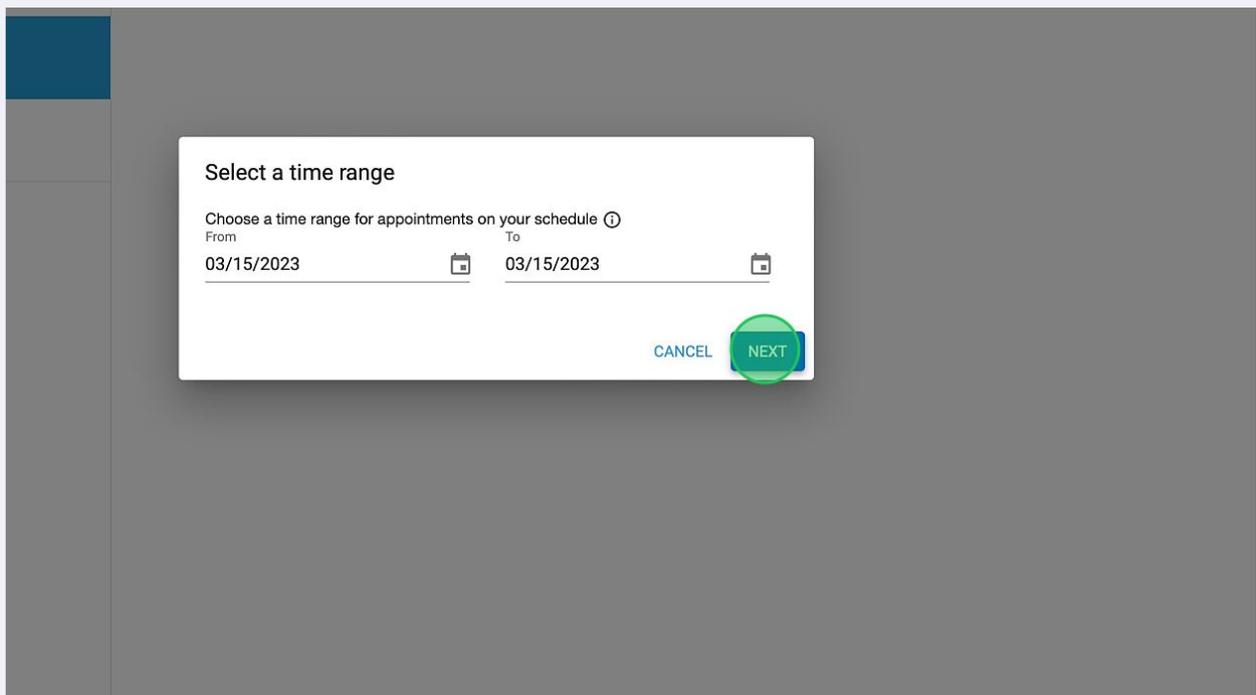
Click on "Broadcast" to mass text to a segment of patients that are, or were, on your calendar. This includes patients that are on your calendar for up to 30 days in the future, and patients that were on your calendar in the past (how far in the past will depend on when service was activated).



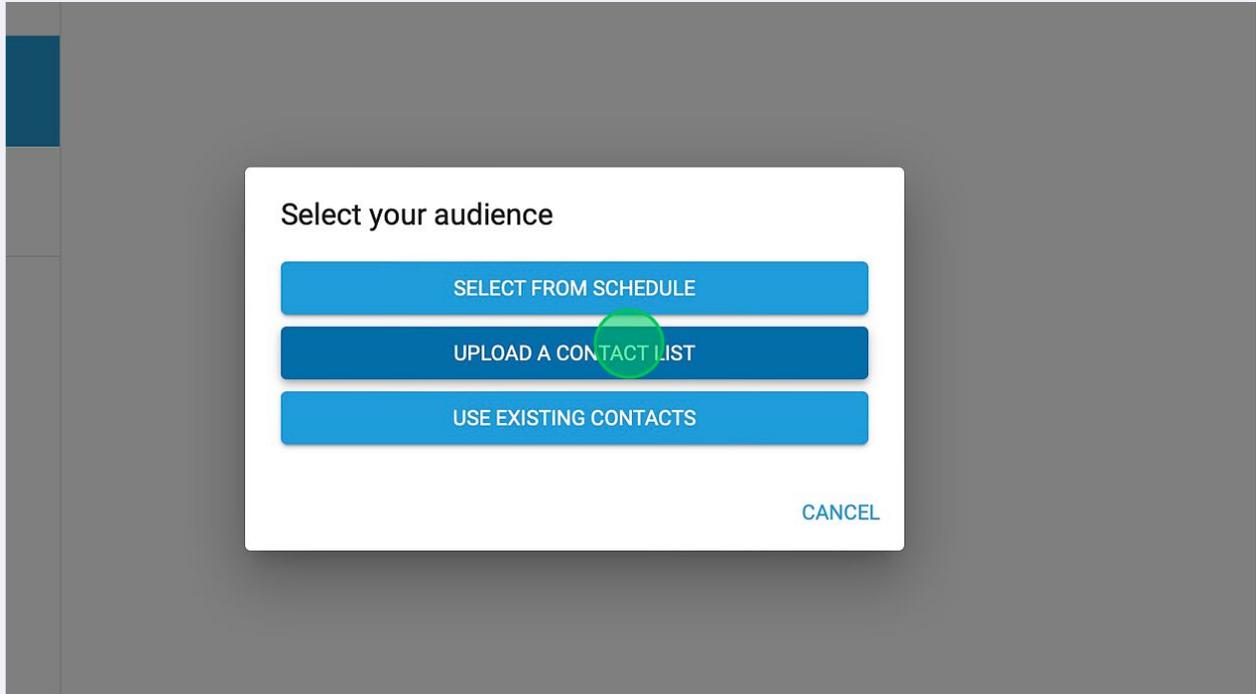
64 Click 'SELECT FROM SCHEDULE'



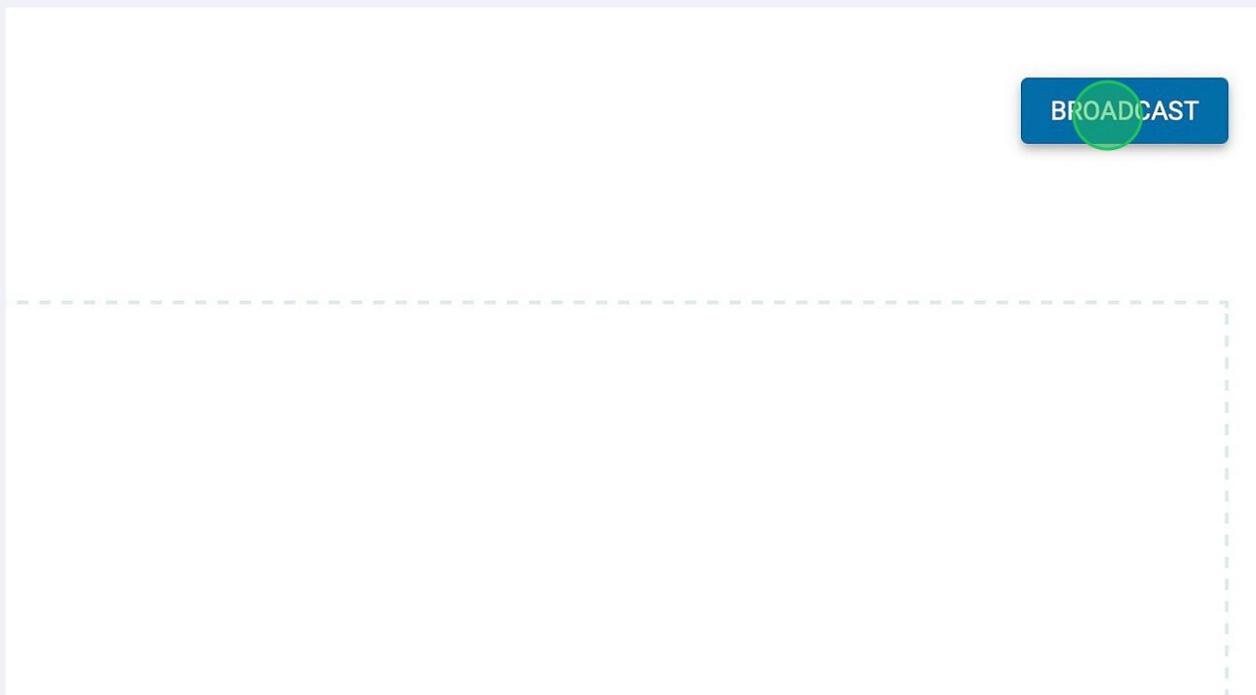
65 You can select the date range of appointments that you would like to include in the Mass Text. All patients that are not marked as Cancelled or No Show will be included in text message. If needed you will be able to select patients by 'patient group' here.



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.

The screenshot shows a web interface for composing a message. At the top, there are navigation tabs: Messages, Templates, Patient Groups, Away Response, and Settings. Below these is a search bar for contacts and a 'To:' field. The main area is a form titled 'Broadcast Message to 1 patient'. It includes a 'Template' dropdown menu with 'No Template' selected, a 'Variables' section with buttons for 'First Name', 'Last Name', 'Location Phone Number', and 'Location Name', and a 'Content' text area. A character count '0/320' is shown at the bottom right of the content area. 'BACK' and 'NEXT' buttons are at the bottom right of the form. A green circle highlights the 'No Template' dropdown.

69

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

The screenshot shows the 'Patient Communicator' interface. At the top, there are navigation tabs: Messages, Templates, Patient Groups, Away Response, and Settings. The 'Away Response' tab is highlighted with a green circle. Below the tabs is a search bar for contacts and a 'To:' field. The main area is a form titled 'Patient Communicator'. It includes a 'Focused' and 'All' filter, a 'Filter' dropdown, a 'New Message' button, and a 'Test' button. The 'Away Response' tab is highlighted with a green circle.

70

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

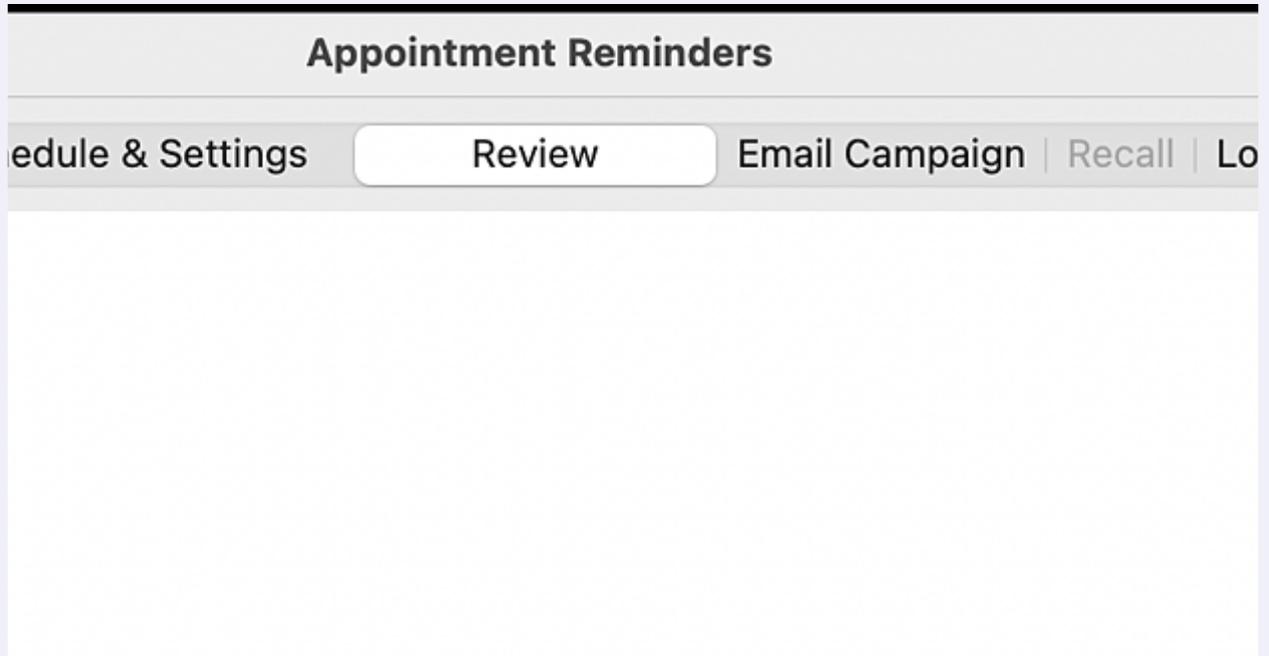
The screenshot shows the 'Patient Communicator' interface. At the top, there are navigation tabs: 'Messages', 'Templates', 'Patient Groups', 'Away Response', and 'Settings'. Below the tabs is an orange banner with a warning icon and the text 'Hours not set: [Edit office hours here](#)'. The 'Edit office hours here' link is circled in green. Below the banner is the 'Away Response Settings' section, which includes three buttons: 'OFF', 'AUTO', and 'ALWAYS-ON'. The 'AUTO' button is currently selected. Below the settings is a large empty text box labeled 'Away Response'.

71

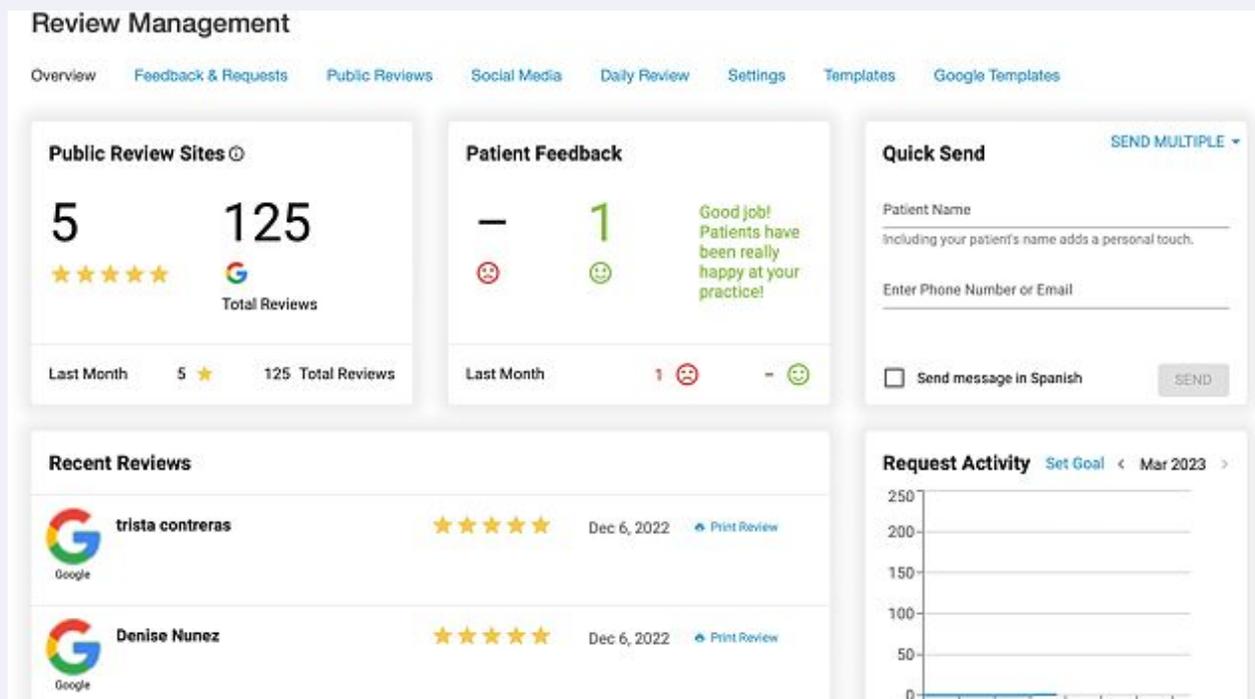
In settings you can turn notification sound on/off.

The screenshot shows the 'Patient Communicator' interface with the 'Settings' dropdown menu open. A green arrow points to the 'Settings' tab. The dropdown menu contains two options: 'Upload Contacts' and 'Notification Sound ON'. The 'Notification Sound ON' option is highlighted in green. The background shows the 'Away Response' settings page with a search bar and a list of messages.

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

Feedback & 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.

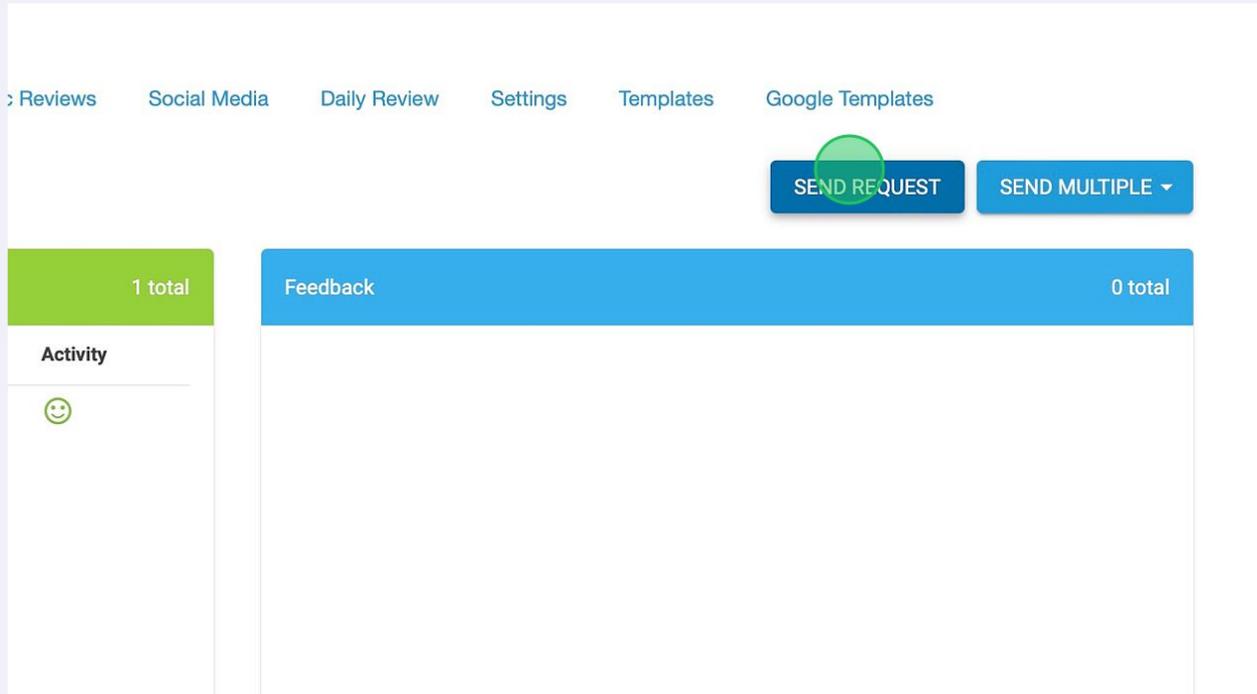
The 'i' indicates that patient clicked on a link to a review site, and if you hover the mouse over it you can see which link they clicked on.

The screenshot displays the 'Review Management' dashboard. At the top, there are navigation tabs: 'Overview', 'Feedback & Requests' (highlighted with a red box), 'Public Reviews', 'Review Sites', 'Social Media', and 'Settings'. Below the tabs is a date selector set to 'November 2019' with a red arrow pointing to it. To the right are two buttons: 'SEND REQUEST' and 'SEND MULTIPLE'. The main content is divided into two panels. The left panel, titled 'Request Activity' (92 total), contains a table with columns 'Date Sent', 'Patient', and 'Activity'. The table lists several patients: Lori, David, John, Leilt, Danie, Glenn, and Chris, all with a date of 11/14/19. Red arrows point to the 'Activity' column header and a small red icon in the 'Activity' column for Danie. The right panel, titled 'Feedback' (2 total), shows two feedback entries. The first is from Lori on Nov 18, stating 'I will not rate on social media'. The second is from Brit on Nov 6, providing a detailed comment about petroleum jelly and gloves. A red arrow points to an information icon (i) in the 'Activity' column of the table.

Date Sent	Patient	Activity
11/14/19	Lori	
11/14/19	David	
11/14/19	John	
11/14/19	Leilt	
11/14/19	Danie	i
11/14/19	Glenn	
11/14/19	Chris	

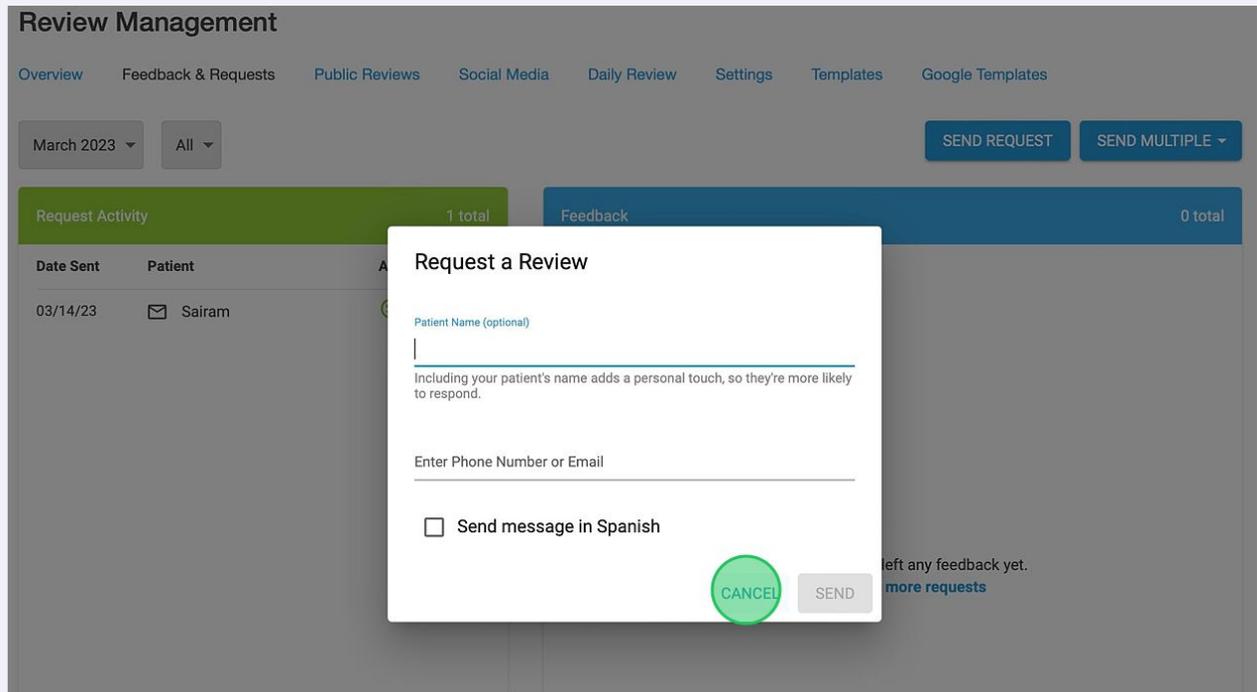
75

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



76

Complete the Request a Review window and click Send.



77

Click 'SEND MULTIPLE'

The screenshot shows the top navigation bar of a software interface for 'Tops Orthodontics Practice'. The practice name is displayed in a dropdown menu. Below the navigation bar, there are several tabs: 'Reviews', 'Social Media', 'Daily Review', 'Settings', 'Templates', and 'Google Templates'. Two buttons are visible: 'SEND REQUEST' and 'SEND MULTIPLE'. The 'SEND MULTIPLE' button is highlighted with a green circle. Below the buttons, there are two panels: 'Activity' with a '1 total' count and a smiley face icon, and 'Feedback' with a '0 total' count.

78

You can send multiple request up to 25 patients.

The screenshot shows a 'Send Multiple Review Requests' dialog box overlaid on a software interface. The dialog box has a title 'Send Multiple Review Requests' and contains five rows of input fields. Each row has a 'Patient Name (optional)' field and an 'Enter Phone Number or Email' field, with a close button (X) to the right of each row. Below the rows is an 'ADD ROW' button. At the bottom of the dialog box, there is a checkbox labeled 'Send all in Spanish', a 'CANCEL' button, and a 'NEXT' button. The background interface shows a 'Request Activity' table with columns 'Date Sent' and 'Patient', and a 'Feedback' panel with a '0 total' count. The 'SEND MULTIPLE' button from the previous screenshot is also visible in the background.

79 Click 'PUBLIC REVIEWS'

Review Management

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

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

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

Filter [Clear All](#)

Date Range
All Time

Source
Google (125)

Rating
5 Stars (125)
4 Stars
3 Stars
2 Stars

 Marcella Mirafuentes ★★★★★ Dec 6, 2022 Print Review
 Denise Nunez ★★★★★ Dec 6, 2022 Print Review
 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

 [Connect with Facebook](#)

 [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.

Automate 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 positive review:

Auto publishes all your reviews to your Facebook page (requires that you connect your Facebook page from the [Social Media](#) settings):

Shows your location logo on the review request:

Shows your location name on the review request:

Disables review request reminders. Reminders are used when the patient has not interacted with the request:

The time in days since last review request that a patient can receive another request: 60

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.

The screenshot shows the 'Review Management' interface. At the top, there are navigation tabs: Overview, Feedback & Requests, Public Reviews, Social Media, Daily Review, Settings, Templates, and Google Templates. Below this is the 'Review Request Templates' section. On the left, a sidebar shows a list of templates: 'Review Request 1 day after appointment' (with a gear icon), 'Text', and 'Email'. The main area is titled 'Editing Review Request Schedule'. It includes a 'Friendly Name' field, a 'Contact Method' section with checkboxes for 'Text' and 'Email', and a 'Filters' section with a 'Rule' dropdown set to 'Only send' and a 'Patient Group' dropdown set to 'All patients'. There are 'SAVE' and 'HISTORY' buttons at the bottom.

85

Click Text or Email to edit the message.

The screenshot shows the 'Review Request Templates' interface. At the top, there are navigation tabs: Overview, Feedback & Requests, Public Reviews, Social Media, Daily Review, Settings, and Templates. Below this is the 'Review Request Templates' section. On the left, a sidebar shows a list of templates: 'Review Request 1 day after appointment' (with a gear icon), 'Text', and 'Email' (with a green circle). The main area is titled 'Editing Schedule Template'. It includes language selection tabs for 'ENGLISH', 'SPANISH', and 'FRENCH'. Below this is a 'Variables' section with a help icon and buttons for 'First Name', 'Last Name', 'Location Name', and 'Request Link'. A text area contains the message: 'Hi First Name, thanks for visiting Tops Orthodontics Practice ! Can you give feedback about your visit by clicking this link: Request Link STOPtoOptOut'. There is a '151/464' character count indicator. At the bottom, there are 'SAVE' and 'BACK' buttons.

86

Click on Google Templates to customize your Google response template.

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

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)

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 ▼

Settings Patient Groups

s

s

vn

New Patient Welcome Newsletter I Newsletter II

AME

WELCOME

Hi Jimmy!

This month of General Practice

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).

Campaigns

▶ Templates My Campaigns Settings Patient Groups

Default Templates

- Create Your Own**
COMPANY NAME
YOUR SLOGAN HERE
Hi Jack!
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.
Sincerely,
General Practice
SELECT PREVIEW
- New Patient Welcome**
Hi Jimmy!
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 appointment, so that we can ensure any necessary paperwork is complete. Please have a copy of your insurance and photo ID ready as we will need copies.
SELECT PREVIEW
- Newsletter I**
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.
Sincerely,
General Practice
SELECT PREVIEW
- Newsletter II**
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.
Sincerely,
General Practice
SELECT PREVIEW

Custom Templates NEW TEMPLATE

89

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

Campaigns

▶ Templates My Campaigns Settings Patient Groups

Create Campaign SAVE AS TEMPLATE TEST SCHEDULE SEND

Campaign Details

To
Who are you sending this campaign to?

From
Tops OTesting
Who is sending this campaign?

Variables ?
First Name Last Name Location Name

Subject
Welcome to the Tops OTesting family!

Hi First Name!

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.

Sincerely,
Tops OTesting

230 W 3rd Ave , Escondido, CA 92025 +17604890330
Unsubscribe | Powered by Tops

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.

Create Campaign

TEST SCHEDULE SEND

Campaign Details

All Active Patients (4)
All Patients (4)
Upload Contacts
Select Patients from Schedule
Individual Patients

Content

Variables: Location Name Location Phone Number Patient Name

Title
Dear Patient Name,

Variables: Location Name Location Phone Number Patient Name

Body
Your health and well being is our number one priority!
In accordance with the CDC guidelines, we respectfully ask you to stay home if you experience any symptoms suggestive of COVID-19, including coughing, sneezing, or fever, or have been exposed to someone who was tested positive for COVID-19. Feel free to contact our office to reschedule your

Preview

DOWNTOWN DENTAL

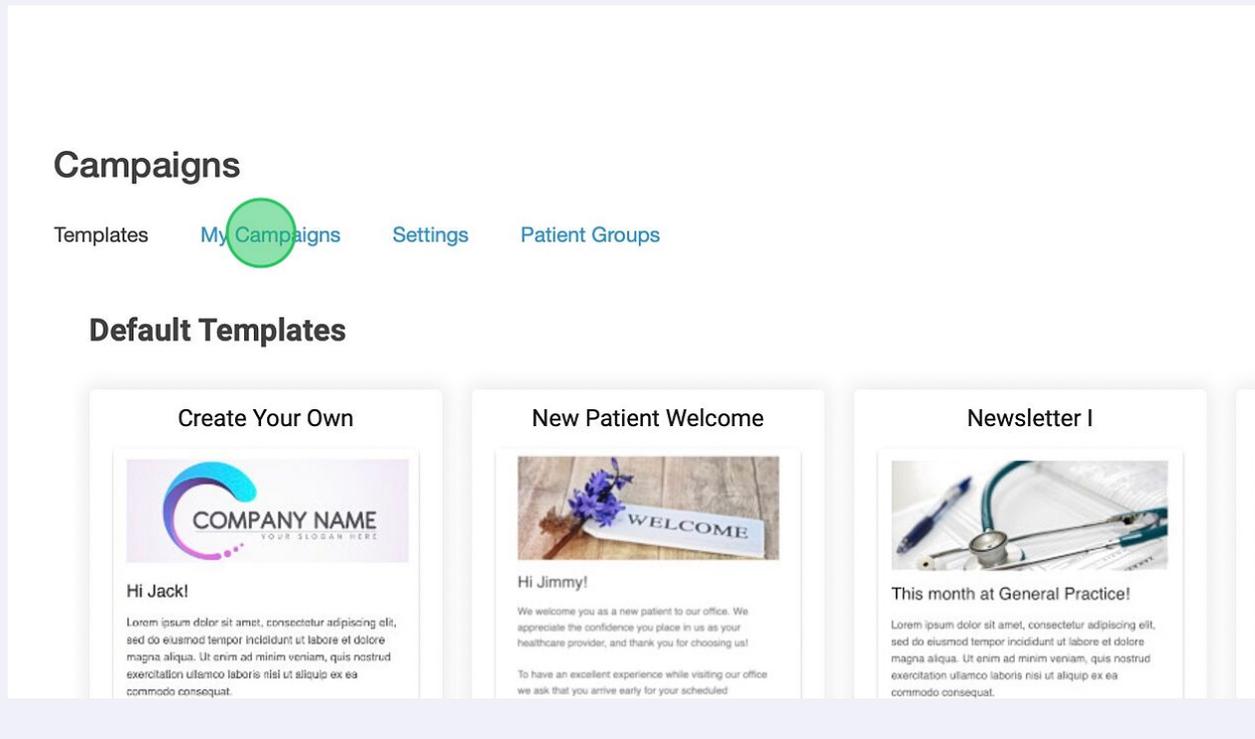
Dear Patient Name,

Your health and well being is our number one priority!

In accordance with the CDC guidelines, we respectfully ask you to stay home if you experience any symptoms suggestive of COVID-19, including coughing, sneezing, or fever, or have been exposed to someone who was tested positive for COVID-19. Feel free to contact our office to reschedule your appointment.

We are actively monitoring the COVID-19 situation and will continue to follow the precautionary guidelines provided by CDC and local Public Health Services. We are also staying on top of our sanitary protocols and

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



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

The screenshot shows a table titled 'Campaigns' with the following columns: 'Date ↑', 'Subject', 'Patient Reach', and 'Actions'. The table contains four rows of campaign data:

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.](#)