Manage

What's New

Version 7.2.1

Auditdata

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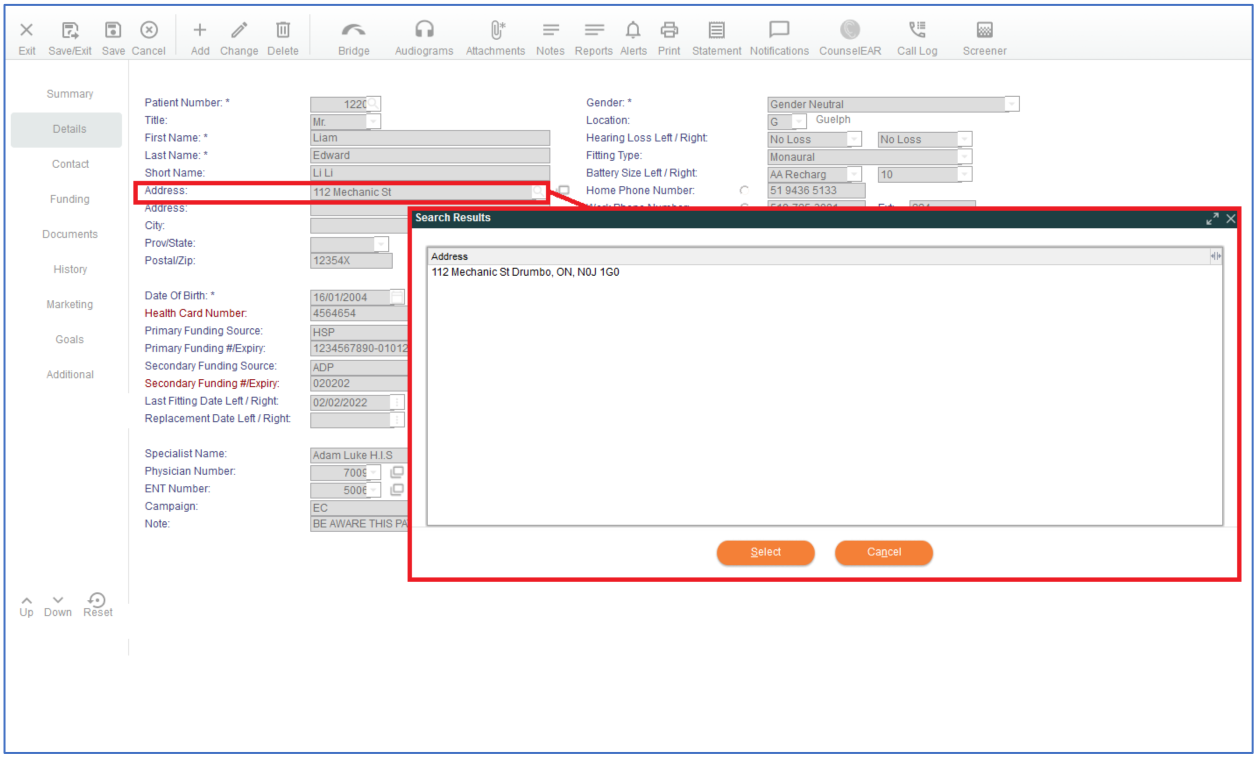
1 Introduction

The purpose of this document is to give an overview of all the new and modified features within Manage release version 7.2.1.

2 Kleber Address Validation Tool Now Available for the UK

Our Kleber Address Validation Tool integration is now available for our UK clinics, joining our Australian, New Zealand and Canadian clinics that already use the tool.

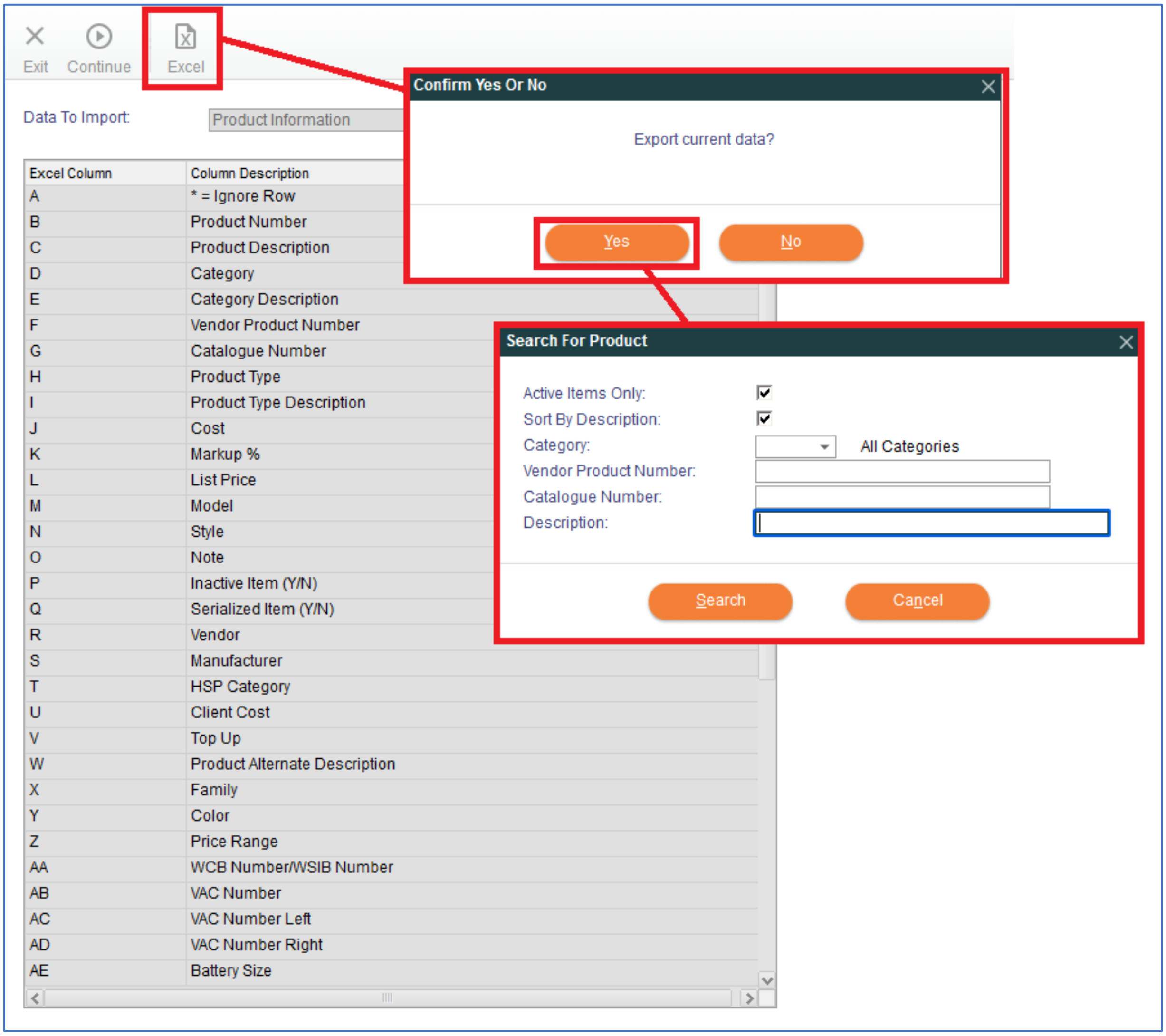
The Kleber Address Validation Tool is a subscription-based third-party integration that allows clinics to ensure that patient addresses entering the database are correct, consistent, and valid postal addresses.



When a user is finished entering part of an address, they will be presented with a list of perfectly formatted postal addresses that the user can select from.

3 New Data Import Enhancement

Within UTILITIES > IMPORT DATA the PRODUCT INFORMATION, COST LEVELS, PRICE LISTS and PRODUCT MIN/MAX QUANTITIES have been enhanced to allow users the option to export current data.

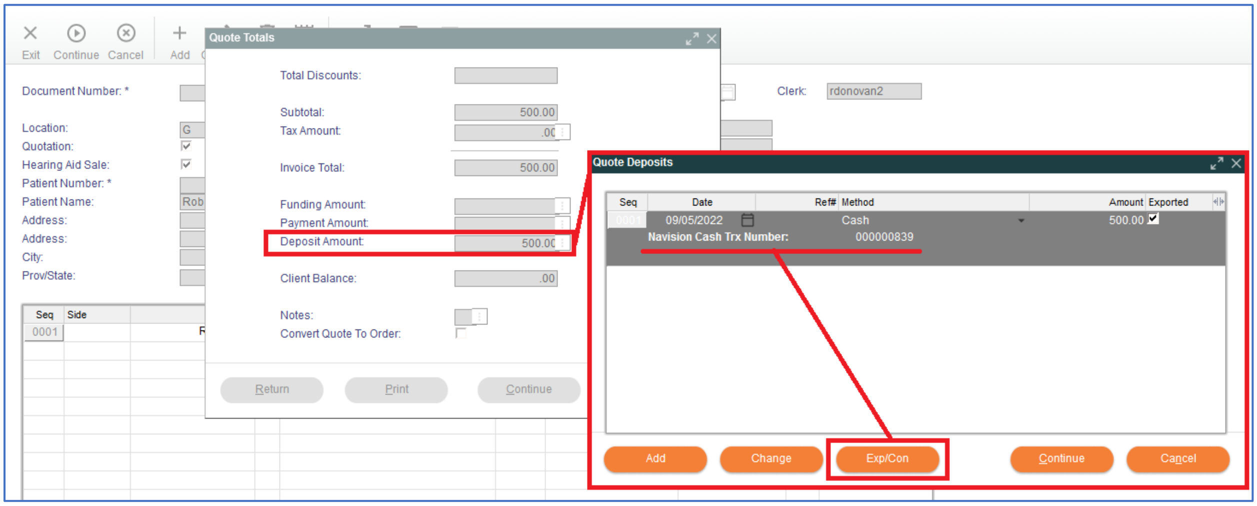


Users who choose to export data may be presented with other filter selection options regarding the data they wish to export.

It is important to note that users who have permission to the IMPORT DATA function will now also have permissions to export data.

4 Quote "View Only" Screen Enhancement

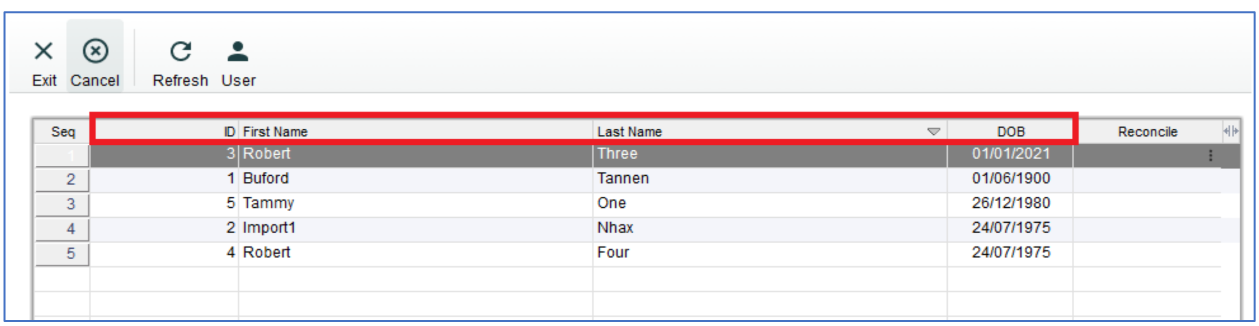
In the spirit of aligning viewable invoice and accounting details within Invoices and Quotes, the QUOTE DEPOSITS view-only screen has been enhanced to show accounting transaction batch details.



Clicking the EXP/CON button within the QUOTE DEPOSITS window will now display the Daily Close Cash Transaction number associated with each deposit.

5 New Sortable Screen within MANUAL NHAX RECONCILIATION

The MANUAL NHAX RECONCILIATION screen has been enhanced to allow the data presented to be sortable by the column headers. This is very helpful for those clinics importing a high volume of patient NHAX data into Manage.



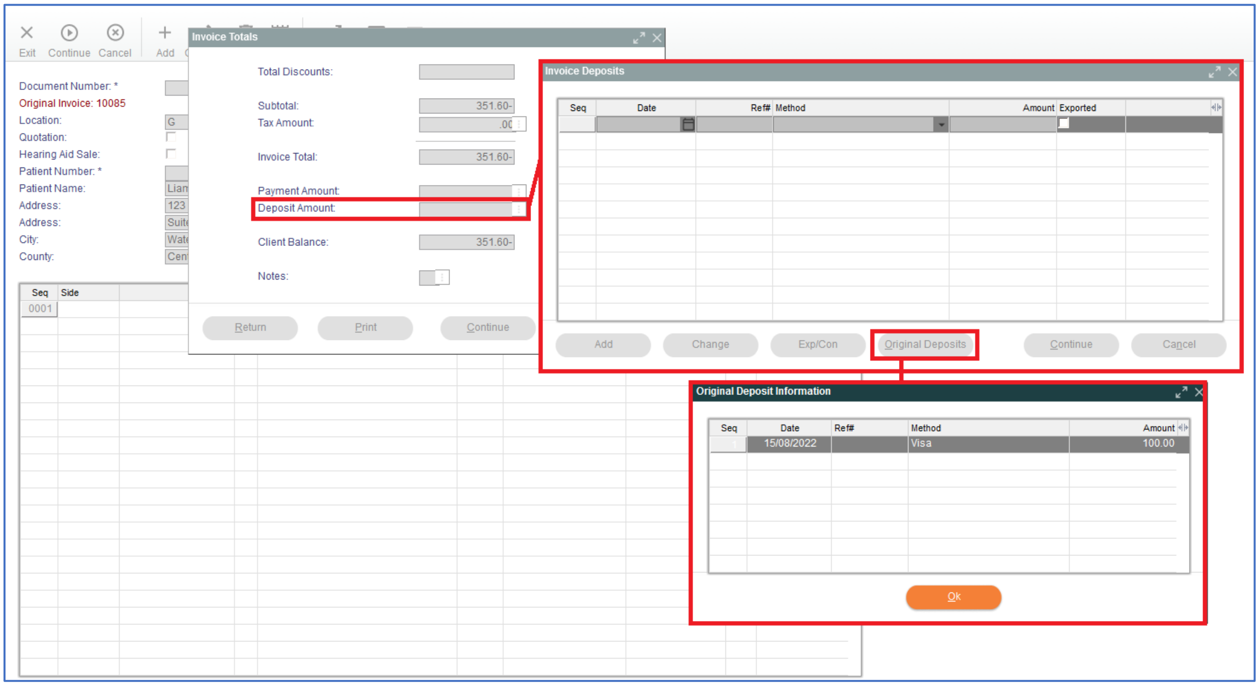
6 Australian HSP Forms Updated

As per the July 2022 Australian HSP changes, the Maintenance Agreement and Device Quote form templates have been updated accordingly.

7 Previous Customer Deposits Now Viewable During Credit Invoice / Refund Process

When returning an invoice, users can now view the original invoice deposits as part of the viewable information.

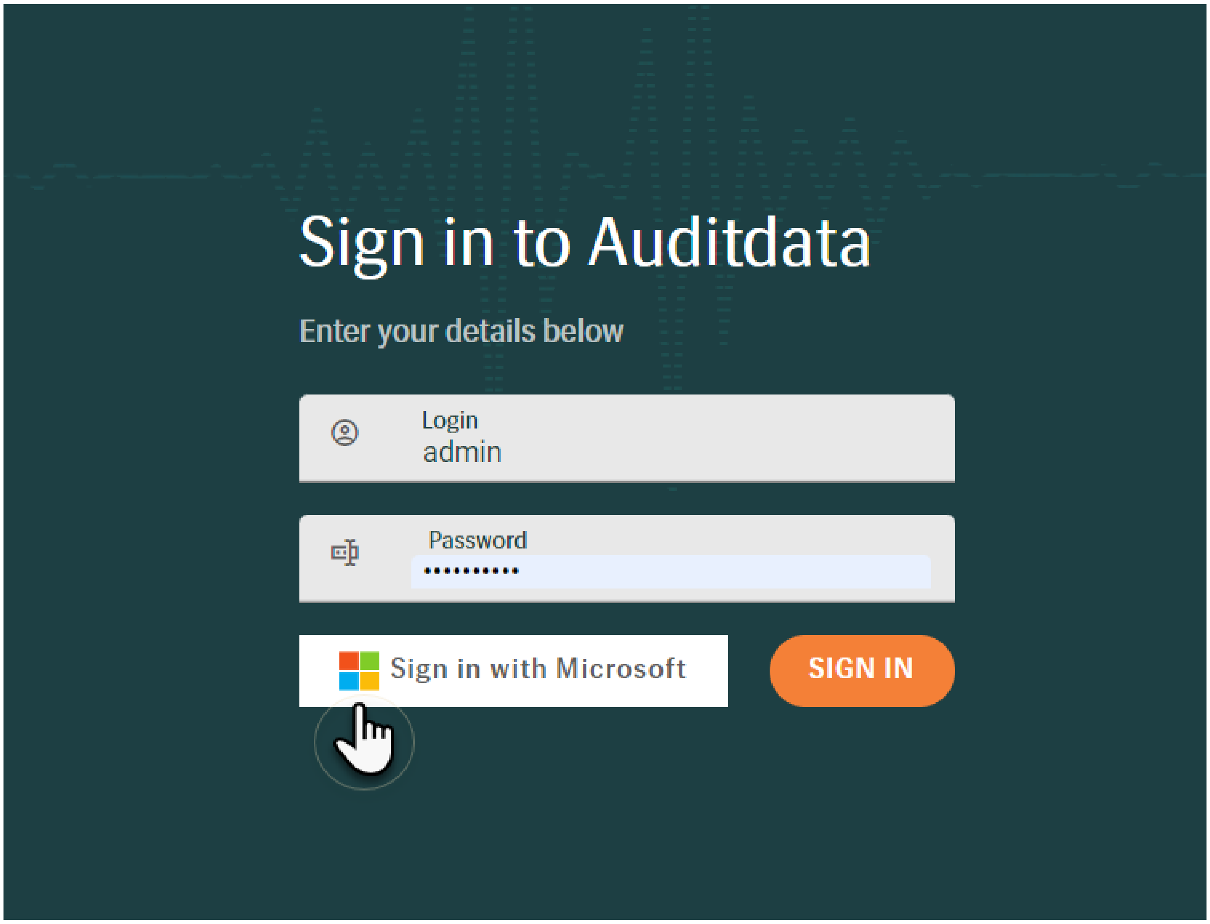
This is helpful in assisting the user determine how to refund the payments due in the case when the refund must match the payment type originally used.



Users can click on the ellipses to the right of the DEPOSIT AMOUNT on the CREDIT INVOICE and navigate to ORIGINAL PAYMENTS to see a list of deposits made and the details of those deposits.

8 Single sign-on (SSO) for Manage 7 users

As of this release, users can log into Manage 7 with their official Microsoft accounts. For security purposes, multi-factor authentication has been implemented.



9 Creating appointments with pre-selected data

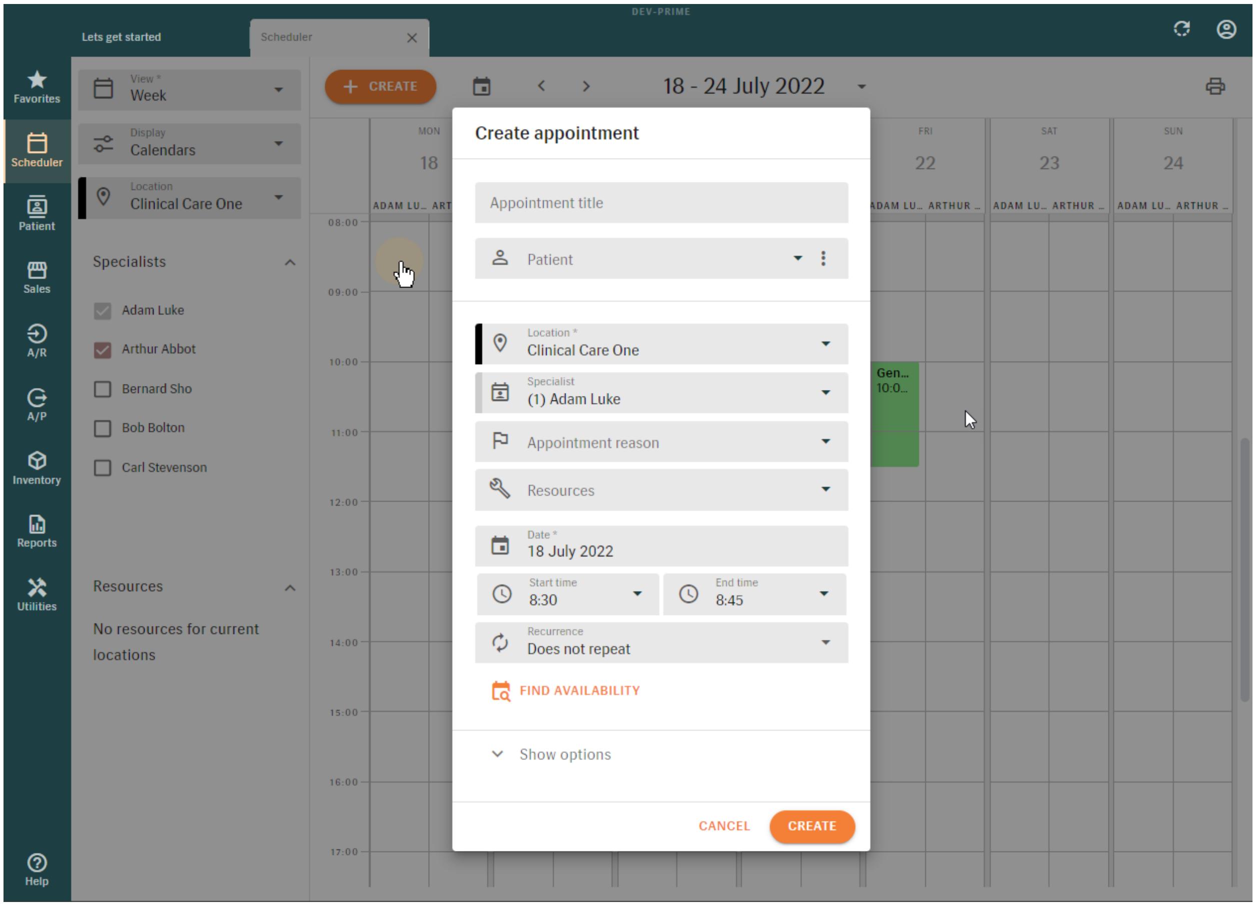
Appointments can be booked faster with the new pre-selection feature. Depending on view and display settings as well as selected filters, different input fields are auto-completed correspondingly in the CREATE APPOINTMENT pop-up.

When creating appointments via Scheduler:

- Date and time are always filled in automatically. The date can either be the current date or the date selected in the calendar.

- If the location, specialist, or resource is selected, this location/specialist/resource will be populated to the respective field in the CREATE APPOINTMENT form.

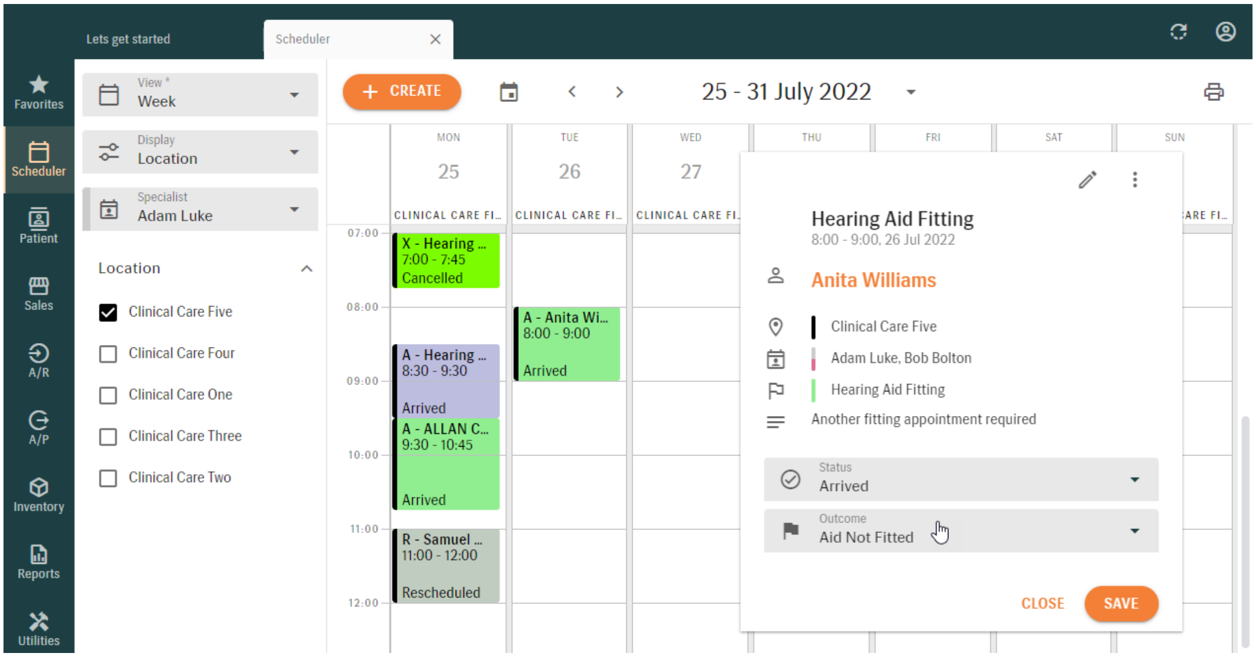
- In grid view, preselect data will be additionally refined with values contained in the grid a user clicks into.



10 Better appointment data overview

It is now possible to get a fast overview of the appointment data without the need to open the appointment edit window and without the need to search for required information within that window.

Clicking into the appointment, users will be able to see the appointment overview with the notes and the outcome of the appointment.



In CALENDAR VIEW, appointment status is now displayed either in the time slot or on hover for appointments shorter than 45 minutes.

In SCHEDULE VIEW, the following appointment details have been made available for viewing:

- Appointment reason
- Phone number
- Specialist
- Outcome
- Status
- Location