



Horizon Integrator CRM

Patient Connect Add-in Guide



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Introduction

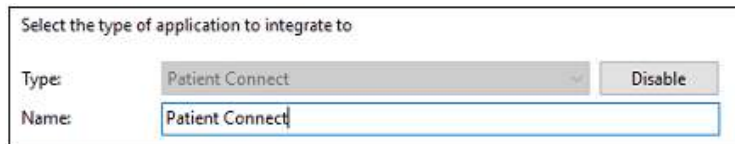
This page will guide you through configuration and basic use of the Horizon Integrator Patient Connect Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the 'User Guide' for these topics.

Patient Connect and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

Horizon Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

Configuration

Right-click the Horizon Integrator tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'Patient Connect' from the 'Type' dropdown box and then click the 'Set' button.



Select the type of application to integrate to

Type: Patient Connect

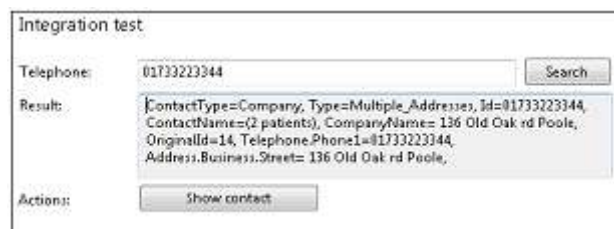
Name: Patient Connect

Click the 'Save' button to apply the configuration.

Please Note: The Horizon Integrator Address Book will only provide the ability to search on phone numbers.

Testing

To test if the configuration worked, enter a phone number from your Patient Connect account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.



Integration test

Telephone: 01733223344

Result: [ContactType=Company, Type=Multiple_Addresses, Id=01733223344, ContactName=(2 patients), CompanyName= 136 Old Oak rd Poole, OriginalId=14, Telephone.Phone1=01733223344, Address.Business.Street= 136 Old Oak rd Poole,

Action:

The test area results should look similar to the results showing in the image here. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.