





557 756 5560 ° 600 666 7067 ° 1 ax 557 756 5265 ° www.solutionsbydesign.com

© Copyright 2005-2014 Solutions by Design, Inc.All Rights Reserved. ScreenPlay is a Registered Trademark of Solutions by Design, Inc.

Table of Contents



bLink PRO

Users Guide

System Requirements and Practice Management	
Integrations	1
Introduction and Overview	2
Manage your bLink Pro Settings via ANDI	4
Dashboard	4
Settings Tab	5
Practice Settings	5
PMS Settings	5
Financial Settings	5
Email Settings	6
SMS Settings	6
Services	6
Website	7
Download Tab	7
Video Tab	7
Email Tab	8
Conversion Email	9
Welcome Email	9
Appointment Reminder Emails	10
No Show Email	12
Recall Emails	13
Post Appointment Emails	14
Financial Email	15
Patient Education Emails	16
Mass Emails	16
SMS Tab	17
Appointment Reminder SMS	17
Financial SMS	18
Marketing Tab	19
Announcement	19
Birthday Email	19
Birthday SMS	20
Logs Tab	20
Email Log	20
SMS Log	21
ACH Log	22
Support Tab	22
Reports Tab	22
Doctor Portal	23
Patient Portal	25



System Requirements and Practice Management Integrations

bLink Pro System Requirements

These guidelines must be followed to ensure that bLink Pro works reliably and effectively for your practice. Other equipment not meeting these specifications may not allow bLink Pro to function properly.

Operating System

(Windows) XP, Vista, Windows 7, 8.0 and 8.1

(Mac) OS 10.5 and Safari 5 or newer

Processor

(Windows) 2 GHz Intel Core 2 Duo or above recommended for smooth video playback.

(Mac) 2 GHz Intel Core 2 Duo or above recommended for smooth video playback.

Hard Drive

Only 2 GB of space is required. However it is imperative that the machine on which bLink Sync is installed remain powered on to facilitate the daily transfer of data.

Video Card

All basic video cards including PCI, ISA, AGP and integrated motherboard cards support bLink Pro.

Internet Connection

bLink Pro is a web based program and requires a high speed internet connection. Our tech staff will test your connection speed during installation.

Hardware Requirements

Desktop computer, monitor, keyboard and mouse

Additional Hardware (Optional)

Printer

Practice Management Software Integration Partners:













INTRODUCTION AND OVERVIEW

Welcome to blink Pro! bLink Pro is a multi-faceted application that provides an efficient means of communicating with your patients and vice versa. bLink Pro includes several key features to enhance the communication process within your practice including email and text appointment reminders, on-line patient payment processing, automated distribution of educational videos as your patients progress through treatment and on-demand videos to play educational videos chair-side. bLink Pro syncs with your Practice Management Software to accumulate the data necessary to distribute information as you have defined in your setup.



bLink Sync



bLink Patient Portal

bLink Pro is a web-based application that provides doctor and patient services. It is comprised of 4 modules:

- bLink Sync
- bLink Doctor Portal
- bLink Patient Portal
- ANDI Account



bLink Doctor Portal

Dashboard	
Kut	
Active Stat Spec	
ra Grantariza	
	-
186	W 7
Responsible Parties	Addate Association
J Personal	Tranactions
	20,811
2	11 5
Se turn	Cantracta
203	1,100
C Patrices	Reviews



What is bLink Sync?



This is a utility module that synchronizes your **Practice Management Software** with **bLink Pro** to automate transactions and pass data. Our support team will remotely install bLink Sync on your office computer and establish all of the required settings for activation. It is vital that the computer where bLink Sync is installed remain powered on and connected to the internet. If the power fails or the internet connection is disabled, bLink Pro will not be able to sync with your Practice Management Software and pull current data, and subsequently no messaging will be activated.

IF YOUR COMPUTER INADVERTENTLY POWERS OFF, please follow the steps below in order to complete an update push and re-establish the connection between bLink Pro and your Practice Management Software:

- Open the bLink Sync application on the computer. This should be located on your desktop or in the Applications > Solutions by Design > bLink > bLink Sync.app.
- Make sure that in the bottom left hand corner it says database connected.
 **if it does not say Database Connected try the Reset* Database Connection button. If it still does not connect please contact Solutions by Design Support.
- 3. If the database is connected *click the Force Update Push button.*
- 4. The boxes will be grayed out and bLink Pro should begin syncing with our database.
- 5. When the update is finished the boxes will return to normal and the update should be complete.
- 6. Please leave the bLink Sync application open after syncing.
 *bLink Pro will not sync if the sync application is not

open.

What is bLink Doctor Portal?

This is a user-friendly web-based interface that you access by clicking a downloaded shortcut or your website Patient Login button. You will be able to check messages sent from your patients through their Patient Portal, make changes to notification settings for your patients and access On Demand videos.

Note: When logging into your Doctor Portal use the same credentials as your ANDI account.



bLink Doctor Portal

What is bLink Patient Portal?

The bLink Patient Portal is accessed from a login button located on your website.

Similar to the Doctor Portal, the Patient Portal is comprised of several tabs. The Home tab is a snapshot of relevant data pertaining to that particular patient. Patients can check their Message Center on their dashboard, review their scheduled appointments, check their account balance, make online payments, send messages to your practice, adjust their personal notification settings for email and text correspondence and complete a patient survey.



bLink Patient Portal

Note: You can choose the color of the Patient Login button that will appear on your website under Settings within ANDI. If Solutions by Design is not hosting your website, your webmaster can download the code that creates the login on your website in any of the featured colors.

What is ANDI?

APPLICATION NETWORK & DATA INTERFACE



ANDI is Solutions by Design's **web-based content management system.** As our client, you will use ANDI to manage the content and settings for all your Solutions by Design products. Upon receiving your bLink Pro order, login credentials will be sent to you via email. You will need these credentials to access and manage your bLink Pro settings. If you are already a SBD client, you will use your existing ANDI login credentials.

Manage your bLink Pro Settings via ANDI:

There are 2 ways to log into ANDI.

1) You can login to ANDI by clicking on the downloaded shortcut .



2) Or going to **www.andisolutions.com** and entering your user name and password.



Once logged in, you will see icons that represent each of the Solutions by Design products that you utilize in your office. Select the red bLink Pro icon. This is where you control all of your settings for bLink Pro.

Dashboard

litin	
Active O Last Spen Intel 2012 11 61 69 AM	
Arta Statistics	
186	0 Doctors 7
Responsible Parties. 2,175	Appairments 355
🚑 Henrym 7	C 100000000
and Arts Looks	1 0man
	Company .

- Shows status of bLink Pro and date of last sync with your Practice Management Software
- Overview of the data bLink Pro has received from your Practice Management Software

Settings

- **<u>Practice</u>**: Set your practice demographics
- **PMS:** Activate the connection between your Practice Management Software and bLink Pro
- Financial: Select your Payment Processor for online payment within bLink Pro
- **Email:** Create email account name and setup your email signature
- **SMS:** Set the calling parameters for outgoing text messages
- <u>Services</u>: Activate features in bLink Pro including email and text messaging
- <u>Website:</u> Patient Login icon and code for your website provider

Practice

Set your practice Information and practice demographics here by entering the requested information. bLink Pro displays this data in the header of the Patient Portal.

The desired hard and desires areas	
the second second in the second second second	
eneral Information	
atta Nuhe	
Advanced Orthodontist Demounta	
agree dead	
ess caPsolution by design .com	
artist Plane	
559-436-8380	
autor Weisste	
www.solutionsbydesign.com	

Note: For practices with multiple locations, please use the address and phone number for your main office. The Email Signature can be used to list all location contact info and Reminders can be customized with specific location details.

The Practice Email is used for all bLink Pro email message replies, but is not displayed in the Patient Portal.

The Notification Email can be different than the Practice Email since it is used only by Solutions by Design to announce any updates or changes to bLink Pro.

<u>PMS</u>

This is where a SBD Technician will input the necessary selections to connect bLink Pro with your Practice Management Software.

PMS Settings	
an (HA) found (Doil) det (herein (Bring)	
PMS settings have been updated.	
a failuring Practice Management System (MV) settings are required for surr	a to must data them your PMS for use within blank. You may need to contact your P
count suggest representation to notify them that also will be integrating with	blick and single the information reached before.
PMS Application	
TuesOtho 1	
(1997) (1997) (1997) (1997) (1997) (1997) (1997) (1997) (1997) (1997) (1997) (1997) (1	
Services	
Services	11.425111
Services	Nete

Note: Please do not make any changes to these fields unless directed to do so by a Solutions by Design technician. Any changes can disable the connection with your PMS.

Financial

Choose your desired Payment Processor Service from our dropdown menu.

Please fill out all fields that appear after selecting the Payment Processor as each has different requirements. All Payment Processors will require an account number.

OrthoBanc \$	
Rease theck all accepted payment methods	
U WA CARD	
MATTIK CANS	
CISCOVER NETWORK.	
ANDREAN EXPERITE.	
😹 E-CHRON KHRONING	
# 1-ORX SHING	
Financiai Services	(max) (meat
2	Balve
Accept Online Paymenta	Const (mg)
Allows responsible parties to make antine payments.	
	and the second se
Patient Financial Bervices	Catery Catery

Note: You may need to consult with your payment processor if you do not have some of this information. Enter a minimum amount that you are willing to accept as an online payment.

Make sure you click the blue SAVE button at the bottom of the page to update your settings.

<u>Email</u>

Email Account Name

bLink Pro sends emails on behalf of your practice. In order to optimize email deliverability (e.g. passing through anti-spam filters), all emails are sent by our optimized domain, **orthoblink.com.** The Email Account name is added in front of the domain so your patients will recognize who is sending the email. *For example, the Email Account Name "AdvancedOrtho" will have emails sent from "AdvancedOrtho@orthoblink.com".*

The Email Account Name can only be changed prior to starting your bLink Pro services. Once bLink Pro starts sending emails, it is the only means of linking previously sent emails to your account.

blink sends emails on behalf of your pro emails are sent by our optimized domain	ector. In order to optimize blank email defiverability (e.g. passing through anti-spain filters), all n. orthobios.com.
bLink matches incoming and outgoing a name "advancedenthe" will have emails r	mails to your account by setting a unique email account name. For example, the small account any fram "advancedontho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho@ortho
Be highly recommend that you sent this only means of linking previously sent on	only once and issue it. Once blink starts sending emails using this email account name, it is the will be your account.
advancedorthodontics	
mail Signature	
lather than maintaining your email sign	ature at the bottom of every email, we provide this email signature entry, which will append to
he bottom of all your blink emails. Feel	Ree to update this at anytime, and all future emails will use the updated signature.
0	2 · · · · · · · · · · · · · · · · · · ·
	E - 6 * 8 8 8 8 • 6 8 al <mark>* 1 8</mark>
0 < 0.0 0 0 0 for 0 0 0 0 0 0 0 0 Parts 0	E - 6 * 2 2 2 8 - 6 4 2 <mark>6 8</mark>
	E - 6 * 8 8 8 8 • 8 * 2 * 8 * 8*
	E - 6 * 8 8 8 8 * 6 9 3 <mark>6' 8'</mark>
	E - 6 * 2 2 2 8 = 5, 2 ⁴ 2 ³ 5 ⁴ 5 ⁴
	E - 6 * 2 2 2 8 * 6 2 3 6 7
	E - 6 * 2 2 2 8 * 6 ¥ 2 4 X *

Note: To preview your Email Signature go to the Email tab, select any of the email types and click on the PREVIEW AND SAVE button at the bottom of the page. It will preview the entire email message including your Email Signature.

Email Signature

Rather than typing a signature at the bottom of every email, we provide this email signature, which will append to the bottom of all your bLink Pro emails. Feel free to update this at any time, and all future emails will use the updated signature.

You can use the provided options to enhance your Email Signature such as font, size, bold, font color, etc. The Practice drop down menu allows you to use a "token", which will appear highlighted within brackets. A token is information pulled directly from your PMS, saving you the time of typing everything out. Tokens will appear highlighted and within brackets, but upon previewing the message the text will show normally.

Don't forget to SAVE your settings.

SMS: Texting Services

Outgoing Mobile Number: This is the local number we have procured for you to allow SMS messages to be sent. This is not an active phone number, so no replies or calls can be received at this number.

two settings	
Ourganing Multitle +11394190642 Number	
If your patients made outside of the US, you will need to enter the mean For more information on what the international sailing prefix is, head or memory from 011	national calling profile as SMS messages are sent from the US. er to HoustaCallAbroad.com.
Activate \$45 testing by providing a valid mobile phone number below. 7	his should match how you enter mobile \$MS numbers into your
Mis Jahr Lectore the prefix delivery https://www.internet.com/ +15594195642	
Min (dam') include the period a damen. Including from floating konding +15554195642	SME
Min (Barr) include the period advect. https://www.include. +15594199642 SMS Services	(met H) (met H
Min (Barr) include the period address. Handling Tree finders funders +15594198642 BBS Services	(State State (State State Stat
Min (Barr) include the period address. Historical Text Induce Number +15594198642 JAIS Services Appointment Reminder 5M5	BAXE (Beckl), United Status (Beckl), Comp
Appointment Renducer SMS Birthday SMS	EXXE (Beck), Unit Status (Beck) (Beck

Note: DURING INSTALLATION, OUR TECH STAFF WILL PROGRAM THE SMS SETTING FOR YOU. We will be adding "DO NOT REPLY" or "Call our office" to all SMS messages so your patients will not hit reply to contact your office.

International Prefix: If your patients reside outside of the United States, you will need to enter the international calling prefix as SMS messages are sent from the United States. For more information on what the international calling prefix visit **http://www.howtocallabroad.com.**

Remember to always click SAVE to update your settings.

Services

Under the Services sub tab you will see a listing of all bLink Pro features and services. You can see which of these features are currently Running and those you have chosen to Stop. You can use the Start All and Stop All to start or stop all services in each category or individually activate and deactivate each service.

Imail Services	Literal.	(Dist.)
	Sana	
Birthday Emails	ECONO.	(Matt)
Welcome Emails	ECONO.	(Mat)
Appointment Reminder Emails Sends appointment reminder emails to all notification consists for upcoming policies appointments.	Etomo -	(195)
No Show Emails	ESCARE.	(mt)
Recall Emails	STAND	(100)
Post Appointment Emails	Allowed a	
Late Payment Emails	STORES	(101)
Patient Education Emails	STORES	(1941)
Mass Email One time or recording emails unit to all responsible parties or to a specific grouping of records like parties	Here	

This page does not require you to Save your settings, as each Start or Stop button auto saves for you once selected.

Website

Here is where you can copy the graphics and link code for the Patient Login button. If Solutions by Design is not hosting your website then your website administrator will need this code to allow the Patient Login button to appear on your website. You can copy and paste this code into an email and send it to your website administrator.



- <u>View PMS Settings</u>
- Download bLink and ANDI shortcuts
- Download bLink Sync

Under the Download Tab you will see the selected Practice Management Software utilized by your practice. *Please do not make any changes unless directed to do so by a Solutions by Design technician, as it will disrupt the connection with your PMS.*

The second area is to download shortcuts on all the computers in your office for ANDI and your Doctor Portal login. Just click on either Mac OS or Windows depending on which type of computer you are downloading onto.

You will also see a bLink Sync download button. This is for use by our technicians and will have been installed on your server. *Please do not download unless directed to do so by a Solutions by Design technician, as it will disrupt the current connection with your PMS.*



- <u>Review videos</u>
- <u>Select Care and Use of Appliances videos for</u> <u>your library</u>
- Select Compliance videos for your library
- Select Procedural videos for your library

The video section allows you to select the videos that correspond to the way you practice. All of the available videos are preloaded for your practice. You can preview any of the videos by clicking on the Play button next to each description.

Camplian	ica Procedures	
ffer many Patien those videos that	t Education Videos for you to share with your patients. These video pages it fit your practice.	allow you to s
re & Use	(A	id/Remove Video
-	Bite Turbos	play
-	Bite Turbos can be affixed to the back of the upper teeth. It prevent the upper and lower teeth from closing too far whick creates a deepbite.	(annove)
	Damon Splint	(Calero)
	The Damon Splint is used for minor south movement typically after braces. The appliance is molded to force the seeth into the intended position.	(remove)
10	Damon System	() play
No.		Cramova.

You can remove any of the videos from your video library by simply clicking the Remove button at the right hand side of each video description.Don't worry, that video is not gone forever. If you change your mind and wish to add it back to your practice's library, **click on the Add/Remove Videos button** at the top of the section. You will see the complete list of videos with your currently selected videos highlighted in blue.



To add a video back, click on the small box located to the left of the video image and scroll all the way to the bottom of the page to Save.

There are 3 tabs for videos:



- Care and Use refers to videos on the care and use of specific appliances.
- Compliance videos demonstrate to the patient how to comply with the clinical guidelines.
- **Procedure** videos provide treatment animations for a variety braces types, removable appliances, fixed appliances, extraction and surgical cases.

Videos are utilized in 2 different ways: On Demand or playing videos one at a time in the office, and **Patient Education Emails**, as automated email distribution.



bLink Doctor Portal

On Demand allows you to call up any of our educational videos instantly through your **Doctor Portal** for patient chair-side presentation. You also have the option of emailing the video home for the patient by clicking the Email button. A new screen will open. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject and message to

accompany the video and then click Send. The patient will have a message waiting for them when they arrive home. **Auto-event distribution of Patient Education Videos** bLink Pro can be synchronized with your practice management software applications to pre-schedule the automatic distribution of patient educational videos as the patient progresses through treatment. You can select videos that correspond with each appointment type and designate the desired timetable for the distribution.

This auto-event distribution is called Patient Education Emails and includes the following features:

- Synchronize each appointment type with corresponding educational videos
- Preset the timing for the email distribution of each message up to 30 days prior to the appointment or 30 days after
- Customize an email message including any pertinent information based on the appointment type

To read more on this subject see Patient Education under the Email tab.



- Edit Conversion Message Content
- Edit Welcome Message Content
- Edit Appointment Reminder Message Content & Settings
- Edit No Show Email Message Content
- Edit Recall Email Message Content & Settings
- Edit Post Appointment Email Message Content & Settings
- Edit Late Payment Email Message Content & Settings
- Edit Patient Education Email Message Content & Settings
- <u>COMING SOON: ETOONS Email Module</u>



All of the email settings located under each sub tab follow the same formatting guidelines and are simple to use. You can use our default messages or you can customize each to your preferred script.

Conversion Email:

If you are transitioning to bLink Pro from another reminder service, we recommend using this one-time Conversion Email to inform your patients of this change. The system will create new login credentials using the Financial Responsible Party's email address and a computer generated password for all existing patients. This Conversion Email will only be sent once upon starting your bLink Pro services. After that, any new patients joining your practice will receive a Welcome Email.

ou're tuanstioning to bLink from another servick, we recommend using this one-time comersion sting responsible parties of this transition. After this conversion enail, all new responsible partie closer email.	email to inform s will be sert the
iervices	
	Sciences
Conversion / Kick-Start	COLUMN 1
This one-time service is used to cick-start blink and enable all of the other services once the initial 'conversion' emails are sent to existing responsible parties with email addresses. This service will be enabled after the initial PMS data synchronization passes inspection and your blink account is completely configured.	
Subject	
Spractice.name@'s New Online Portal	
Message Content	
As part of our ongoing effort to offer our patients the best quality service, we're proud to switch to the new bLink patient portal. This new portal offers a quality and simple design many great features including:	arnounce our while offering
Appointment Reminders Online Payments	
	The second li

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE. There is also a SEND TEST EMAIL button which sends an email example to the email address used to sign into ANDI.



Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Welcome

Upon going live with your bLink Pro services, the Welcome Email is sent to all **Financial Responsible Parties** with a valid email address saved within your Practice Management Software. After that, any new patients joining your practice will receive a Welcome Email within 24 hours of being entered into your Practice Management Software.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

ervices.		
	Some	
Welcome Emails	(COMPANY)	(arc)
ubject	Cher	n tehet
Autor (B) August (B)		
Altarection name: Patent Online Portal		
		- 54
● <	**	
(Bregonskefferty fortriand). Wecome to (Boreston name) and aur arise petert porti. We are sprear packed and have invested in the arise inter port for pur conventes. We our effort officient and officients. This patient portil efferts you has done	that to providing you with the best excellence in ou Ne tour that this technicagy will make conneursible evence of 247 macross to your concern information	, 28
 Very set the point in division the your very protects do contracted by us, in Dirack appointments unline Very part into Affidience Duray seture payments white Caustres have a communication with you, shoosing to excise end Extra address have a communication the appointer patience. And main frame: 	on yao alar al andro 2010 test masaagaa	
		1.00

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Appointment



There are 3 Appointment Emails:

- Confirmation
- First Reminder
- Second Reminder

Confirmation Email

This initial appointment Confirmation Email is a digital version of a "Your Next Appointment is..." card. It is sent to the **Financial Responsible Party** and any additional contacts that have been added to the patient's bLink Pro Notification settings for a newly scheduled patient appointment. Emails are sent within 24 hours after the appointment is scheduled.

First furnisher Sacord furnisher	
ential accentises performancemental is sent to all contacts for a newly scheduled patient equipments: • the appeliations is scheduled.	Denaits are sent within 24 fours
ervices	
	Batter
Appolntment Reminder Emails tents apportment neuroder amais to all notification random for opposing patient apportment.	
ubject	(mass second
Passe N June N Alex N Agent, N Mar N	
Getradoale: Appointment Schwalauet Int (Spatiant Instituting)	
	-
lessage Content	Rotes Delait
@ + # # + + + = = = = =	
$\operatorname{res} = [\mathbb{T}] \ \operatorname{res} [\mathbb{T}] \ = [\mathbb{T}] \ \underline{u} = [\mathbb{T}] \ \underline{u} = [\mathbb{T}] \ \underline{u} = [\mathbb{T}] \ \underline{u}^* \ \underline{u}^*] \ \underline{u}^* \ \underline{u}^* $	
river T tee T root T Ame. T tee T	
(planter forfreng)'s apportant with Dr. (planter leafform) has been acheduled for (popuration take), or the lass forward to assers there?	[Repairing line]

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

First Appointment Reminder Email

The First Appointment Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Services	
	Statue
Appeintment Reminder Emplie	Stand (stat)
Sends appointment reminder smalls to all notification contacts for sociening patient appointments	
Default Notification Settings	
This default setting is ONLY applied to NUW responsible parties. Responsible parties have the and add new ones at any time.	aption to change this notification
Tend The York boundary services	
1 Week before the Appointment	
Subject	(Restore Delast
	Personalities
Auto B Date B Auto B Auto B Die S	
Efforcter nemati a toxing toward to seeing (Spatiant Institional)	
Message Content	d (Some Mod
Møssage Content	a (home blad
Message Content	(Burne Schul
Message Content $\begin{array}{cccccccccccccccccccccccccccccccccccc$	(Sume Mud
Message Content	(berrer felde
Message Content Message Content	(trans tida)
Message Content Message Content	, trans trian , trans trian ,
Message Content Message Content	, burns bila , burns bila ,
Message Content Message Content	, theory block
Message Contant	, there the set
Mussage Content	(beine bild

Default Notification Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click **SAVE**.



There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.



If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

This default setting is ONLY applied to	NEW responsible parties. Responsible parties have the option to change this notification
and add new ones at any time.	
2012/2012/06/12 2022/202	
1 West before the depointment	
I were beine me Appointment	
Never	
1 Day before the Appointment	
2 Days before the Appointment	States Inflat
3 Days before the Appointment	The second
4 Days before the Appointment	North March 19 (March 19)
5 Days before the Appointment	Contraction of the local data and the local data an
6 Days before the Appointment	Present of the second
1 Week Before Ine Appointment	
2 Weeks before the Appointment	
a weeks before the Appointment	
a section before the Appointment	

Second Appointment Reminder Email

The Second Appointment Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Default Notification Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Services	
	Status
Appointment Reminder Emails	\$24475 (mm)
Sends appointment reminder emails to al	notification contacts for upcoming satient appaientments.
Default Settings	
This default setting is ONLY applied to t and add new ones at any time.	ADM responsible parties. Responsible porties have the option to change this net-ficatio
This default setting is ONLY applied to f and add new ones at any time.	AIM responsible parties. Responsible parties have the option to change this net-ficatio
This default setting is ONLY applied to 7 and add new ones at any time. Send this locate appointment remoder [2 Days before the Appointment] - Never - Day, before the Appointment	With responsible parties. Responsible parties have the option to change this net-fication
This default setting is ONLY applied to 7 and add new ones at any time. Send this isoons appointment reminder [2 Days before the Appointment - Never - 1 Day before the Appointment 2 Days before the Appointment	EW responsible parties. Responsible parties have the option to change this net foction
This default setting is ONLY applied to 7 and add new ones at any time. Send this local appointment remoder [2 Days before the Appointment) Day before the Appointment 2 Days before the Appointment 3 Days before the Appointment 4 Days before the Appointment 5 Days before the Appointment 5 Days before the Appointment	All responsible parties. Responsible parties have the option to change this net factor (Research Drive Statement Drive Statement Drive (Research Drive))
This default setting is ONLY applied to 7 and add new ones at any time. Setting the social appointment seminater [2 Days before the Appointment 1 Day before the Appointment 2 Days before the Appointment 3 Days before the Appointment 4 Days before the Appointment 5 Days before the Appointment	EW responsible parties. Responsible parties have the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change this net focus (Research of the option to change the o

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

9					ORTHOD	ONTICS
We're lo	oking forwa	rd to seein	ng Maggie	on 05/1	4/2011 at	10:00 am.
Please note: If this ramindar time 24 hours	you have changed or may not reflect that o after a change has b	canceled your ap hange. A new ram on made in our so	pointment within inder will be pro cheduling system	the last 24 hour alled to you with	s, the date and ti your new spoci	me designated in troust date and
		C	ONFIRM	(1993) 1993		
	Clie	k to confi	irm your a	ppointm	ent.	
					1 to a	Link'

No Show Email (Missed Appointment)

The No Show Email is sent to the financial responsible party and any additional contacts that have been added to the patient's bLink Pro Notification settings when an appointment is marked as missed in your Practice Management Software.

Services	
	Dates
No Show Emails	(100)
Subject	(American)
Trans B (mar. B) rate B) mare. B) when	2
He mass (doctor) the area of the comment as an interest of the comment of	N
Mensage Content	(Batter Schot
0 - 1 0 0 0 1 E - 4 + 8 + 8 H	
The D has D & J U to St V And A Art B.	
an movel (power inclusing) (power antivers), who say an approximit on Department only and the (Department and Provide and and the et (Depart Prover aneary restricted in a sporthers, press designed to reste	(Representation antical), (Representation) a Japanet () is reconciler in cost in preside

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.



Recall Messages

There are 2 Recall Emails:

- First Recall Reminder
- Second Recall Reminder

First Recall Reminder Email

The First Recall Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Default Notification Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Services	
	Status
Recall Emails	East (mr.
Settings	
Tend the first recall remarker	
K Weeks before the Appointment is Due	
Subject	Restory Defin
Anna (R) June (R) April (R) April (R)	
It's time for another yest with ((Bintedice Name))	
Nessage Content	Reviews Calls
· · · · · · · · · · · · · · · · · · ·	
$ z_{int} = \mathbb{E} \left[\left[\mathbf{s} \mid t \mid \mathbf{y} = \mathbf{x}_i \mid \mathbf{x}^i \mid \mathbf{y} \mid \mathbf{A}_i \cdot \mathbf{X}^i \right] \right]$	
Austra D South D Aven D Apart, D Day D	
According to but records, if is tree for <u>(Excellent ExcName)</u> (<u>Experient ExcName)</u> to here their next a Please call our effice at [<u>Briscics prove</u>] to achedule the appointment.	opsinment wheduled

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.



Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This

will re-load our default message and wipe out any changes you had made.

Second Recall Reminder Email

The Second Recall Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

	Status
Recali Emails	Elvent (.see
lettings	
2 Weeks before the Accountment is Due	

Default Notification Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.



Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Post Appointment Email

The Post Appointment Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings. This email allows you to connect with the patient following their appointment time and offer a survey to gather valuable information about their experience.

and a straight of the straight	
e. "Past Appointment" email allows you to connect with the partners, contacts and effer a survey generoe.	to partner naturable intermation about the
Services	
	20404
Peat Appointment Emails	ELEVER (200)
Settings	
Level the land proceeding actual	
Immediately after the Appointment 2	
Arbon samilies the test cost amplificant and, with at least	
6 Months after the prior Post Appointment Email	
Subject.	(Aurora licita)
And Wilson Wilson Wilson, Wilson Wil	
Excess hat a Darket for kenal	-
	4
Message Content	Aution Dylay
OLUBRRA- BELSTREET	
100	
Parts 2 June 2 April 2 April 2 April 2 April 2	
these year seeing (South 1.5chilane)) or (Second there eachdor). We share to raise you confid	table and provide the loss service
people, we you people the a non-we to evaluate your experience in our effort. They also have people people of (Contract unique) and evenues the doct support logand, where the Contracts Ten	peur fon ou ven ne su gind
There your	
1.12.532.12	

Settings

The first drop down menu allows you to select when you want to send the email.

The second drop down menu allows you to select how often you want the email sent.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.



Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Financial Email: \$ Due or Past Due

The Financial Email is sent to the Financial Responsible Party when an account is past due according to the records in your Practice Management Software.

Settings

The first drop down menu allows you to select how late the account must be to be considered past due. The second drop down menu allows you to select how often you want the email sent until the account is current according to your Practice Management Software.

	I TRADUCT
Late Payment Exuals	Contra (min)
Settings	
fertil die twe payment implif meganitäte party te	
Over 50 Days Late 2	
Toris have pagement sensitions to reason the surfless	
Berry Month 2	
Subject	(Junea Isla)
rate B trans. B rate B	
	14
Message Content	(Among Palas
THE STREET BUD DESCRIPTION OF ME	
Parts (2) Proces (2) False (2)	
The basis retrievened your payment for Elipstein Softwaren. New account is pair the	Pay tox to succ use courges.
This is a remarker that your monitor payment is due to the title of the report. Plasses a perment, allocke dissipant this furnificar.	and in your payment. If you have sheetly made this
Ryou would be addressed account or appendix entirity matter, log into (Borechus web) Death and for one constant affection	elleği ur sall va at -Elphotos phoneji.

Use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.



There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Patient Education Emails

Educate your patients automatically with patient education emails and videos. These emails are scheduled based on appointment types and can be sent before or after an appointment.

Click on the ADD button to create a new Patient Education Email.

0.0	10 15	a	D				
Par	(f) ===	B J U -	- z, z' 🥔	Set Me			
Patter	2 (mar)	2 maper	n 😤 (rear)	S mar. 5	5 one 🔅		(9)
ttachm	ents					(aach	and Vald
ttachme	ents					(100.00	anne (1963
ttachme	ents						

Schedule Video Distribution by Appointment Type

The first drop down displays a list of appointments from your Practice Management Software. The second drop down is used to schedule when you would like to send the email, either before or after the Treatment date.

Alguiners		
- Select Apportunest, Type column Uncovered Attachment to Anthwar Mays transfs and Improvement for applance Gol attachments and PN Mark Institute Mark Institute and Alloce mer withs		
Upathent vice Application delivery Upatient Delivery UP-ette with pano	1 mm - 1 mg - 1	4
lend & Bond lend 75 lend towers lend togons		
8 41.0 8 41.0		
H LLA H LLT	1 M A	

Type a subject line for your email and message content. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent the text will display normally.

lideo Selection	
•	Adult Treatment
•	Bionator
• 🛃	Bite Turbos
•	Damon Splint
• 67	Damon System
0	Distalizers
	Atlach Selected Videos Gar

Attachments

Click on the ADD/REMOVE VIDEOS button to include/attach any of the videos in the email. There is no limit to how many videos can be included and you can choose not to include any videos.

Click SAVE. bLink Pro will now send this email to all patients with this appointment type scheduled in your Practice Management Software.

To edit an already existing Patient Education Email

Simply click the EDIT button from the Patient Education Email screen, make your changes and click SAVE at the bottom of the page.

You can also DELETE an entire Patient Education Email\ by clicking the DELETE button from the Patient Education Email screen.

Mass Emails

Need to notify all of your patients all at once? Use the Mass Email feature. This one time email will be sent to all Financial Responsible Parties in your Practice Management Software.

Email Design Settings

The drop down displays a list of the design templates available for the background of the email.

Note: to review the design, select it form the drop down menu then click on PREVIEW AND SAVE at the bottom of the page.



Type a subject line for your email and message content. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent the text will display normally.

Click **SAVE.** bLink Pro will **IMMEDIATELY** begin sending this email to all Financial Responsible Parties in your Practice Management Software.



Edit Appointment Reminder Text Message <u>Content & Settings</u>

 Edit Late Payment Email Message Content & Settings

All of the SMS or text message settings are located under each sub tab and follow the same formatting

guidelines as the email messages. You can use our default messages or you can customize each to your preferred script.

is in the first appointment reminder SMS that is vert to all contacts for a scheduled patient app	
	doines.
Services	
	Sutur
Appointment Reminder BMS	STOPPER (JALA
Settings NOTE: These settings are shared with the appointment reminder emails. Any changes in as well. Send this first appointment investor (1) Week before the Appointment (\$)	ude here will effect the small
Settlings NOTE: These settings are shared with the appointment reminder emails. Any changes in as well. Sections that appointment reminder 1 Week before the Appointment \$	ade here will effect the emain
Settings NOTE: These settings are shared with the appointment reminder emails. Any changes in as well. Settings for appointment reminder 1 Week before the Appointment \$ Message Content \$	ade here will effect the small
Settings NOTE: These settings are shared with the appointment reminder emails. Any changes n as well. I week before the Appointment (*) Message Content Promo @	ade here will effect the small (Removi Dela
Settings NOTE These settings are shared with the appointment reminder emails. Any changes n as well. Sections from appointment reminder T Week before the Appointment Message Content. Promo B Concert Statement for (Booter Contents)	ade here will effect the amain ferrers bein

First Appointment Reminder SMS

The First Appointment Reminder SMS is sent to the Financial Responsible Party's cell phone number and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Second Appointment Reminder SMS

The Second Appointment Reminder SMS is sent to the Financial Responsible Party's cell phone number and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Settings

This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Services		
		Status
Appointment Reminder SNS		RMMC (==)
Settings		
NOTE: These settings are shared with th	he appointment reminder emails. Any changes made t	tere will effect the emails as well.
Send this second appointment removalet		
Send this second appointment removed 3 Days before the Appointment		
Send this second apportment remodel 3 Days before the Appointment Never		
Send this second appointment remodel 3 Days before the Appointment Never 1 Day before the Appointment Days before the Appointment		Generation
send this excand appointment resultat 3 Days before the Appointment Never 1 Day before the Appointment 2 Days before the Appointment 2 Days before the Appointment		(Juniors Delia)
send this econd apportineer revealer 3 Days before the Appointment Never 1 Day before the Appointment 2 Days before the Appointment 4 Days before the Appointment	W Agent, W Day W	(Autors Below
send this econd apportuneer rewarder 3 Days before the Appointment Never 1 Day before the Appointment 2 Days before the Appointment 	T Amer. T Line T	(Juniors Belief
Send this accord appointment rewarded T Days before the Appointment Days before the Appointment Days before the Appointment Days before the Appointment 4 Days before the Appointment 6 Days before the Appointment 6 Days before the Appointment	N Asso. N Line N	(, Renter, Debot
Send this accord appointment rewarded T Days before the Appointment Never 1 Day before the Appointment 2 Days before the Appointment 4 Days before the Appointment 5 Days before the Appointment 5 Days before the Appointment 1 Week before the Appointment 1 Week before the Appointment	T Amer. T Line T	(Renters Debat
In this scard apportunien resolution T Days before the Appointment Never 1 Day before the Appointment 2 Days before the Appointment 2 Days before the Appointment 5 Days before the Appointment 6 Days before the Appointment 1 Week before the Appointment 2 Week before the Appointment 3 Week before the Appointment	E Asset. E Lifes E	(Juney Delas) S

Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message. If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Financial SMS

The Financial SMS is sent to the Financial Responsible Party when an account is past due according to the records in your Practice Management Software.

Settings

The first drop down menu allows you to select how late the account must be to be considered past due. The second drop down menu allows you to select how often you want the text message sent until the account is current according to your Practice Management Software.

Services	
	Stative
Late Payment SMS	(set)
Settings	
NOTE: These settings are shared with the late payment emails. Any c	changes made here will effect the emails as well.
Send the late payment enail if responsible parts is	
and the local sector of a second sector of a sector of a second sector of a second sector of a second sector	
Over 35 Days Late \$	
Over 10 Days Late	
Over 10 Days Lote 2	
Over 30 Days Lose 2 Sent late payment emails to esponsible perces Every Month 2	
Over 10 Days Lote 2 Sect late seyment emails to esponsible parties (Every Month 2)	C Researc Dataset
Over 30 Days Lote 2 Sent late payment emails to esponsible parties (Every Month 2) Messagge Content	Lanano Detait
Over 30 Days Lose ‡ Sent tate payment emails to esponsible parties Deny Month ‡ Massage Content Parties ** Content	, Annuare Sector
Over 30 Days Lose ‡ Sent late payment enables a expensible parmes Deny Month ‡ Message Content Planter *	, denote Dehai
Over 30 Days Lose ‡ Sent late payment enables to esponsible parmes Deery Month ‡ Message Content Planter @ Deerset	j, Annare Pylan
Over 10 Days Lote 2 Sint late sayment enails to especiable parties Bivery Month 2 Massage Content Plantes Dervet Plantes	L Ressort School

Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message. If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Marketing

- Patient Portal Announcement
- Birthday Email
- Birthday SMS

Patient Portal Announcement

The Announcement is a message displayed at the top of every page of the Patient Portal.



Type any message that you wish your patients to see upon opening their Patient Portal. This feature can be used to announce new office hours, specials, contests, etc. no yellow box will appear in the Patient Portal, even if the Announcement Service is RUNNING.

Birthday Messages



The Birthday Email is sent to the Financial Responsible Party and any additional email contacts that have been added to the patient's bLink Pro Notification settings on the patient's birthday.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click **SAVE**.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Birthday SMS

The Birthday Email is sent to the Financial Responsible Party's cell number and any additional SMS contacts that have been added to the patient's bLink Pro Notification settings on the patient's birthday.

ervices	
	Status
Birthday SMS	ALANING (ALAN)
essage Content	(assessed the fail in
France (1) Date (1) Pearl (1)	ي ا
(Sprectice server) winting (Spretext.Institute) a happy birthday!	
	1

Feel free to use our default message, make changes or create an entirely new message. Due to some phone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are still able to utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.



- <u>Review log of all bLink Pro Email messages</u>
- <u>Review log of all bLink Pro SMS messages</u>
- <u>Review log of all ACH payments</u>

Email Log



You have search options available to help you locate a specific email. Type in the patient's name, Financial Responsible Party's name or email address and select from the drop down menu the message type and click on search.

Status Codes



You should only see this status while in Test Mode.



Click on the View button to see the error message.

The View button shows you exactly what the patient received in their email inbox.

The Resend button resends the message to that specific email address.

SMS Log

This is a list of all the SMS messages that bLink Pro has sent in the last six (6) months.

You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

pe.1 %	SMS Log	ACH1.00					
SMS	Messag	es Sent					
		Q	Select	Type		:	Search
	450 Sent #	toblie 18 Pages: 🚺 2 (3) 4. To	5 -11 + La For Patient	Туре	Status		
03/3	8/2014 8:45 am	brian.smith@gmail.com (Brian Smith)	Brian Smith	Mass Email	-	Vese	Reserved
03/3	8/2014 8:45 am	brian.smithi@gmail.com (Brian Smith)	Brian Smith	Mass Email	-	Ver	Resent
03/2	7/2014 0:30 am	smith@gmail.com (Richard Smith)	Adriana Smith	Mass Email		View	Resend

You have search options available to help you locate a specific text message. Type in the patient's name or Financial Responsible Party's name and select from the drop down menu the message type and click on search.

Status Codes



Resend

Resend

Resend

Click on the View button to see the error message.

The View button shows you exactly what the patient received in their email inbox.

The Resend button resends the message to that specific email address.

ACH Log

Status

UNSENT

SENT

SENT

View

View

View

ACH stand for **Automated Clearing House** and refers to online payments made by your patients through their Patient Portal. This is a list of all the online payments processed through bLink Pro last six (6) months.

You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

board Settin	gs Download Videos Er	nall SMS Marketing			
ACHI			Logs Supp	ort Reports	
ng Filts up ransactions	OG ACH Log Made Spettl is 2 Pages: 🚺 3 — 4		0		2
			~		Search
Attacopted =	Responsible Party Patient	Name Dr. Warsattion	Trainsection Typ	a Antant	Search
Attornpted = 11/27/2013 3:44 pm	Responsible Party Patient	Name Dis Yrematten Jackie Likeweaver	Transaction Typ	Articulari 7.60	Search Status
Attempted + 11/27/2013 3.44 pm 05/13/2013 7.36 pm	Responsible Farty Fallers	Nume On Transaction Jackie Unewayer Jackie Unewayer	Transaction Typ Seven	7.00	Search
Attampted + 11/27/2013 3 48 pm 05/13/2013 7 36 pm D4/16/2013 11 09 pm	Responitive Party Patient	Name Do Transaction Jackie Lineweaver Jackie Lineweaver Jackie Lineweaver	Transistion Typ Sevel Credit Card eCheck	 Armune 7.00 1.00 2,330.00 	Search Statut

To navigate the multiple pages click on the arrows or specific page number at the top of the section.

board Settin	gs Download Vid	icos Em	a SMS Marketing	Logs 5	iupport	Reports	
ACHI	00		/				
AUTE	09						
og Histog	ACH LOS						
ransactions	Made	1			_	_	
OR Treese	ritoetsi in 2 Pages: 🛐 🗉			Q.			Searc
Attanged =	ethebi in 2 Nunc 🛐 3 Responsible Farty	a Fallara	Name On Transaction	Q. Transm	n Type	Ampant	Searc
14 Trans Attanged + 11/27/2013 3.48 pm	dreetsi in 2 August 🚺 3 Responsible Party	4 Fallere	Name Dr. Transaction Jackie Liteweaver	Q Transie	а Туря	Articautt 7.60	Searc State
50 Trans Attangeted + 11/27/2013 3.48 pm 05/13/2013 7.36 pm	etrophi in 2 August 🛐 2 Responsible Farty	4 Patlant	Nume De Tranaction Jackie Lineweaver Jackie Lineweaver	Seved Credit Card	n Type	Arteaut 7.00 3.00	Searc State
00 Trans Artumpted = 11/27/2013 3:48 pm 05/13/2013 7:35 pm 04/16/2013 11:09 pm	Headd in 2 Pages 1 2	4 Patlant	Name On Tranaction Jackie Linewearer Jackie Linewearer Jackie Linewearer	Cude Card eCheck	п Туря	Antesant 7.00 1.00 2.330.00	Searc South COLOR COLOR

You have search options available to help you locate a specific transaction. Type in the patient's name, Financial Responsible Party's name or card holder's name and click Search.

Status Codes

			The payment
Transaction Type	Amount	Status	was processed.
Saved	7.00	SUCCESS	The payment did not process
Credit Card	1.00	FAILED	correctly.
1.110			Contact
eCheck	2,550.00	SUCCESS	Solutions by Desian for



This allows you to send a message to the Solutions by Design Support Team.

OPEN Problem Tick	Kets blas Podud		
Gen Trainers			
	Type (Publish	1)Protect(\$634	
OPEN Problem Tickets			et.)
a frebelyd			-
All controls and below			

for your benefit only and has	e not actually b	een sent to	any potients		
Ticket information					
I have a Problem 0					
with this Product					
blink \$					
Select					
No Signal					
				-	
Here are more details				-	
mease contact our critice for detail	is about our ex	isong conne	coon.		

- Click New Ticket to create a message.
- The Account field will automatically populate with your practice's account name so we know who the message is from.
- Select the message type.
- Select the Product.
- Type a Subject and message details then click SAVE to send the message to one of our Support Team. A technician will then reply via email or call your office to offer assistance.



Review the confirmation status of all future appointments. Remember that green Confirmation button included in your First and Second Appointment Reminders? This where bLink Pro keeps track of everyone who has confirmed from those Appointment Reminder Emails. This report can be filtered by the following criterias:

- Patient Name
- Financial Responsible Party Name
- Appointment Status
- Specific Starting and Ending Dates

further details.

Once you have selected your filter criteria(s) click Update Results to refresh the page.

	птероп
for your benefit only and have not actual	y been sent to any patients.
ppointment Confirmation Reports can be sorted and priv	nted based upon your filter specifications.
Filters	
Name or Email	
Appointment Status	
All Appointments -	
All Appointments	
Only Confirmed	
Enders Onla	
orang one	
Update Results	
Results	
and the second	Co
T Algebraichen HEIG	25 per page 🗘 bind
이것을 방법 수 있는 것 같은 것이 많이 있다.	

You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending. You can select how many results you wish to display and the printer icon allows you to print the report.

Note: the Action column is purposely left blank to allow space for written notes when the report is printed.



Doctor Portal

This is a user-friendly web-based interface that you access by clicking on a downloaded shortcut or your website Patient Login button. You will be able to check messages sent from your patients from their Patient Portal, make changes to notification settings for your patients and access On Demand videos. Note: When logging into your Doctor Portal use the same credentials as your ANDI account.

ADVAN	CED	Advanced Orthodentiat Dome, r 452 Optio Optio, CA 930 559-436-82 Visit Optio
1 Constant	Q 2	States States
August 26, 2014 11:41:47 am	Solutions By Design	Gizmodo Peed
Partly Cloudy	Alles is available! Weicanst to black!	11 Onver Ways Other Are Tailing Advantage of Public Spare
82°F		A supplier three states A
	allask Path Directly Inam Delakin Management We will bedo be anneaeting a Jacob Rei De Bernard De State Hunggement DCos	A garwan skywerspor, A arthwellt Ehrery, A Rheiting ynni, R Elfer Silve aren't. These area arms of the Rheitics in the Pinen By Readys compatibies answarshal hading by staffer data answarshaladily sucharstating by the superinters of Barth.
BZ*F	Albeit Aptis Directly Apen Doubles Management Well same for executing a disease and the the submarial displace Management Abbie Message Center	A person observation, A activate Distary, A Tooling press. A Dir Um part. These press and the distallation is the Plann IP, Plangler compactions atomicscool hadra by call or 2007. In the argumentation of the the Area and the and the distance of the head of the argumentation of the the head of the argumentation of the Argumentation of the head of the head of the argumentation of the head of the he

bLink Doctor Portal

Home Tab

- The time and weather are based on the location entered in your ANDI account.
- The feed includes current posts regarding bLink Pro and its features such as updates, announcements, content changes, etc.
- The News feed is streaming news and events from the list of providers located at the bottom of the post area.
- Click on the down arrow to switch feed providers. We are planning on continually adding additional RSS feeds.
- The Live Support link allows you to chat online with our support staff. When one of our Support Technicians is available the "on-line" indicator will display.
- The Send Support Email is a quick link to send our Support Team an email.

Message Center

The Message Center lets you know if you have any new messages from your patients. Click on the red Message Center Tab to view these messages.

	AI	HODON	ED	Advanted	Arthudustlat Dona, rea 4E2 Oosis An Sato 23 Oosis, CA 80612 539-434-530
ł		-	o 1	×ta− Saa	
Mars	inge Inbox				(Anit Printing)
-	Massaring 1	1144	Patient .	Subset .	
-	##/14/2013	Ten Anderson	distant der banden		=
	84/83/2813	Ten Anderson	Colline Berlander	enver appalatmant	=
e					
0 0	11/02/2011	Est.Andwase	Ballac Definition	Qualities reparding braves	=

Compose – Write a message to your patients. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject, message, include any of the On Demand Videos and then click Send.

Inbox – displays messages from your patients. Click the red View button to view the complete message.

Sent – displays messages that you have sent to your patients. Click the red View button to view the complete message.

The grey **New Message** button directs you to the Compose tab to create a new message.

Patients

The Patients Tab gives you access to your patient accounts within bLink Pro. From here you can view the patient's account information, appointment history, transaction history (online payments), and current notification settings. You can even make changes to a patient's notification settings if they are unable to do so themselves in their Patient Portal. This comes in handy for those patients that are not very tech savvy or maybe don't have internet access.

	B (5)		-23 - 137 137	S
earch for a	patient			
arch for patient	1 Carton			
	(New)	callent.)		
atient List				
State Paralisments for 3		AL		
Nrst Naine	Last Nome :	Phone	Birth Date	
See Acct #	3664		12/30/1899	Visir Pellint
lan	Aalberg		07/22/2003	View Patient
Aeron	Andresk	(778) 428-5819	06/22/1991	View Pallent
Nomas	Arro		05/13/1990	Utrue Pastent
Leanew	A200		08/28/1996	Unior Passant
Imily	Aase		05/26/1999	View Patient
Deveo	Abbett		01/23/1992	(Wese Patient
				Many Publicat
Cody	Abbett		00/31/1993	Contraction of the second second

Note: Changes to the notification settings in BLink Pro DO NOT transfer back to your Practice Management Software.

On Demand Video

There are 3 tabs for videos: Care & Use, Compliance and Procedures.

- **Care and Use** refers to videos on the care and use of specific appliances.
- **Compliance** videos demonstrate to the patient how to comply with the clinical guidelines.
- **Procedure** videos provide treatment animations for a variety braces types, removable appliances, fixed appliances, extraction and surgical cases.

On Demand video allows you to play any of the selected educational videos instantly for patient chair-side presentation. Just click on the red Play button to the right of the video description.

Note: To add or remove videos for your On Demand library, refer to Video Settings through ANDI.

You also have the option of emailing the video home for the patient by clicking the Email button. A new screen will open. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject and message to accompany the video and then click Send.

Help & Support

The Live Support link allows you to chat online with our support staff. When one of our Support Technicians is available the "on-line" indicator will display.

The Send Support Email is a quick link to send our Support Team an email.





Patient Portal



bLink Patient Portal

The Patient Portal includes the same weather feed, a quick link to complete a practice survey and a link to

correspond via email with your office. A Recent Transactions and Upcoming Appointment register is also displayed *(if these features have been enabled by the practice)*. Any messages sent using the Doctor Portal are accessed through the patient's Message Center shortcut on the dashboard.

The bLink Pro patient interface is user friendly and very easy to navigate. Within the Patient Portal patients will be able to:

- Review messages sent using the practice's Doctor Portal including videos and send messages to the practice's Doctor Portal
- Review their upcoming and recent appointments
- Check their account balance (if this feature is enabled by the practice)
- Make a payment on their account and review their online payment history (if this feature is enabled by the practice)
- Submit a Patient Survey
- Change their password
- Personalize their notification settings including the frequency of email and text reminders, and add additional email addresses and cell phone numbers

Message Center

	AD	HODONTI	D	Advanced G	Abedontist Doma, m. 451 Clovis An Suite 13 Clovis, CA 9361, 555-436-638
4	Welcome	e e	5	r	- *=
1000					
Aurss	ase inbox	-			New Research
Contraction of the second seco	age Inbox				(Merc Proceeder)
C Mess 2 Mar	age Inbox ages dereved 1	ere .	Potest	Sugart	(Nor Rossey)
Aless 2 Mess	age Inbox age Inbox ages Accessor 1 xx/82/2011	Prom Dr. Act Hilton	Petaar Billar Berlewitz	Sintjurt Af tim	
Aless 2 miles	age Inbox Age Inbox Agest Actived 1 Actived 1 Active 1 Active 2	Prom Dr. Ask Millon Dr. Rok Millon	roteet Silae betende Silae betende	Soulpiert Af Ban AE: This is a few feat	Gree Basses

Compose - Allows your patients to send a message to your Doctor Portal. Select from the drop down which patient the message pertains to, type in a subject, type the message, and then click Send.

Inbox – displays messages from your Doctor Portal to the patient. Click the red View button to view the complete message.

Sent – displays messages that your patient has sent to your Doctor Portal. Click the red View button to view the complete message.

The grey **New Message** button directs to the compose tab to create a new message.

Appointments

This displays both upcoming and past appointments for the patient. They can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

Welcome to us pr	act/cell/		
	un Antines Municipality Cont	an it may take up to 14 know for	
reflected on this page.	ris ration rangement syst	ent it may take up to 24 mores for	any changes in an
	1		
Upcoming Appointmen	ts		
Na records available.			
Appointment History			
F Appeliers white			
Almix Appointment 3d	Pakavit	Appointment Date 4	Ristwi
	Ann Bahrt	63/13/2013 09:15:00	Pending
8392547		05/16/2011 09:20:00	Pending
8392547 171	Stocey Berkewitz	the second se	
8392847 171 3158726	Stocey Berkewitz Stocey Berkewitz	05/16/3011 09:30:00	Pending
8392547 171 3158726 3158725	Stacey Berkewitz Stacey Berkewitz Stacey Berkewitz	05/16/3011 09:30:00 05/14/2011 09:00:00	Pending

Financial

This section is governed by the bLink Pro services enabled by the practice in ANDI.

			Welcome Tim log
			Advanced Orthodoxtust Demo 2565 Altuvial Avenue, Suite 102 Atlanca, GA 30338
A-1	Conternation of the second sec	- <u>S</u>	
Contract Info	EPopulation Online Payment Hoto	*	
Na records available.			
Make a Paymer	t		
Patient * Meissa Anderson			
- Account Holder Inf	ormation		
First Name *	Mode initial Last Note *	(Rober	r name as it appears on card)
Address 1 4	Anderson Address 3		
834 Millepod			
Sity *	Nate/Produce* Fo*	Those Number #	
Arterta	CA 30313		
Payment Op Ocida Cara () O	tions eck - Credit Carit information	Expration	Payment
Payment Type Weat a	Credit Card Number* COV*	Dop (MM/WY).*	Payment Amount *
VISA 🈂 -	1		8
			MAKE PATHENT CANCEL
			2

Patients are able to **view their financial details, make an online payment and view their online payment history** (if these features are enabled by the practice).

Each Practice Management Software and Payment Processor varies on the details displayed. Contact Solutions by Design for specific information pertaining to your Practice Management and Payment Processor.



Feedback

Patients are able to submit an anonymous survey regarding the practice overall as well as their latest visit using a scale system ranging from Extremely Poor to Excellent.

Note: the survey consists of 10 standardized questions. We plan to add customizable survey in a future update.

stient Survey				
2. Now would you rat	to the overall level	of patient i	ervice that you re	ceived at our office?
Estremely Peer	Below Average	Average	Above Average	Excellent
2. How would you rat	to the Ariandiness	of our staff	at your last stuit?	
Extremely Poor	Balaw Average	Average	Above Average	Excellent
3. New would you rat	to the time that as	r stall spen	t with you explain	ing our policies and procedures?
Extremely Poer	Seleve Average	Average	Abeve Average	Excellent
4. How would you rat	to the clarity in wi	tich clinical	information was d	incusted with you?
Extremely Poer	Below Average	Average	Above Average	Excellent
5. Was the administr	stive information	that was pre	searched to you well	uable and informative?
Entremely Poor	Sciew Average	Average	Abeve Average	Excellent
s. Were we punctual	In seeing you at y	our appoint	ment?	
Estremely Poer	Below Average	Average	Above Average	Excellent
7. Was our office stee	an and organized a	t your visit		
Estrenely Poor	Bulaw Average	Average	Abeve Average	Excellent
8. New would you rat	le your comfart le	rel during tr	estment procedur	ne?
Extremely Poor	Below Average	Average	Abeve Average	Excellent
9. Was the doctor cle		explaining a	a procedures?	
Extremely Peer	Below Average	Average	Above Average	Excellent
10. Is our technology	such as online app	aintment re	minders importan	f An you?
Extremely Poer	Below Average	Average	Above Average	Excellent

Account Settings

Patients have control over their notifications settings and can override the practice's default settings to better fit their communication needs. Patients can change their bLink Pro login password. This does not effect any other password associated with your practice and is not recorded in ANDI or your PMS.

Email Notifications

Patients can review what email address are currently being used for bLink Pro notifications. They can edit, remove and add additional contacts.

√ Welcome ™	our practice//					
-						
Icourt Suttings Er	ail NotiFications	Test Neway	e NellBostione			
Setup your catal	reminders per j	patient hore. Ch	the Add Con	tott" Button/te libe	right of	the provent
-		100,000,000	2221220			
Ann Bahrt						Add Contest
Ecosil Address 1	Confirmation	2" Acceler	$\mathcal{I}^{*t}Reminder$	Droit Non-Apply		
ansiablicensil.com	(A)	30 days prior	4 days prior		1.648	(Annexe)
DSGAJANGAN	*	1 day prior	*	- 390	(All	(Assessed)
Jill Berkowitz						Add Custout
Email Address +	Confirmation.	1 ⁴ Benindsr	2 ⁴⁴ Associator	Overit Man Augsta		
JII@123email.com		2 days prior	I slay price	- 4	D.H.	Arrive
Stacey Berkowitz						Ant Contact
Ernal Address a	Castornatio	ar pr	ges Reminder	Outsil Roc-Apple		
stacey@133email.com	1	7 days prid	1 day prior		- 6	Ant.
Gillian Berkowitz						Add Control
Ernal Address >	Confirmation	a d ^{ar} Remission	2 ²⁰ Reminder	Great West-Apple		
						and in the second second

Select the patlent the email address pertains to, enter the new email address and select when they want to receive the different notifications.

Note: the Appt. Confirmation is the initial appointment email that is normally sent when an appointment is added to your PMS.

By checking the "I only wish to receive appointment reminders" box, all other bLink Pro notifications such as Birthday, No Show, Financial, Mass Email, etc. will NOT be sent this email address.

Text Message Notifications

Patients can review what cell phone number are currently being used for bLink Pro notifications. They can edit, remove and add additional contacts.

Welcon	TO to or practice					
		-				
covered Settings	Email Metilice	fant Past Nes	wege NetThiation	•		
Setup your name) to a	SMS reminders p	er patient here. Shat you want to	Click the "Add Co be notified.	etzet' buttoe('to the	right at	the patient
un Bahrt						And Contant
Coll Mover -	Confirmation	1" Bercheine	2 nd Aumindur	Ond Non-Apple	_	
1354653845	*	×	L day preer	4	.ent	(manuter)
1305468		*	*		(nit)	(Antore)
2246883232		2 ways prior	*	2	ent	(Remove)
III Berkowitz	ř.					All Contact
Coll Please 1	Confirmation	2" Barninder	2 nd Raminder	Grait Nan-Appte		
3326848320		6 days prior	1 day prior	4	1,858	(Anneve)
3254654132	- ÷.	7 days prior	1 day prior	*	210	Remain
Racey Berko	witz					Add Contact
Coll Please 1	Configuration	3" Anninder	2" Auminiur	Chait Mon-Apple		
6385354600			1 day prior	*	10.005	(manners)
Sällan Berkov	vitz					Add Cardan?
Col./Nane 1	Continuation	1" Receiver	2" Anninder	Cinit Non-Appta		
			1		I Canada	and the second second

Select the patient the cell phone number pertains to, enter the new number and select when they want to receive the different notifications. Remember to include the area code.

By checking the "I only wish to receive appointment reminders" box, all other bLink Pro notifications such as Birthday and Financial will NOT be sent this cell phone number.

COMING SOON: ETOONS MODULE

We are developing a series of animated cartoon videos which can take the place of traditional messages.

Ask your sales rep for information and availability.

