Wired Client Users' Guide V1.4

Practice Perfect Integration Edition

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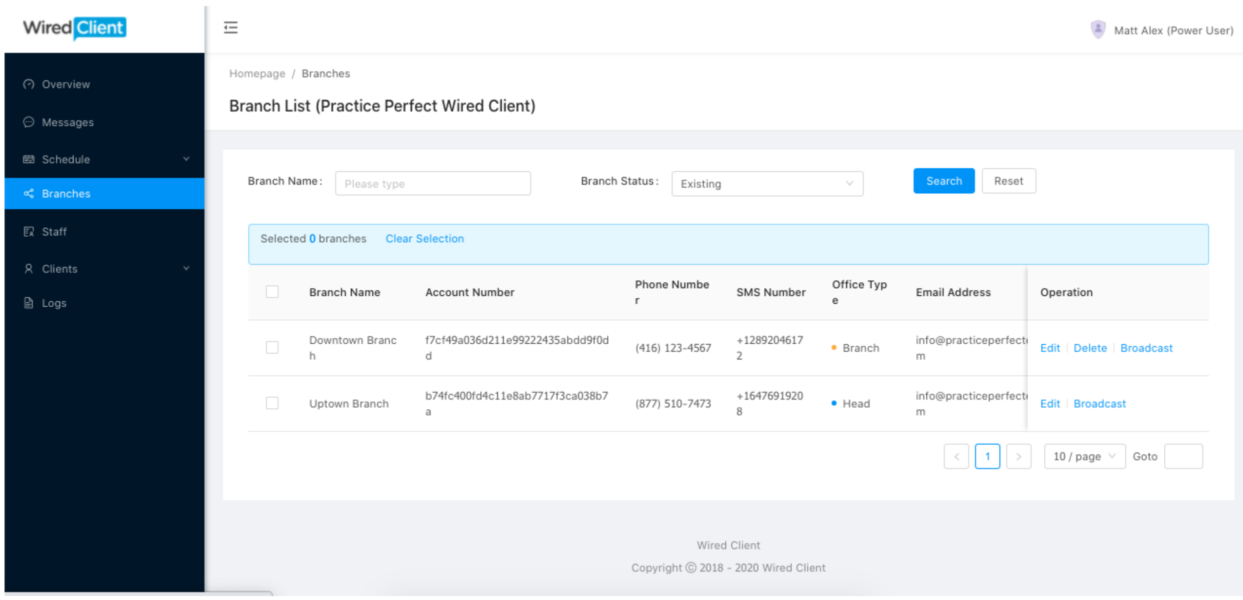
1. Branches

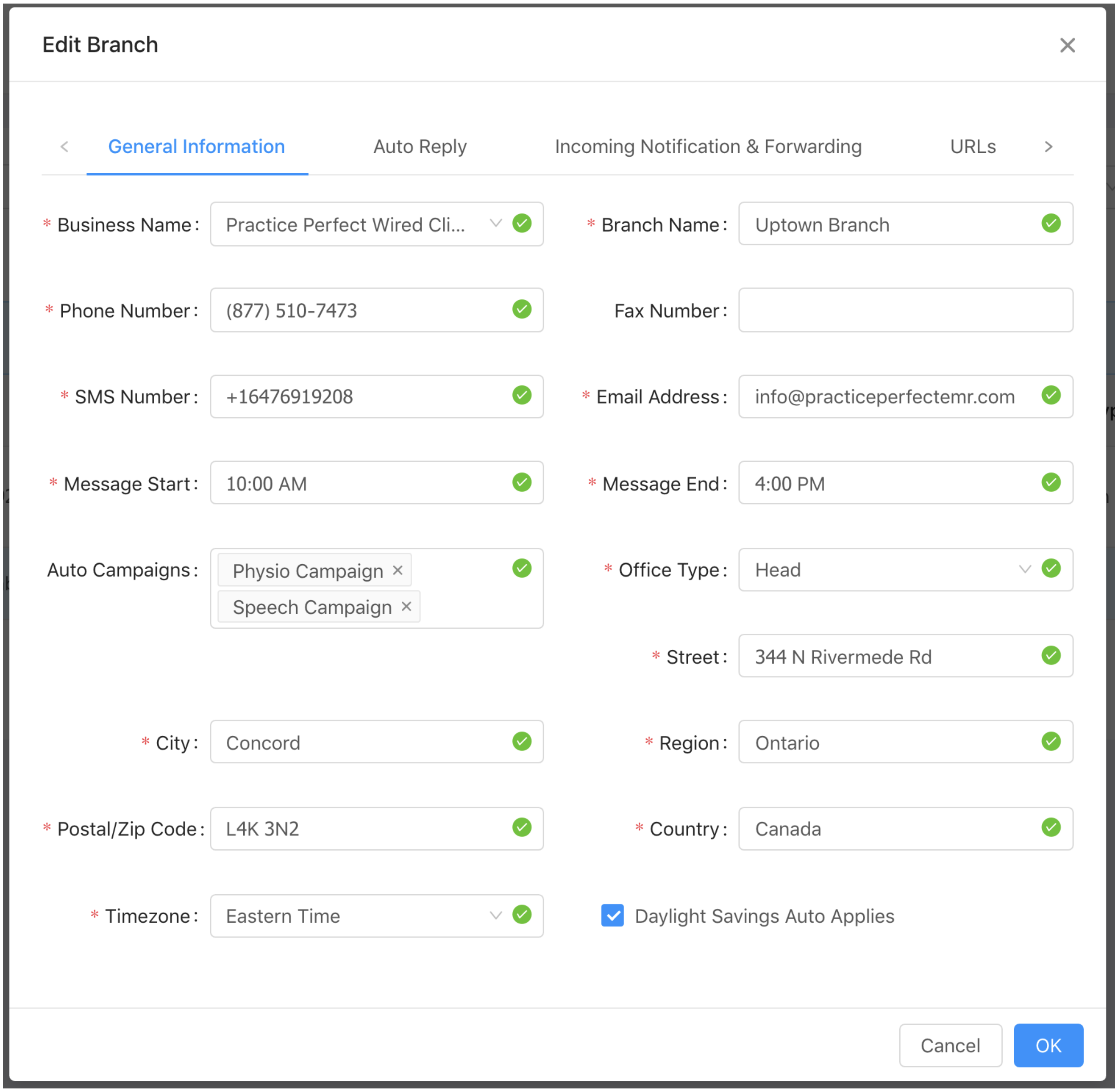
What is a **Branch**? Branches represent the individual office locations belonging to your clinic. They are created by Wired Client administrators.



Click **Edit** to view the **Branch** settings. The settings are divided into three tabs; **General Information**, **Auto Reply**, and **Incoming Notifications & Forwarding**:

1.1. General Information

The **General Information** tab houses all of your facility's basic contact information, as well as some other key fields for setup.



The fields work as follows:

- **Business Name:** The name of your organization, as entered by the Wired Client team when creating your account.
- **Branch Name:** The name of the individual office location.
- **Phone Number:** The facility's phone number.
- **Fax Number:** The facility's fax number.

- **SMS Number:** A local area phone number provided by the Wired Client team. This is the phone number from which your messages are sent. When a client sends a message to this number, it can be viewed in Wired Client.

  Note: This phone number *should not* be changed under any circumstances unless advised by a member of the Wired Client team. Any changes to this number will result in a failure to send and receive messages.

- **Email Address:** The facility's general email inbox. This is also a destination for the **Incoming Notifications & Forwarding** emails.

- **Message Start:** Automated messages can be sent at the **Start of the Day**. The time entered here will be regarded as the **Start of the Day**.

- **Message End:** Automated messages can be sent at the **End of the Day**. The time entered here will be regarded as the **End of the Day**.

- **Auto Campaigns:** Auto Campaigns allow you to automatically apply and enable **Campaigns** to clients who are uploaded to Wired Client via the API. Once a Campaign has been applied to a client, they will begin receiving the messages therein automatically.

- **Office Type:** Mark whether this **Branch** is either the **Head** office or a **Branch**.

- **Street:** The facility's street address.

- **City:** The city in which the Branch is located.

- **Region:** The province or state in which the **Branch** is located.

- **Postal/Zip Code:** The postal or ZIP code in which the Branch is Located.

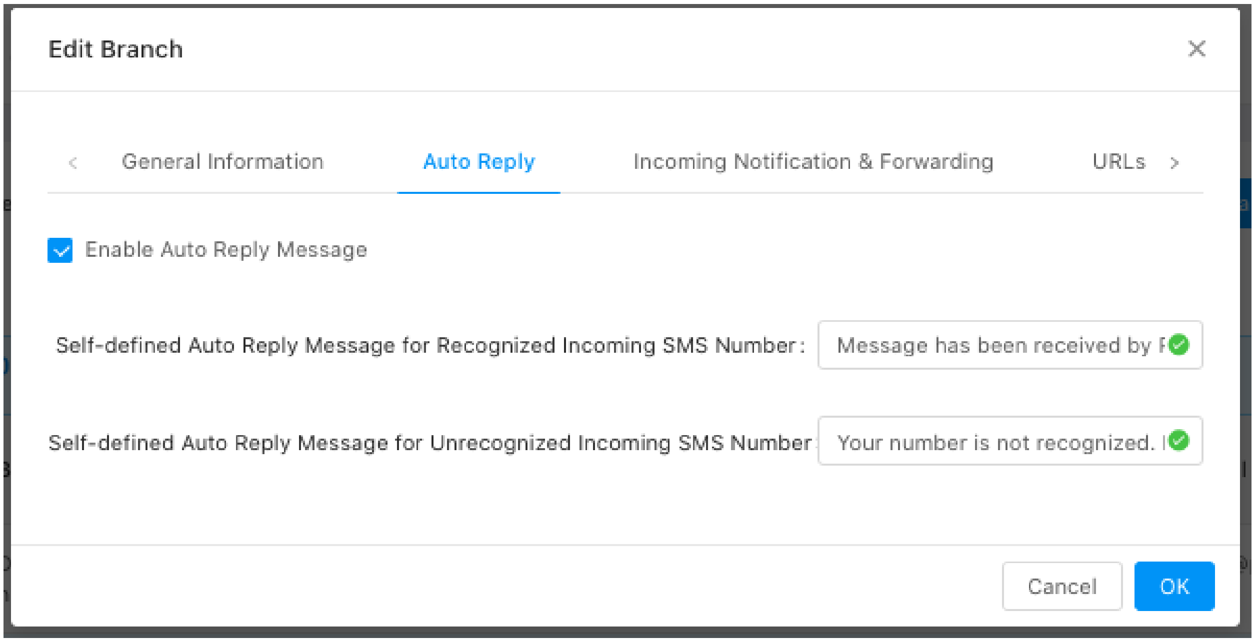
- **Country:** The country in which the Branch is located.

- **Timezone:** The timezone in which the Branch is located. This ensures that the Message Start and Message End time reference the Branch's local time.

  If applicable, the user may uncheck **Daylight Savings Auto Applies** if they reside in a region which does not adhere to daylight savings time. It will be checked off by default.

1.2. **Auto Reply**

Wired Client can automatically send a reply to a client when an incoming message is received. These settings can be adjusted in the **Auto Reply** tab of the **Branch** settings.



The fields work as follows:

- **Enable Auto Reply Message:** If this box is checked, every client who replies to a message will automatically receive a response.

  If this box is left unchecked, then an **Auto Reply** will not be sent.

  Note: Each **Auto Reply** counts towards your monthly text message segment allowance.

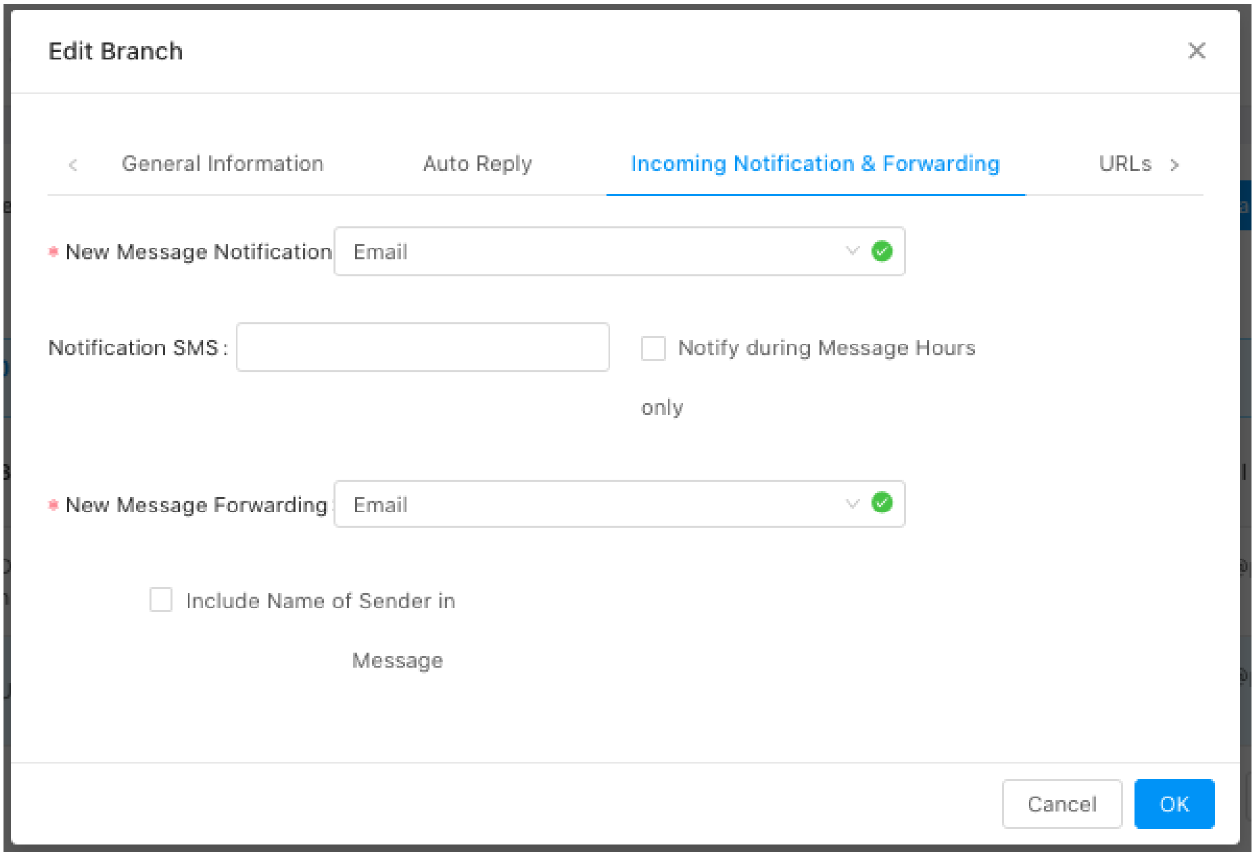
- **Self-defined Auto Reply Message for Recognized Incoming SMS Number**: Enter a custom **Auto Reply**. Clients who have an existing Wired Client profile will receive this message when they send your facility a text.

- **Self-defined Auto Reply Message for Unrecognized Incoming SMS Number**: Enter a custom **Auto Reply** for individuals who do not have an existing profile in Wired Client. If the phone number from which the message is sent is not associated with an existing profile in Wired Client, this **Auto Reply** will be sent instead.

1.3. Incoming Notifications & Forwarding

You're able to receive an email, text message, or both, notifying you of incoming messages from clients. These notifications can be enabled or disabled in the **Incoming Notifications & Forwarding** panel of the **Branch** settings.

The email address to which the notifications are sent are: 1) the **Email Address** entered in the General Information tab and 2) the **Email Address** of any ***Enabled*** **Staff Accounts** who have checked off **Receive Notifications** within their Staff Profile, and who work at this branch.



- **New Message Notification**: You may choose to be notified of incoming messages by email, SMS, or both.

  The **New Message Notification** is sent on an hourly basis. For example, if a client replies to a message at 12:30 pm, you will not be notified until 1:00 pm. The notification does not include the content of the message.

- **Notification SMS:** If you chose to be notified by SMS, you will need to enter a cell phone number here.

- **New Message Forwarding:** Like the New Message Notification, you can choose to be notified of incoming messages by email, SMS, or both.

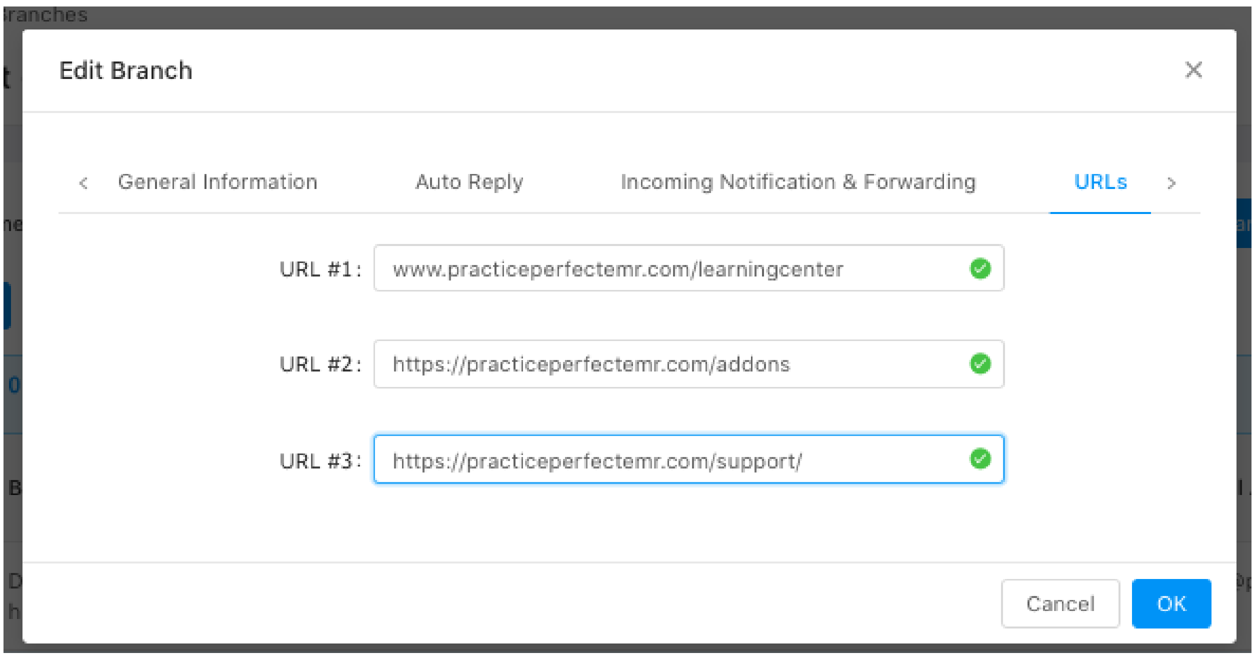
  The **New Message Forwarding** feature sends you a notification in real time. The moment a client replies to a message, you will receive a notification. In addition, these notifications include the content of the received message.

- **Include Name of Sender in Message:** You may include the sender's name in the **New Message Notifications** and **New Message Forwarding** emails and text messages. If this box is unchecked, their phone number will appear instead of the sender's name.

- **Notify During Message Hours Only:** If this box is checked, notifications will only be sent between the **Message Start** and the **Message End** time entered in the **General Information** tab.

1.4 URLs

The URLs tab provides **Branches** with a place to store links to various web pages. These URL #1, URL #2, and URL #3 can be automatically populated in Message Templates when using the corresponding Token.

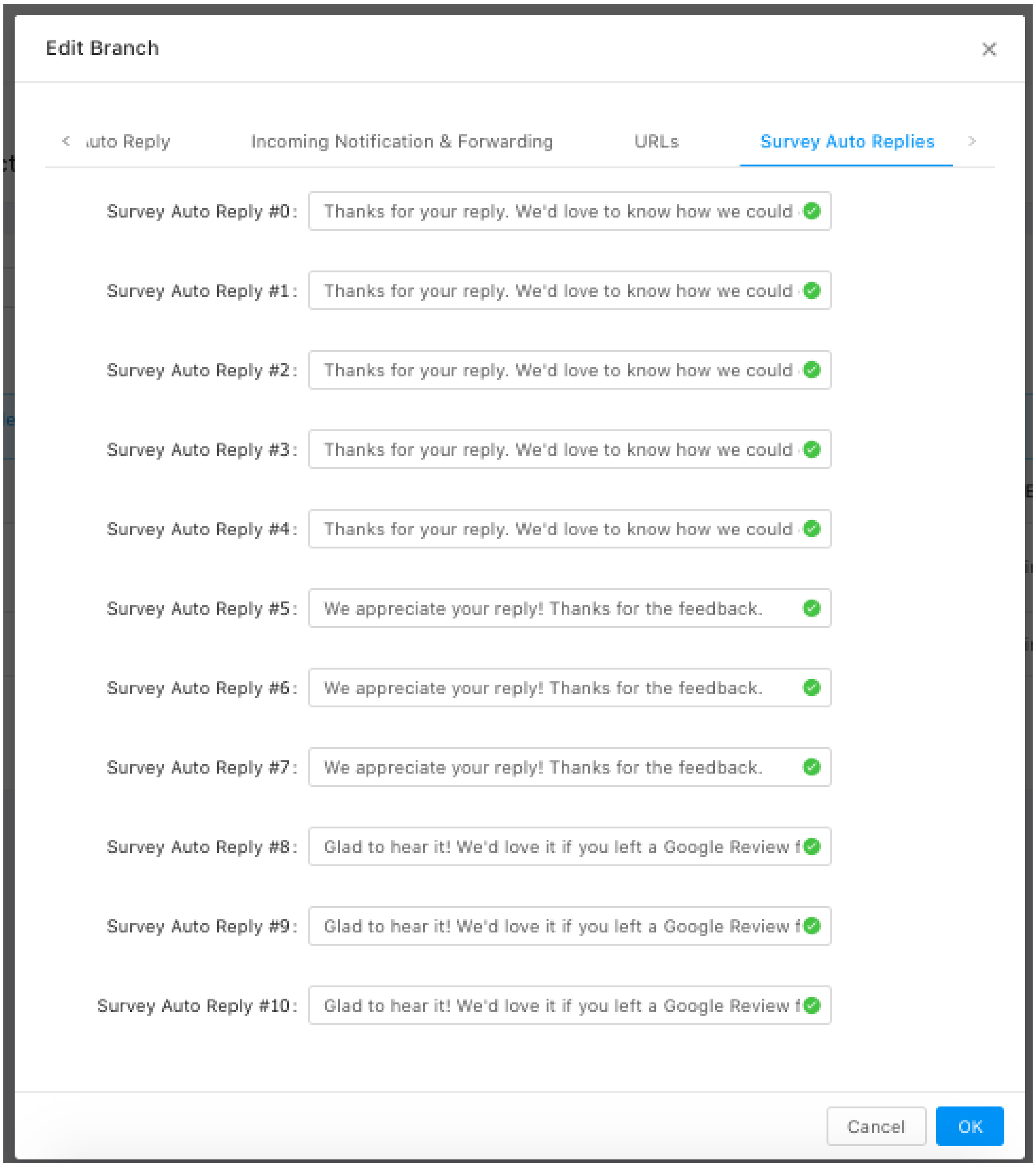


Note: The URLs tab is most relevant for businesses with multiple locations, where the links vary from Branch to Branch.

1.5 Survey Auto Replies

Wired Client offers the ability to send Net Promoter Score (NPS) surveys to clients. An example of a NPS survey would be: *On a scale of 1 to 10, how likely are you to recommend our clinic to a friend or family member?*

Depending on the response of the client, they can receive a customized response, as seen below.



The responses from the clients are recorded in the **Overview.** This is discussed further in section 8.3.

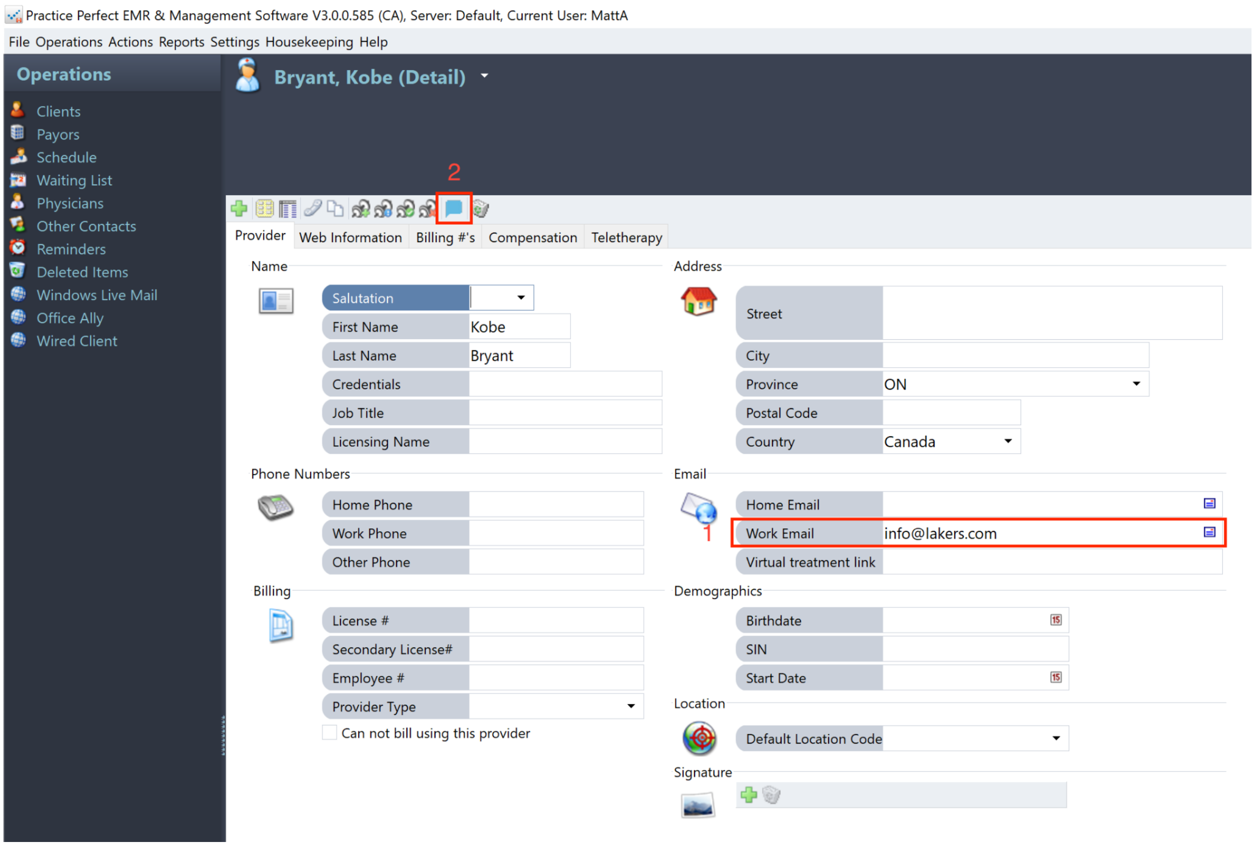
2. Staff

Staff accounts represent the individuals working at your facility. Whether they are therapists or admin, each staff member may receive their own Staff Account.

There are two ways to create a Staff Account: 1) create the account via the Practice Perfect API, or 2) manually create a staff account in Wired Client.

2.1. Creating Staff Accounts via API

Creating Staff Accounts via the API is a very simple process. To begin, select *Housekeeping>Contacts>Providers.* Double-click a Provider's profile to reveal the Detail View.

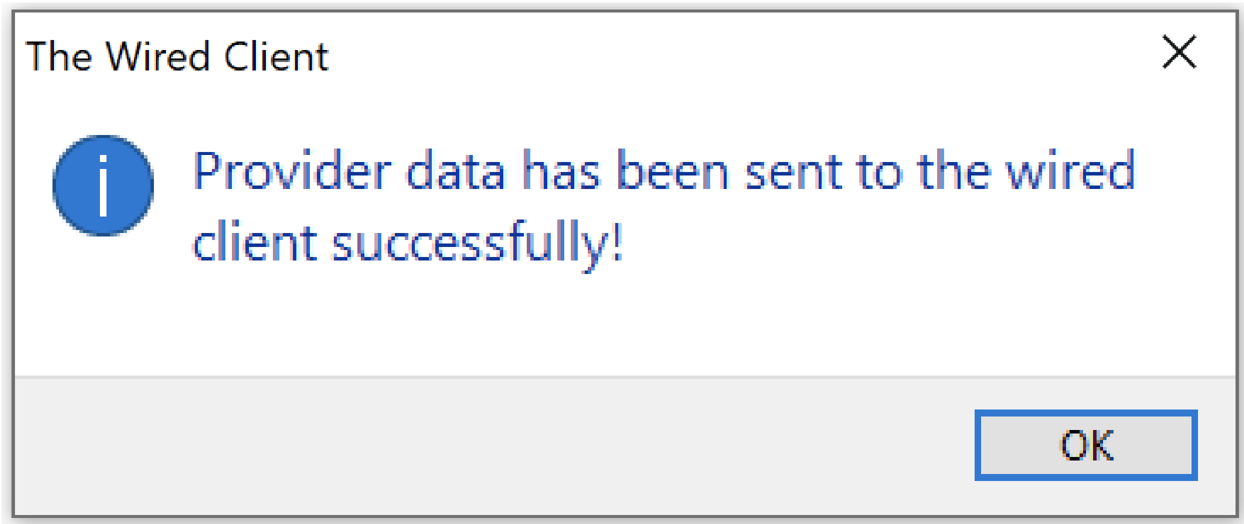


There are two things which must be done for a Provider's profile to be uploaded to Wired Client:

1) You must ensure that the Provider has a **Work Email**. For example, if the Provider does not have a personal Work Email, you may use the general inbox for your facility (i.e. [info@yourclinic.com)](mailto:info@yourclinic.com).

2) Click the **Wired Client Button** on the **Function Bar** to send the provider's data to Wired Client.

Upon sending the Provider data to Wired Client for the first time, the following dialogue box will appear.



Please note that a **Provider's Staff Account** must be **Enabled** in Wired Client (discussed in Section 2.4) before they are able to login. Furthermore, none of the information entered in their **Provider Profile** (in Practice Perfect) or their **Staff Account** (in Wired Client) will be shared with your clients. It is for internal purposes only.

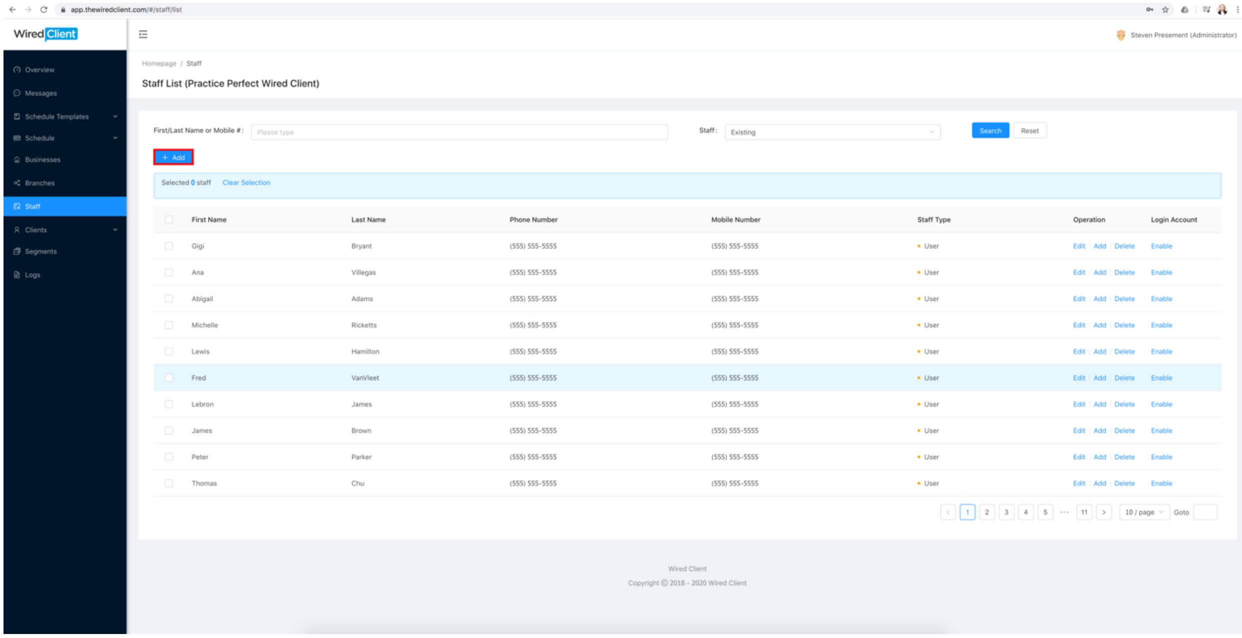
The main reason for creating **Staff Accounts** for your Providers is so that their name can be included in messages. For example, if you want to include the name of the Provider by whom the client will be treated, their **Provider Profile** must be uploaded to Wired Client from Practice Perfect. They cannot be created in Wired Client exclusively, otherwise their Practice Perfect **Provider Profile** (i.e. their schedule) and their Wired Client **Staff Account** will not be synced.

In addition, users may send a Broadcast based on the staff member with whom the clients are scheduled. For example, if a staff member is taking a sick day, you may want to send a Broadcast to all of the clients with whom they're scheduled.

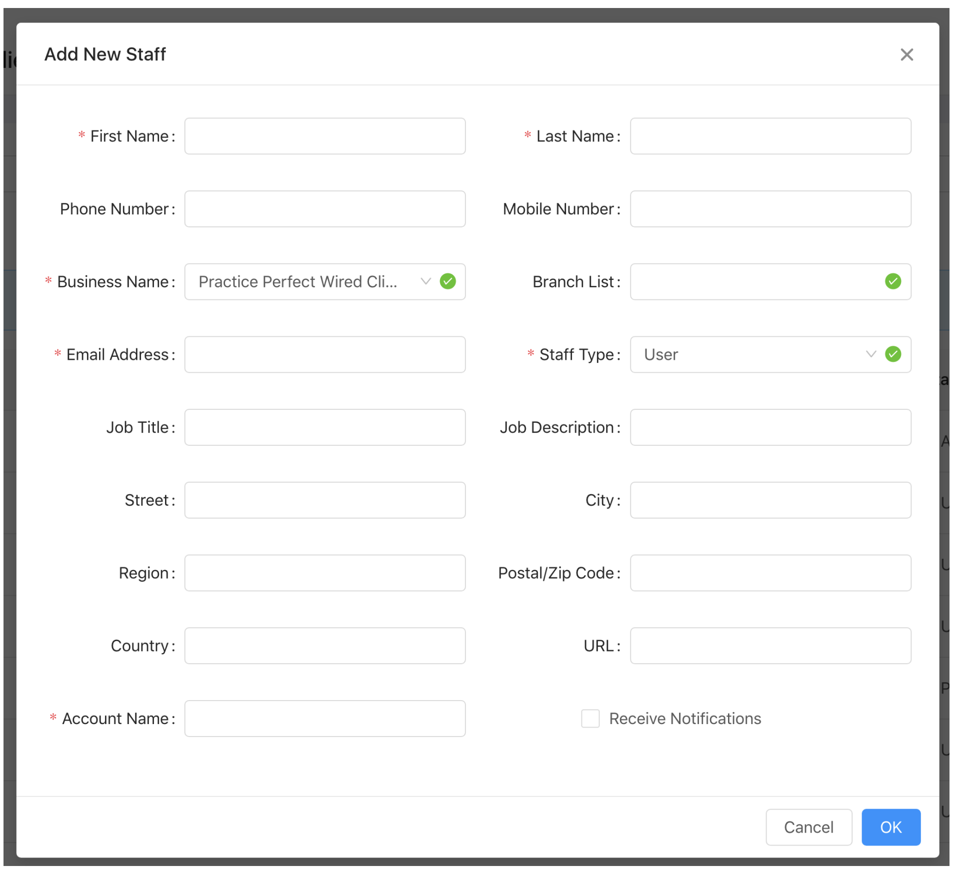
2.2. Creating Staff Accounts in Wired Client

Staff Accounts for admin and non-therapist staff should be created in Wired Client. You do not need to create a Provider Profile for them in Practice Perfect.

To create a **Staff Account** in Wired Client, click the **Add** button highlighted in the screenshot below:



The following screen will appear:



The fields work as follows:

- **First Name:** Enter the staff member's first name.

- **Last Name:** Enter the staff member's last name.

- **Phone Number:** You may enter the company phone number.

- **Mobile Number:** You may enter their personal mobile number. This is not shared with clients, and is only relevant to the **Incoming Notification and Forwarding** settings.

- **Business Name:** Pre-populated with the name of the business.

- **Branch List:** Enter the branches at which the staff member works.

- **Email Address:** Enter the staff member's work email.

- **Staff Type:** Choose a Staff Type. Each Staff Type has its own set of permissions. Descriptions of these Staff Types can be found in Section 2.3.

Note: A client is considered to be the staff member's 'Own Client' if they are listed as their Primary Provider in Practice Perfect.

- **Job Title:** You may enter the staff member's title.

- **Job Description:** You may enter a brief description of their role.

- **Street:** You may enter their home address.

- **City:** You may enter the city in which they live.

- **Region:** You may enter the province in which they live.

- **Postal/Zip Code:** You may enter their postal/zip code.

- **Country:** You may enter the country in which they live.

- **Account Name:** This will become the staff member's username for logging in.

- **URL:** You may store a URL within the staff member's profile which can be auto-populated in Message Templates (e.g. a meeting link).

- **Receive Notifications:** This user will receive email notifications when a client with whom they have permission to speak replies to a text.

Note: A red asterisk indicates that it is a required field.

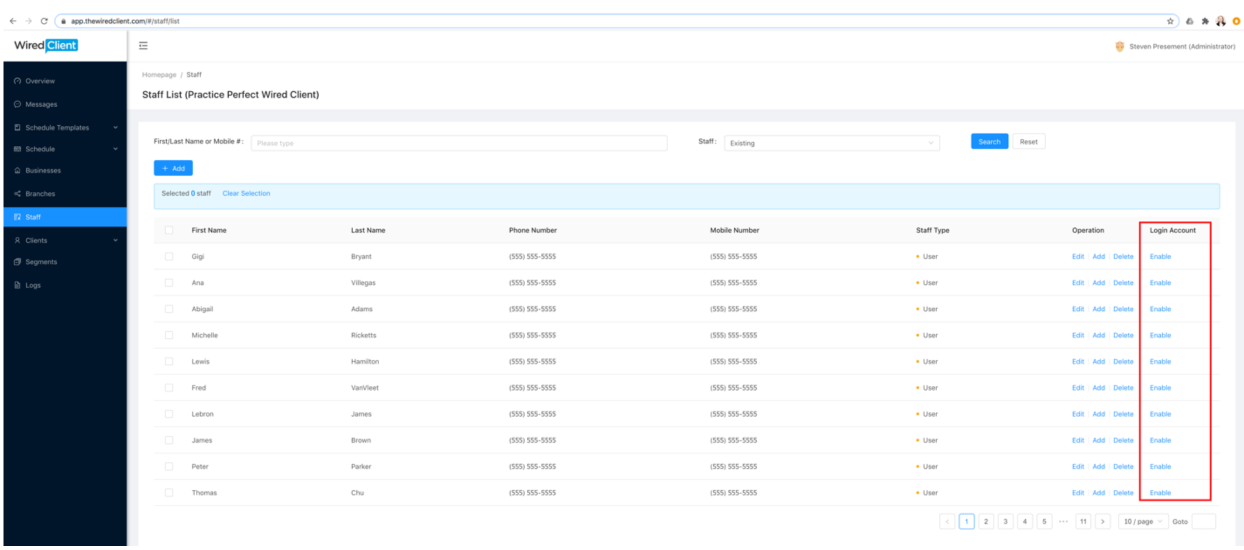
2.3. Staff Types and Permissions

In Wired Client, each Staff Type has its own set of permissions. These permissions are only relevant to **Enabled Staff Accounts**.

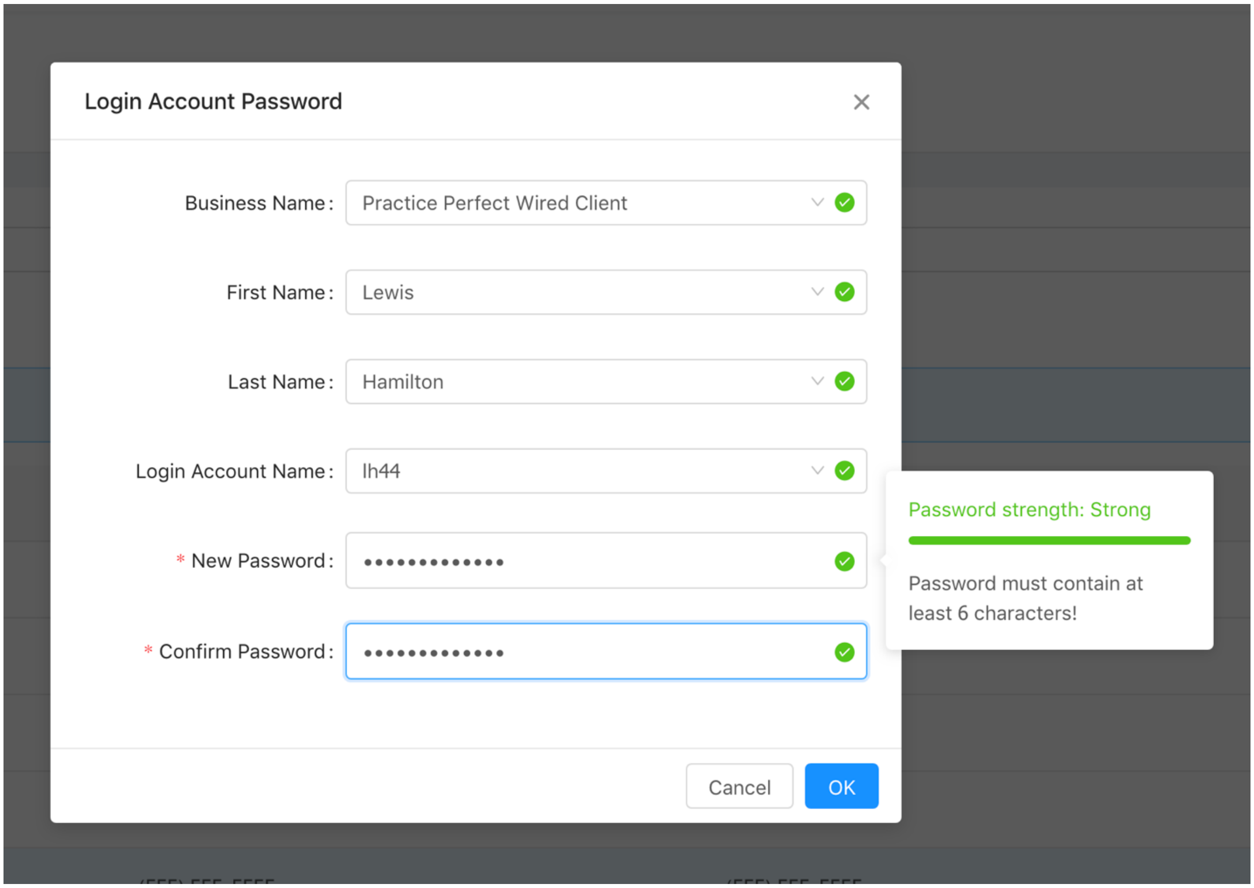
Staff Type	Can View All Clients	Can Only Message Own Clients	Can Message All Clients	Can Edit All Settings
User	X	X		
User – Own Clients Only		X		
Coordinator	X		X	
Power User	X		X	X

2.4. Enabling Staff Accounts

A Staff Account must be **Enabled** before a user can login with it. Take note of the **Login Account** Column highlighted below:



Click **Enable** to activate the Staff Account. The following panel will appear:



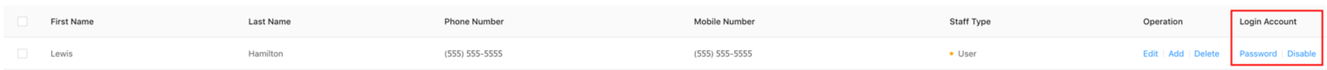
The fields work as follows:

- **Business Name:** Automatically populated with the name of your business.
- **First Name:** Automatically populated with the staff member's first name.
- **Last Name:** Automatically populated with the staff member's last name.
- **Login Account Name:** The **Account Name** entered while setting up this Staff Profile. The Login Account Name becomes their username for logging in.
- **New Password** and **Confirm Password**: Enter a password for this new Staff Account. The password is case sensitive.

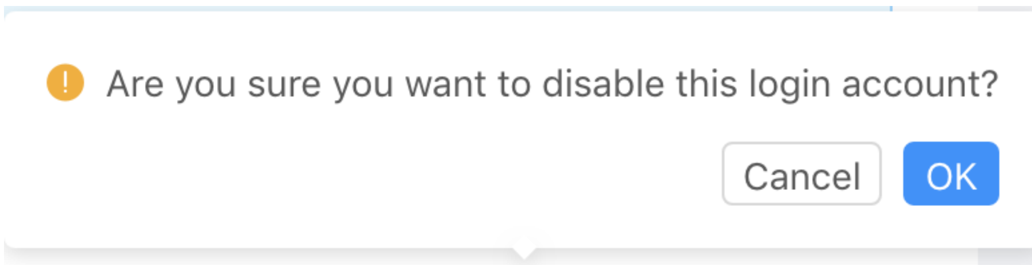
Click **OK** to Enable this Staff Account.

2.5. Disabling Staff Accounts

Disabling a Staff Account and preventing a user from logging in to Wired Client can be done in a similar fashion to Enabling the account. Take note of how the options in the Login Account column change for an Enabled Staff Account:



Click **Disable**. The following panel will appear:

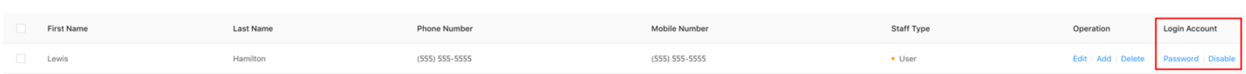


Click OK to confirm your selection and Disable the Staff Account, preventing this user from logging in.

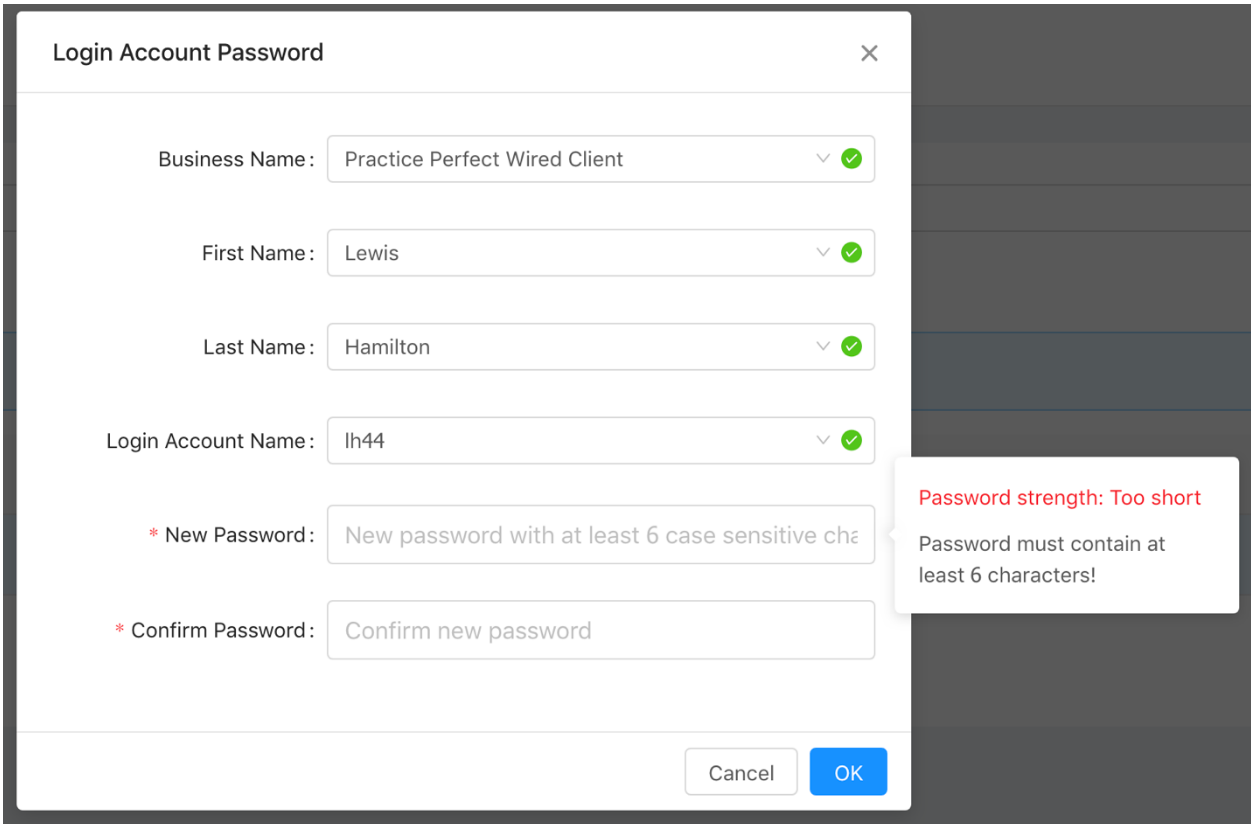
2.6. Updating or Changing Passwords

Should a user wish to update or change the password for an Enabled Staff Account, they may do so one of two ways.

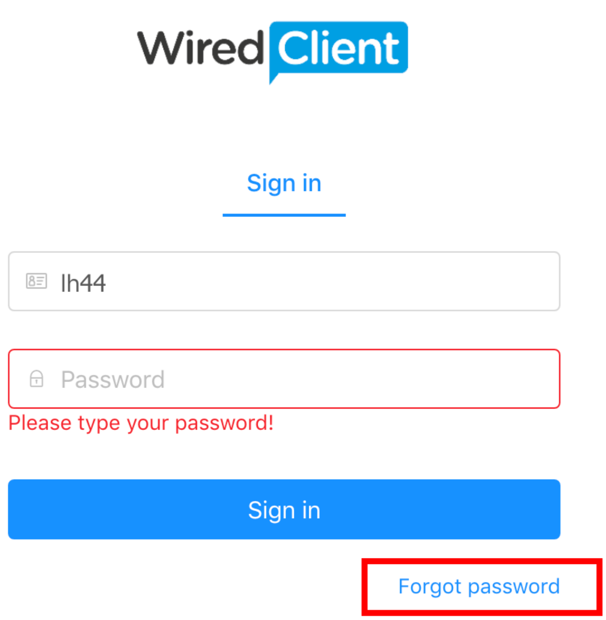
On the **Staff** page, in the Login Account column, the **Password** button will appear beside any Enabled Staff Accounts.



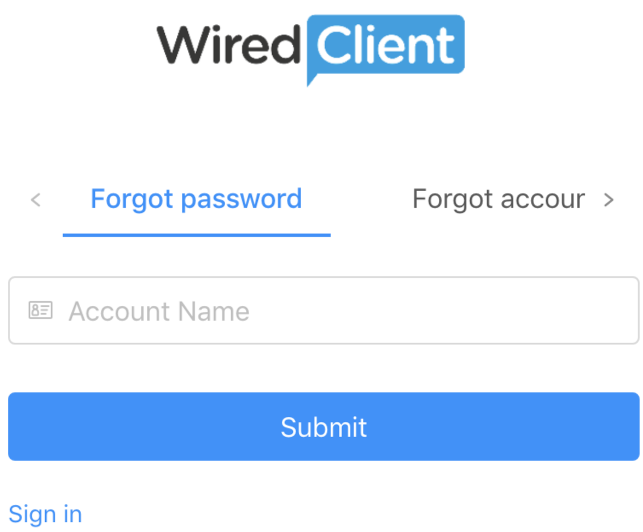
Click **Password** to reveal the following panel and update Password for this Staff Account:



The second way to update a Password is by using the **Forgot password** function on the Wired Client **Sign in** page.



A user may enter their **Account Name** and press **Submit**. Upon doing so, they will receive an email containing a link which they may use to reset their password.



In the event that the user does not recall their Account Name, they can use the **Forgot account name** function. This requires them to enter the email address associated with their account. And when they press Submit, they will receive an email containing the Account Name(s) associated with this email address. They may then use the Account Name to sign in, or use it with the Forgot password function to reset their password.

3. Clients

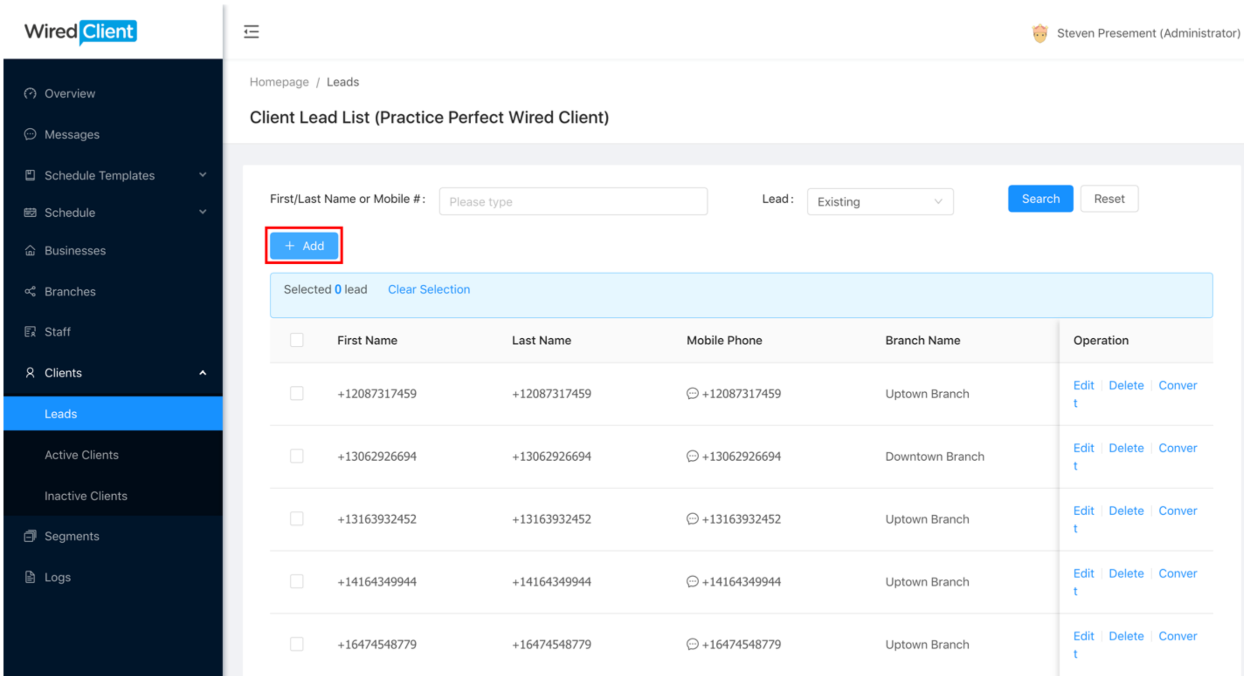
Clients represent the potential, existing, and past clients of your facility. All of which are able to receive messages through Wired Client. The Clients are divided into three categories, as follows:

3.1. Leads

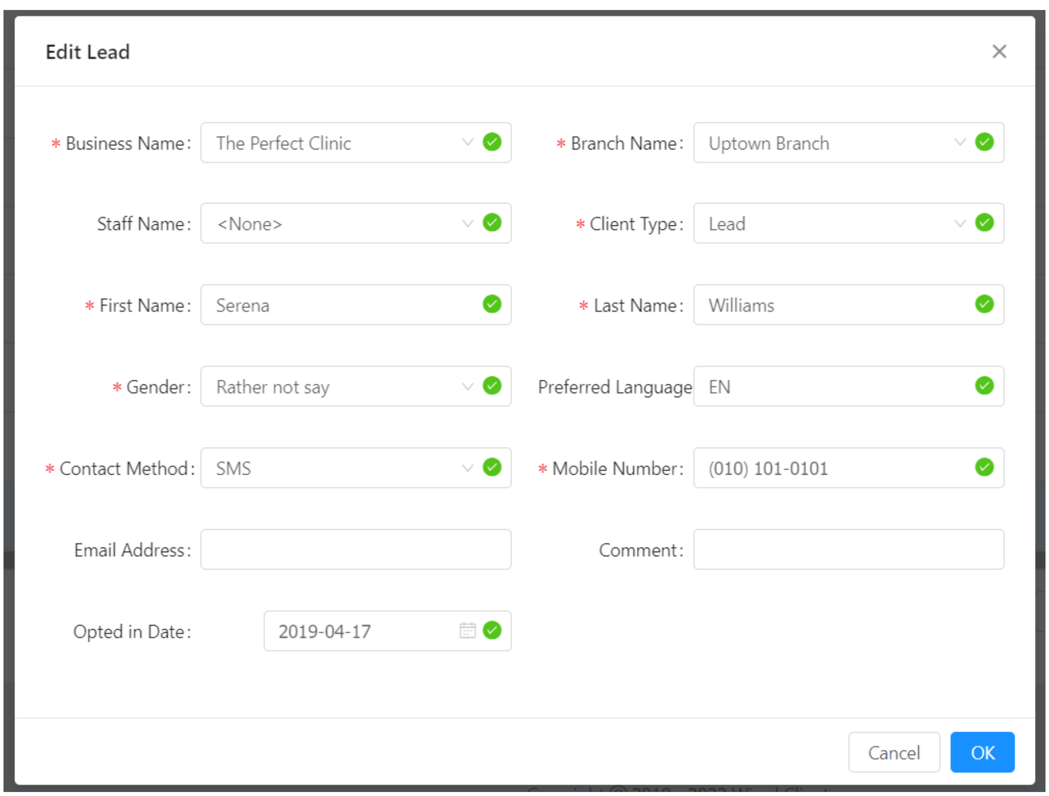
Leads represent the potential clients who have yet to schedule an appointment at your facility. A Lead may be a physician referral, a word of mouth referral, or perhaps someone you met at an open house or workshop. A Lead profile can be created in one of two ways:

1) Manually Created Leads

A Lead profile can be created manually by pressing the **Add** button.



The following panel will appear:



The fields work as follows:

- **Business Name:** Automatically populated with the name of your business. This field cannot be modified.

- **Branch Name:** Choose the Branch at which this potential client is most likely to be seen. This is a required field.

- **Staff Name:** You may assign a Staff Member to this client.

- **Client Type:** Will default to Lead. It may be changed to an Active Client or an Inactive Client upon creation of the profile.

- **First Name:** Enter the client's first name. This is a required field.

- **Last Name:** Enter the client's last name. This is a required field.

- **Gender:** Enter the client's gender, if necessary. Gender will default to 'Rather not say'.
- **Preferred Language:** Choose the client's Preferred Language. This field will default to English (EN). Other languages currently supported include Spanish (ES) and French (FR).

  Wired Client will send the corresponding version of the Message Template to the client based on their Preferred Language.

- **Mobile Number:** Enter the client's mobile number. This number will be used for all SMS communications with the client. Please note that Wired Client is not capable of delivering messages to landlines. This is a required field.

- **Email Address:** Enter the client's email address.

- **Comment:** Make any notes about this particular Lead. This is kept internally and will not be shared with the client.

- **Opted In Date**: This date will be automatically populated with the date on which the profile was created. This date can be used to schedule automated messages, as discussed in section 5.3.

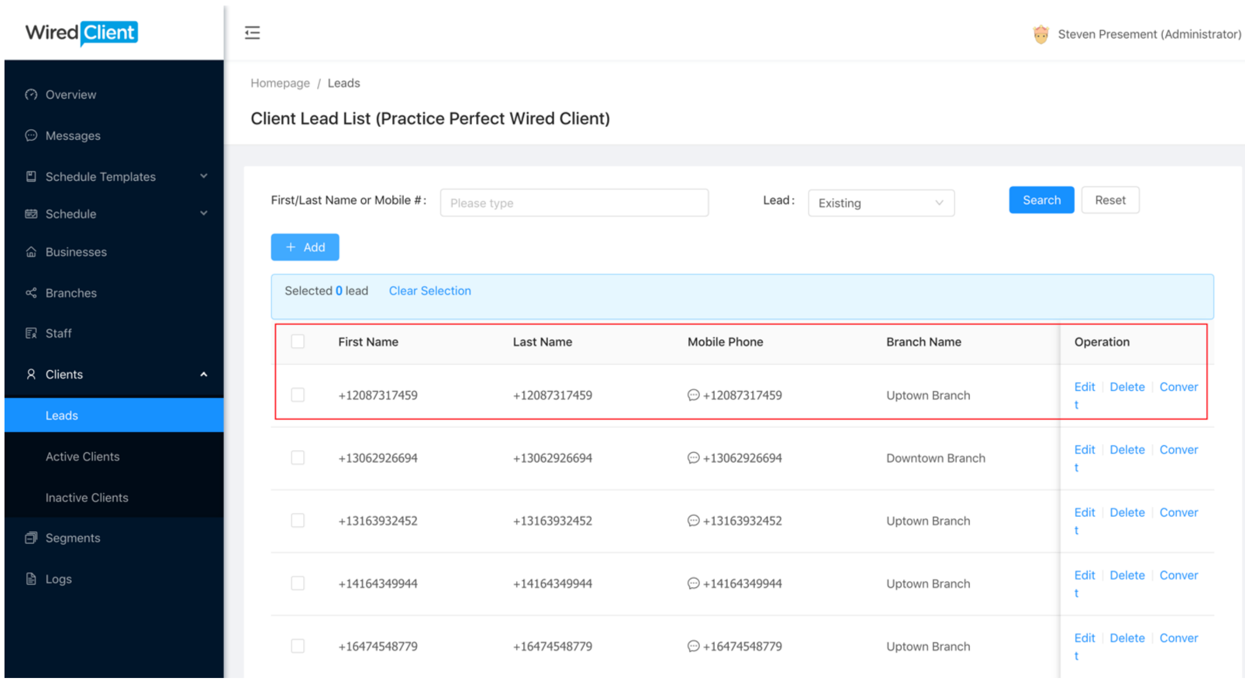
Note: A red asterisk indicates that it is a required field.

2) **Automatically Created Leads**

Leads are created automatically when an individual sends a text message to your **SMS Number**, but they do not have an existing profile. When there is not a **Client Profile** with a matching **Mobile Number**, a Lead profile is automatically created.

Because we have no other identifying information about the client, other than then phone number from which they messaged us, this number will be populated in the client's **First Name**, **Last Name**, and **Mobile Number**. They will automatically be associated with the **Branch** whose **SMS Number** they texted.

Upon collecting some more information about the client, you may click **Edit** to view their profile and enter the relevant details.

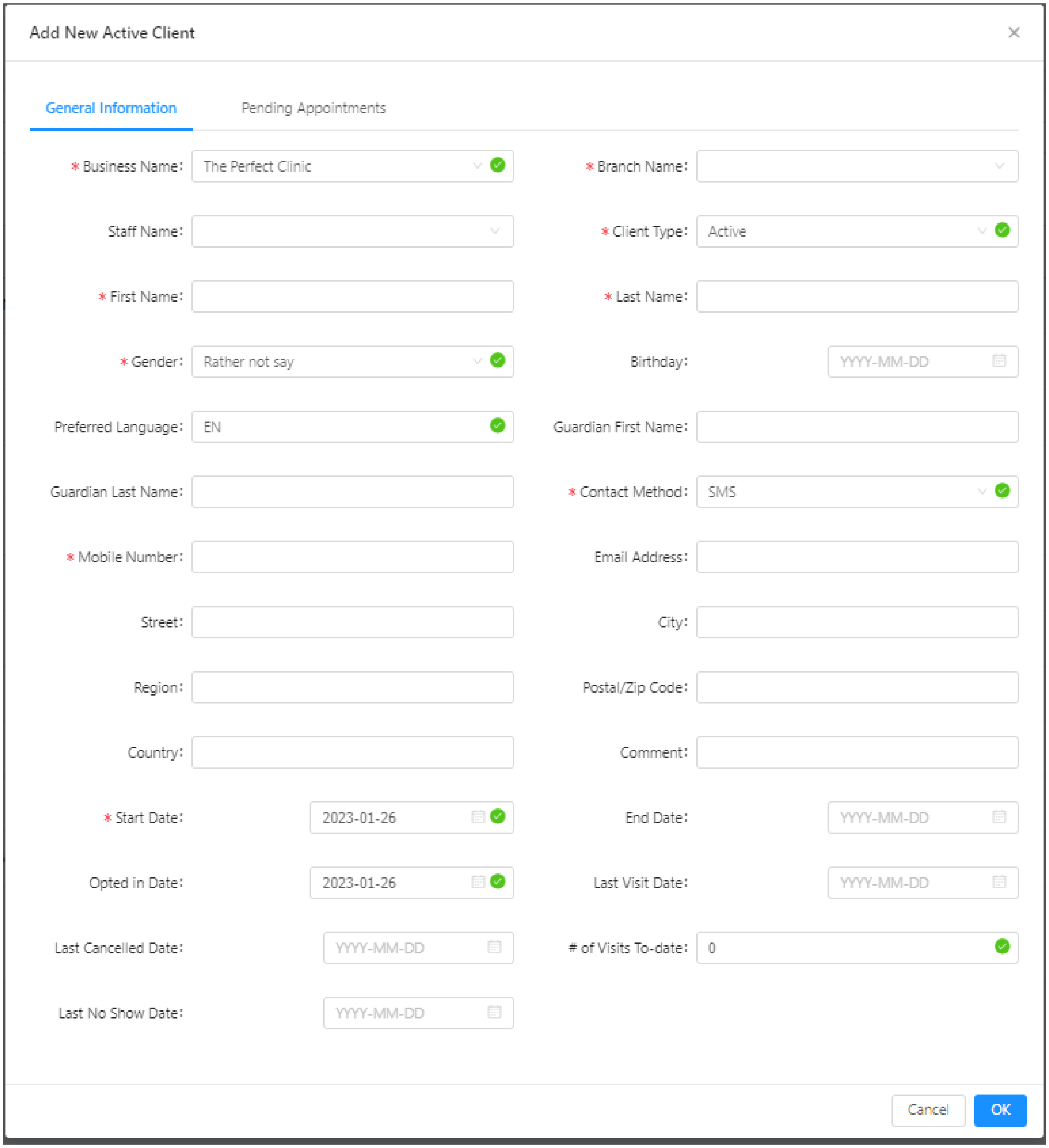


3.2. Active Clients

Active Clients are the clients currently attending your facility. An Active Client can be created one of two ways:

1) Manually Created

To manually create a Client Profile, press the 'Add' Button. The following panel will appear:



There are two tabs in the client profile: **General Information** and **Pending Appointments**. The fields in **General Information** work as follows:

- **Business Name:** The name of your business will be autofilled. This field cannot be modified.

- **Branch Name:** Select the Branch to which this client is assigned. This is a required field.

- **Staff Name:** Select the Staff Member to which this client is assigned.

- **Client Type:** Client can be categorized as either a Lead, Active Client, or Inactive Client. Client Types can be changed to and from at any time.

- **First Name:** Enter the client's first name. This is a required field.

- **Last Name:** Enter the client's last name. This is a required field.

- **Gender:** Enter the client's gender, if necessary. Gender will default to 'Rather not say'.

- **Birthday:** Enter the client's date of birth.

- **Preferred Language:** Choose the client's Preferred Language. This field will default to English (EN). Other languages currently supported include Spanish (ES) and French (FR).

  Wired Client will send the corresponding version of the Message Template to the client based on their Preferred Language.

  Note: If the client is uploaded from Practice Perfect, this field will be automatically populated with the Preferred Language entered in the Demographics tab. If the language is entered as either Spanish, Espanol, or ES, it will translate to ES in Wired Client. If the language is entered as French, Francais, or FR, it will be translated to FR in Wired Client.

- **Guardian First Name:** If this client has a guardian (i.e. a pediatric client), you may enter their first name.

- **Guardian Last Name:** If this client has a guardian (i.e. a pediatric client), you may enter their last name.

- **Contact Method:** Choose the means of contact for this client. Please note that only SMS is currently available.

- **Mobile Number:** Enter the client's mobile number. This number will be used for all SMS communications with the client. Please note that Wired Client is not capable of delivering messages to landlines. This is a required field.

- **Email Address:** Enter the client's email address.

- **Street:** Enter the client's street address.

- **City:** Enter the city in which this client resides.

- **Region:** Enter the province or state in which the client resides.

- **Postal Code/Zip Code:** Enter the postal/zip code of the area in which the client resides.

- **Country:** Enter the country in which the client resides.

- **Comment:** Enter any comments you wish to note about the client. This is for internal purposes only.

- **Start Date:** Enter the date on which the patient began attending your facility. This date will be automatically populated via the API.*

- **End Date:** Enter the date on which the patient stopped attending your facility. This date will be automatically populated via the API.*

- **Opted in Date:** This date will be automatically populated with the date on which the client was created.

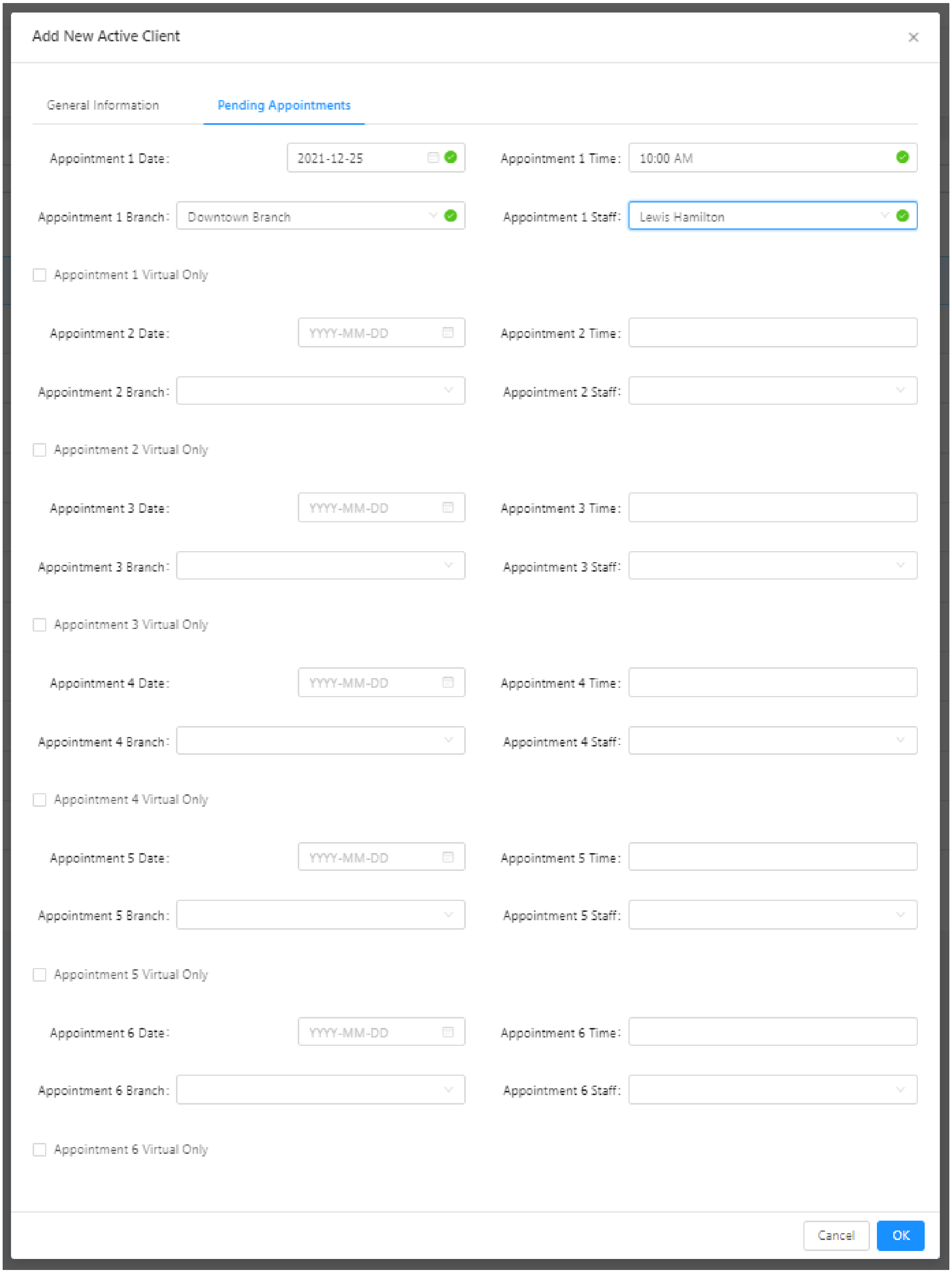
- **Last Visit Date:** The date that the client last visited your facility. This date will be automatically populated via the API.*

- **Last Cancelled Date:** The date of the client's last cancelled appointment at your facility. This date will be automatically populated via the API.*

- **# of Visits To-Date**: The cumulative number of visits this client has made to your facility. This figure will be automatically populated via the API.*

- **Last No Show Date:** The date of client client's last no show. This date will be automatically populated via the API.*

The fields in **Pending Appointments** work as follows:


Add New Active Client
General Information
Pending Appointments
Appointment 1 Date:
2021-12-25
Appointment 1 Time:
10:00 AM
Appointment 1 Branch:
Downtown Branch
Appointment 1 Staff:
Lewis Hamilton
Appointment 1 Virtual Only
Appointment 2 Date:
YYYY-MM-DD
Appointment 2 Time:
Appointment 2 Branch:
Appointment 2 Staff:
Appointment 2 Virtual Only
Appointment 3 Date:
YYYY-MM-DD
Appointment 3 Time:
Appointment 3 Branch:
Appointment 3 Staff:
Appointment 3 Virtual Only
Appointment 4 Date:
YYYY-MM-DD
Appointment 4 Time:
Appointment 4 Branch:
Appointment 4 Staff:
Appointment 4 Virtual Only
Appointment 5 Date:
YYYY-MM-DD
Appointment 5 Time:
Appointment 5 Branch:
Appointment 5 Staff:
Appointment 5 Virtual Only
Appointment 6 Date:
YYYY-MM-DD
Appointment 6 Time:
Appointment 6 Branch:
Appointment 6 Staff:
Appointment 6 Virtual Only
Cancel
OK

- **Appointment Date:** The date of the client's appointment.

- **Appointment Time:** The time of the client's appointment.

- **Appointment Branch:** The branch at which the client's appointment is scheduled.

- **Appointment Staff:** The staff member with whom the appointment is scheduled.

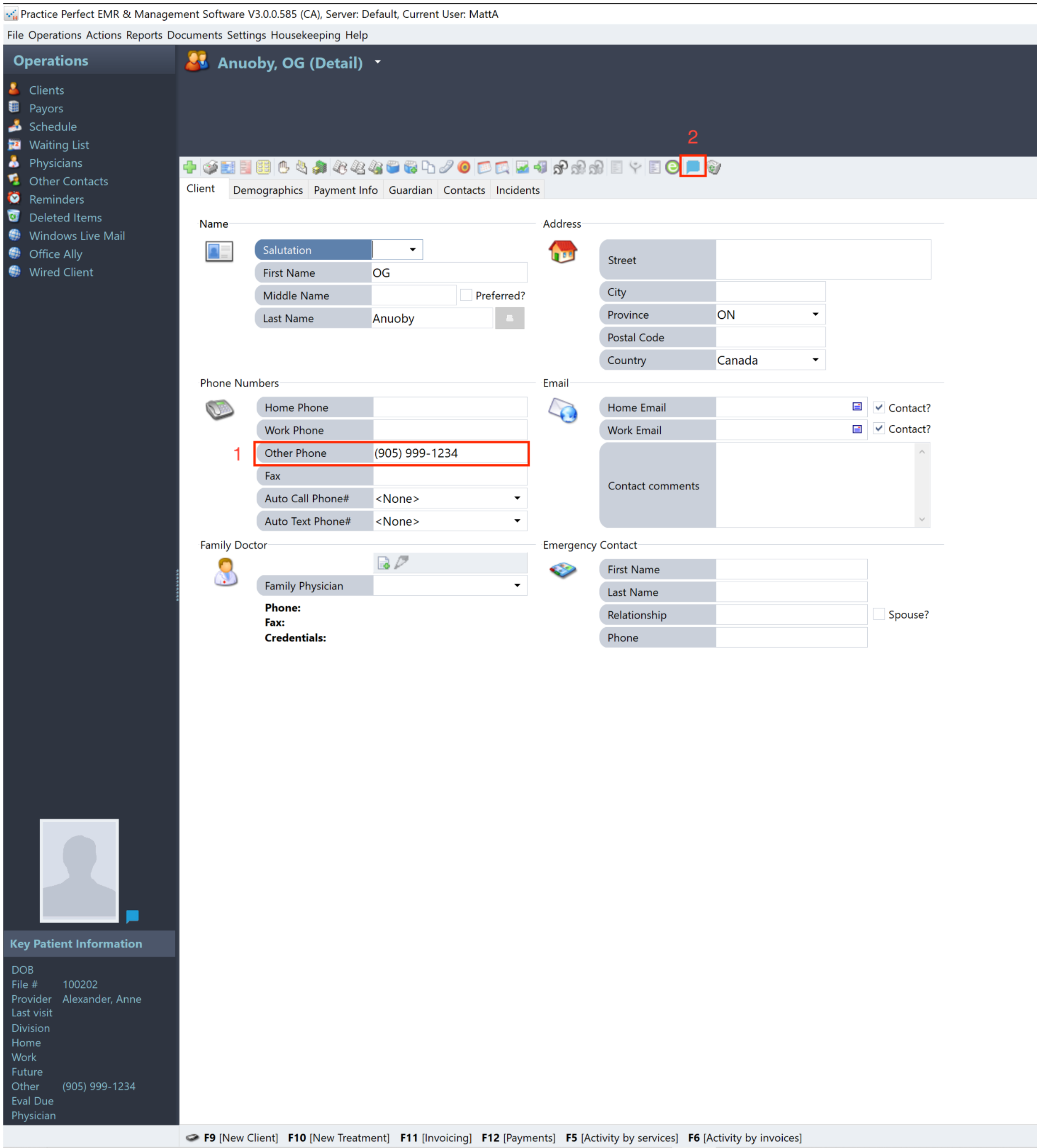
- **Virtual Only:** If this is a virtual appointment, it may require a unique appointment reminder specific to this type of visit. You may mark this appointment as Virtual Only so that a unique Event specific to this type of visit will be sent.

  Note: In Practice Perfect, you may mark an appointment as Telehealth when creating the appointment. This will check off the Virtual Only option next to the appointment in Wired Client and only send Events that have been marked Enable Virtual Appointment Only.

2) **Creating Clients via API (PP)**

Creating Client Profiles in Wired Client via the API is the preferred method for creating their profiles. Not only does it spare you from manual entry, but it also ensures that different schedule entries for this client (i.e. appointments booked, cancelled, edited, discharge, etc.) remain in sync between your management system and Wired Client.

A Client can be uploaded by following these simple steps:



1) Ensure their mobile number has been entered into the ‘Other Phone’ field. This is the only phone number field relevant to Wired Client. A patient is not able to be uploaded if this field is left blank.

Note: If the ‘Other Phone’ number is removed, their profile will cease to be updated.

2) Press the Wired Client icon on the **Function Bar** to upload this client to Wired Client. Clients can be uploaded either from within their Client Profile, or from the Scheduler. Clients can only be uploaded individually at this time.

Note: After uploading a client, the Wired Client icon will appear in the 'Key Patient Information' section next to their portrait. It will begin appearing in the Scheduler within their Appointment Cells thereafter.

You can prevent the Wired Client icon from appearing in the clients' Appointment Cell by navigating to Settings>Customize Schedule>Appointment Cell. Uncheck 'Show Wired Client icon on scheduler'.

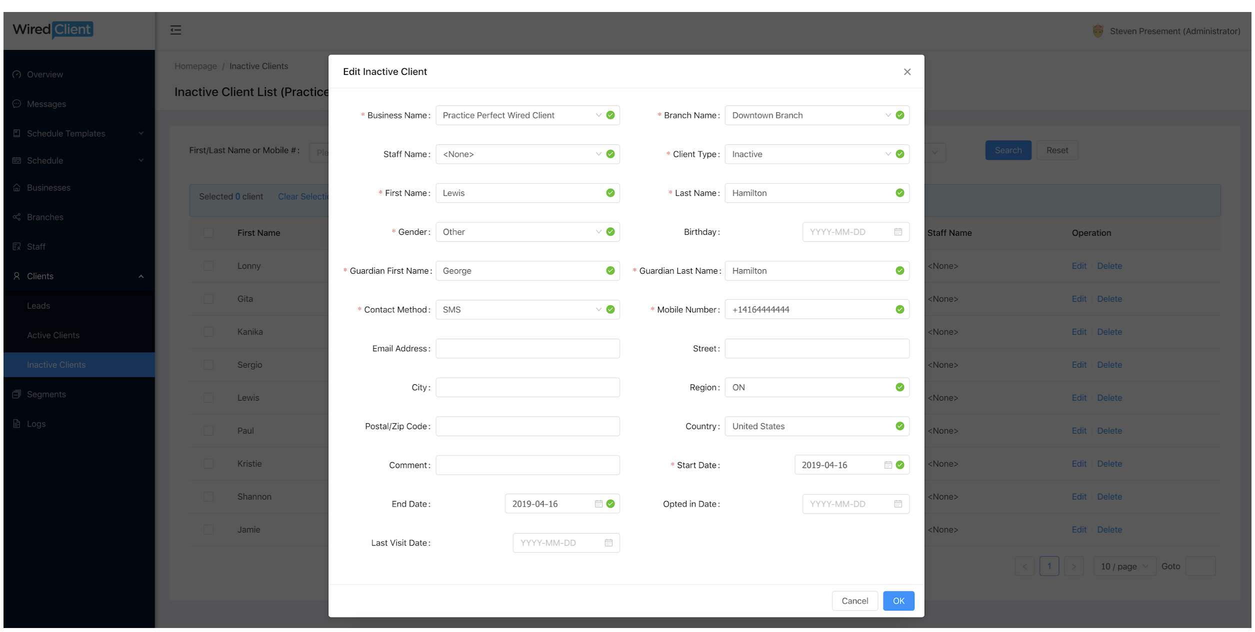
3.3. Inactive Clients

Inactive Clients represent the clients who have completed their course of care at your facility. It may also be an individual who has stopped attending. A client can be switched from an 'Active Client' to an 'Inactive Client' by changing their Client Type at any time.

When using Wired Client via the API, when a client is Discharged from all of their 'Active Incidents' in Practice Perfect, they will become an 'Inactive Client' in Wired Client. If you open a new Active Incident in Practice Perfect, they will be reverted to the 'Active Client' Client Type in Wired Client.

Inactive Clients have significantly fewer dates within their profile. This means they will automatically be prevented from receiving certain Events, and further discussed in 5.3.

The fields work as follows:



- **Business Name:** The name of your business will be autofilled. This field cannot be modified.

- **Branch Name:** Select the **Branch** to which this client is assigned. This is a required field.

- **Staff Name:** Select the Staff Member to which this client is assigned.

- **Client Type:** Client can be categorized as either a Lead, Active Client, or Inactive Client. Client Types can be changed to and from at any time.

- **First Name:** Enter the client's first name. This is a required field.

- **Last Name:** Enter the client's last name. This is a required field.

- **Gender:** Enter the client's gender, if necessary. Gender will default to 'Rather not say'.

- **Birthday:** Enter the client's date of birth.

- **Preferred Language:** Choose the client's Preferred Language. This field will default to English (EN). Other languages currently supported include Spanish (ES) and French (FR).

  Wired Client will send the corresponding version of the Message Template to the client based on their Preferred Language.

  Note: If the client is uploaded from Practice Perfect, this field will be automatically populated with the Preferred Language entered in the Demographics tab. If the language is entered as either Spanish, Espanol, or ES, it will translate to ES in Wired Client. If the language is entered as French, Francais, or FR, it will be translated to FR in Wired Client.

- **Guardian First Name:** If this client has a guardian (i.e. a pediatric client), you may enter their first name.

- **Guardian Last Name:** If this client has a guardian (i.e. a pediatric client), you may enter their last name.

- **Contact Method:** Choose the means of contact for this client. Please note that only SMS is currently available.

- **Mobile Number:** Enter the client's mobile number. This number will be used for all SMS communications with the client. Please note that Wired Client is not capable of delivering messages to landlines. This is a required field.

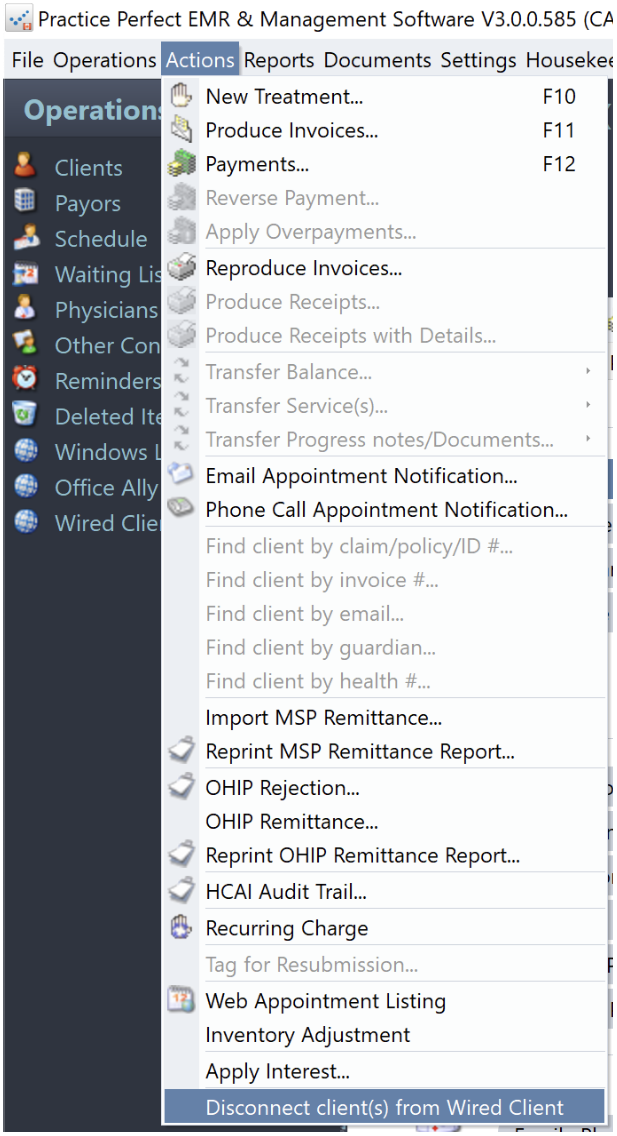
- **Email Address:** Enter the client's email address.

- **Street:** Enter the client's street address.
- **City:** Enter the city in which this client resides.
- **Region:** Enter the province or state in which the client resides.
- **Postal Code/Zip Code:** Enter the postal/zip code of the area in which the client resides.
- **Country:** Enter the country in which the client resides.
- **Comment:** Enter any comments you wish to note about the client. This is for internal purposes only.
- **Start Date:** Enter the date on which the patient began attending your facility.
- **End Date:** Enter the date on which the patient stopped attending your facility.
- **Opted in Date:** This date will be automatically populated with the date on which the client was created.
- **Last Visit Date:** The date that the client last visited your facility. This date will be automatically populated via the API.*

3.4. Disabling Client Profiles via API (PP)

To disconnect a Client from Wired Client within Practice Perfect, you may do so by selecting Actions>Disconnect Client(s) from Wired Client. You must be either within the client's profile, or flag their profile from your Client List for this option to be usable.

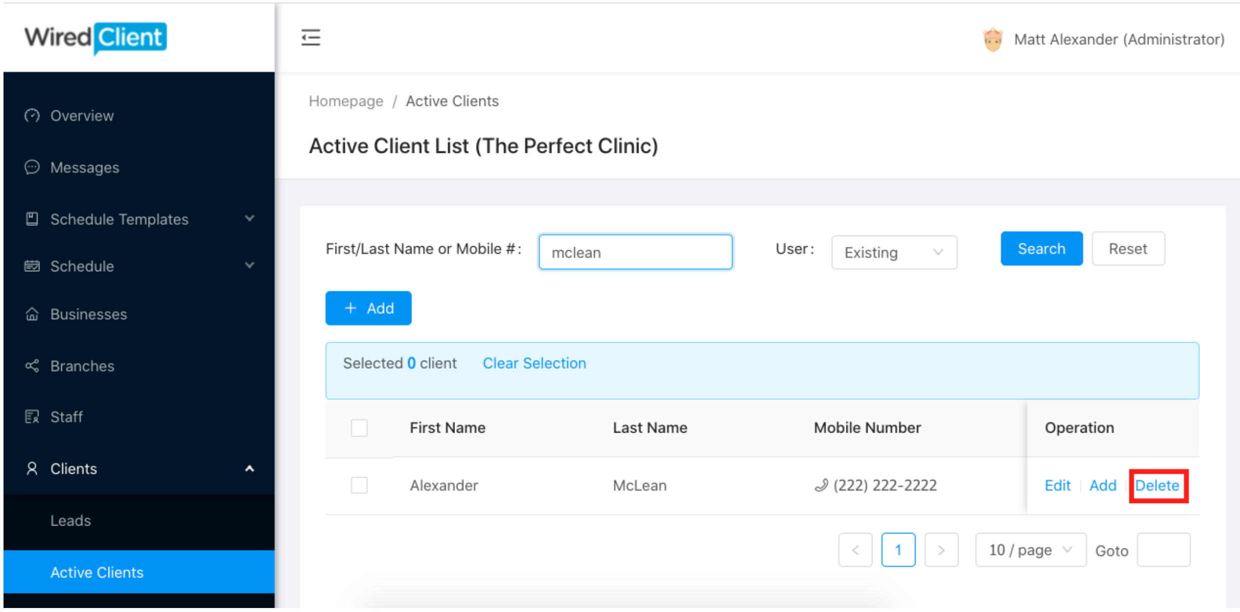
This also removes the Wired Client icon from the 'Key Patient Information' section for this client, and prevents the icon from appearing on their appointments moving forward.



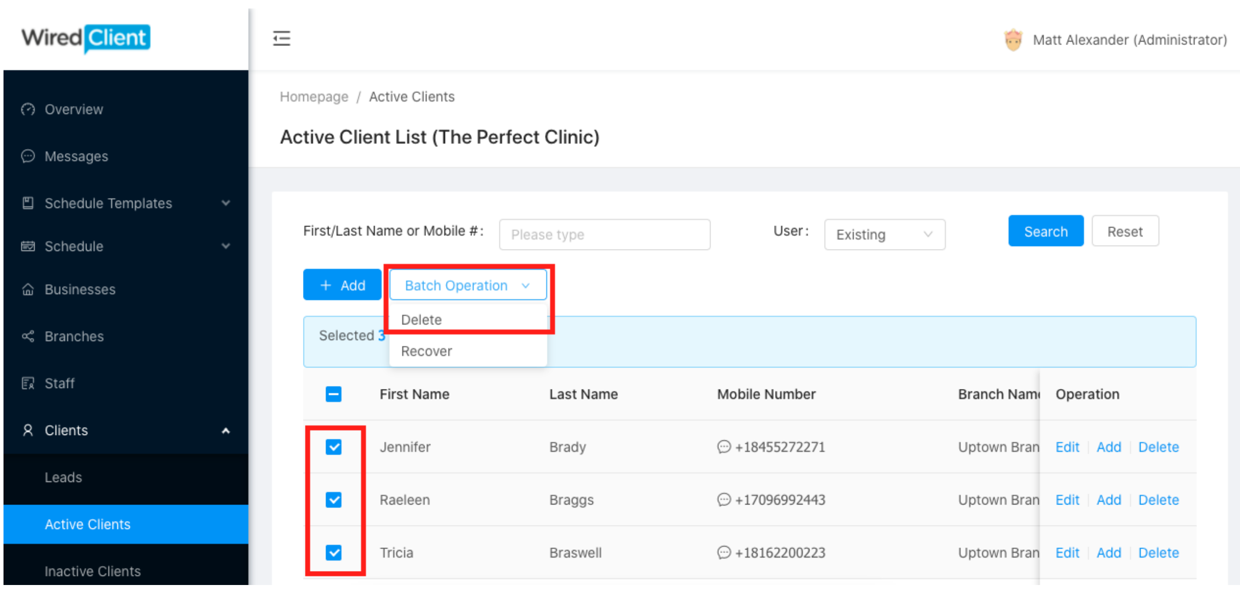
3.5. Deleting Client Profiles

Deleting a client in Wired Client will: a) prevent them from appearing in your client list and b) prevent them from receiving further messages. It also moves them to a different view called 'Deleted'.

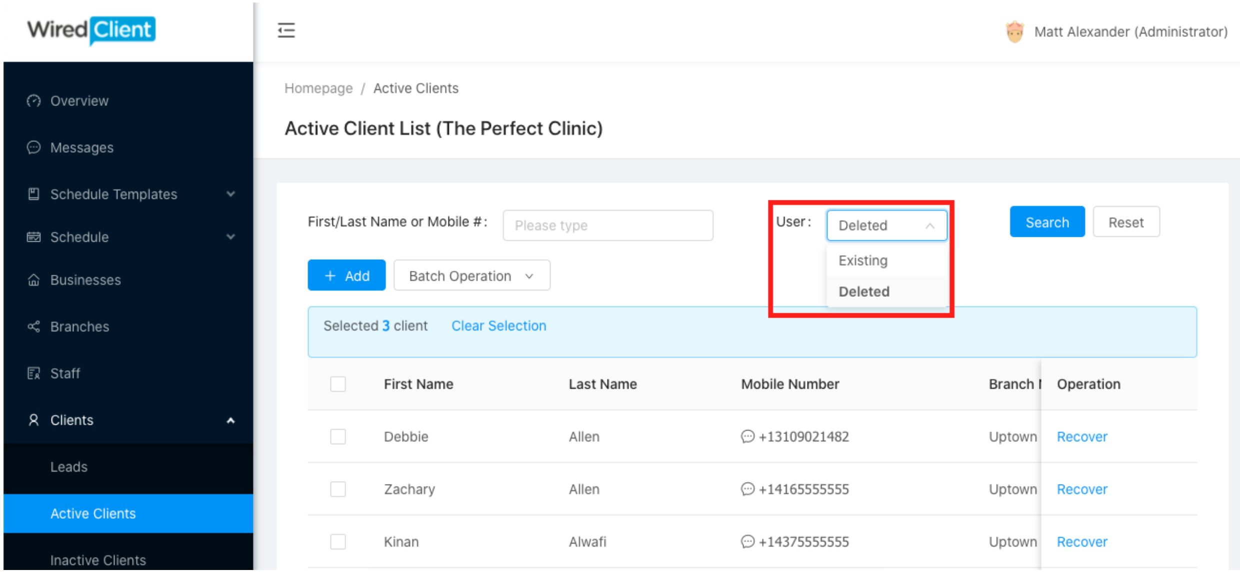
To delete a single client, you may click 'Delete' in the client's row.



To delete multiple clients simultaneously, you may flag them using the checkbox on the left hand sidebar and select 'Batch Operation' and then 'Delete'.

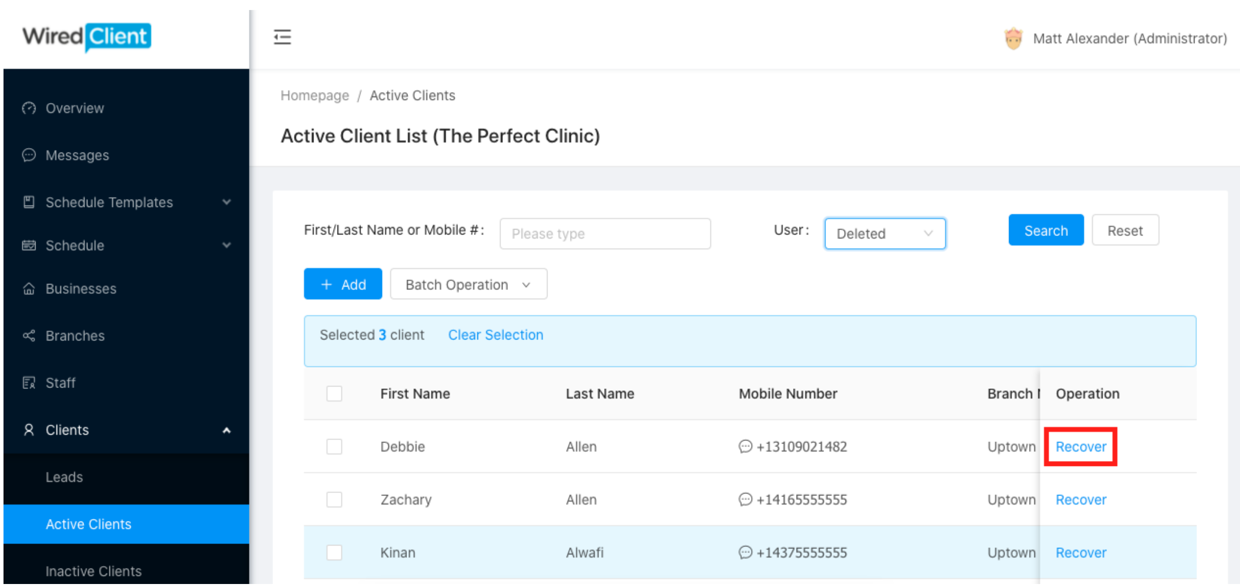


To view your 'Deleted' clients, select the 'Client' dropdown and choose 'Deleted'. A list of your 'Deleted' clients will be displayed.

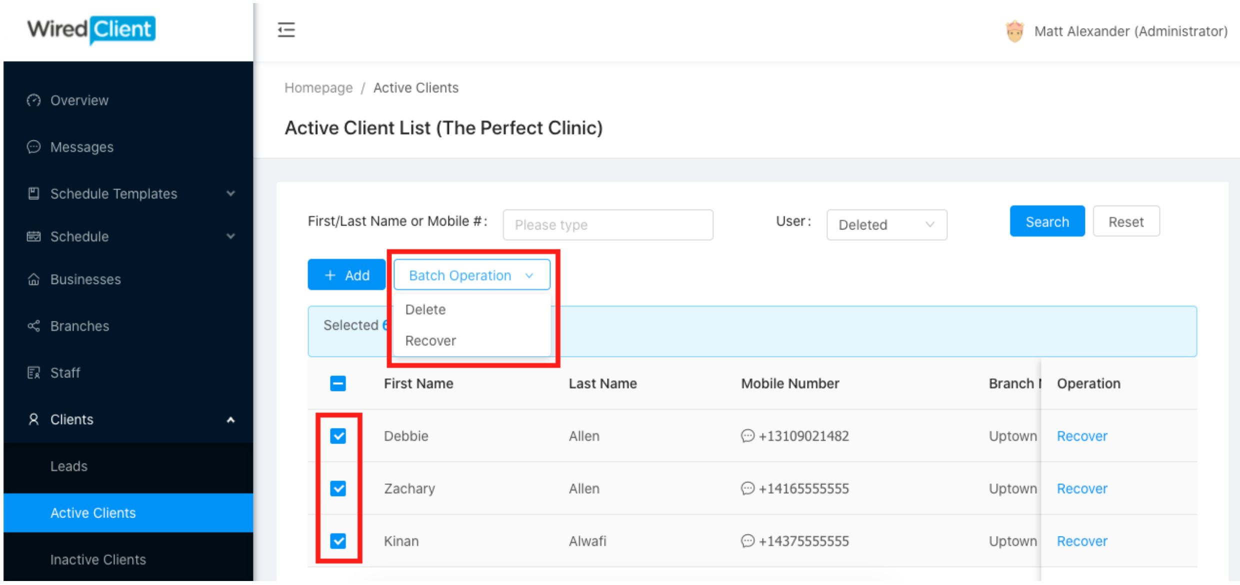


3.6. Recovering Client Profiles

To recover a 'Deleted' client profile, and return them to your client lists, navigate to the 'Deleted' client list (3.5). Select 'Recover' on the right hand side of the screen in the 'Operation' column.



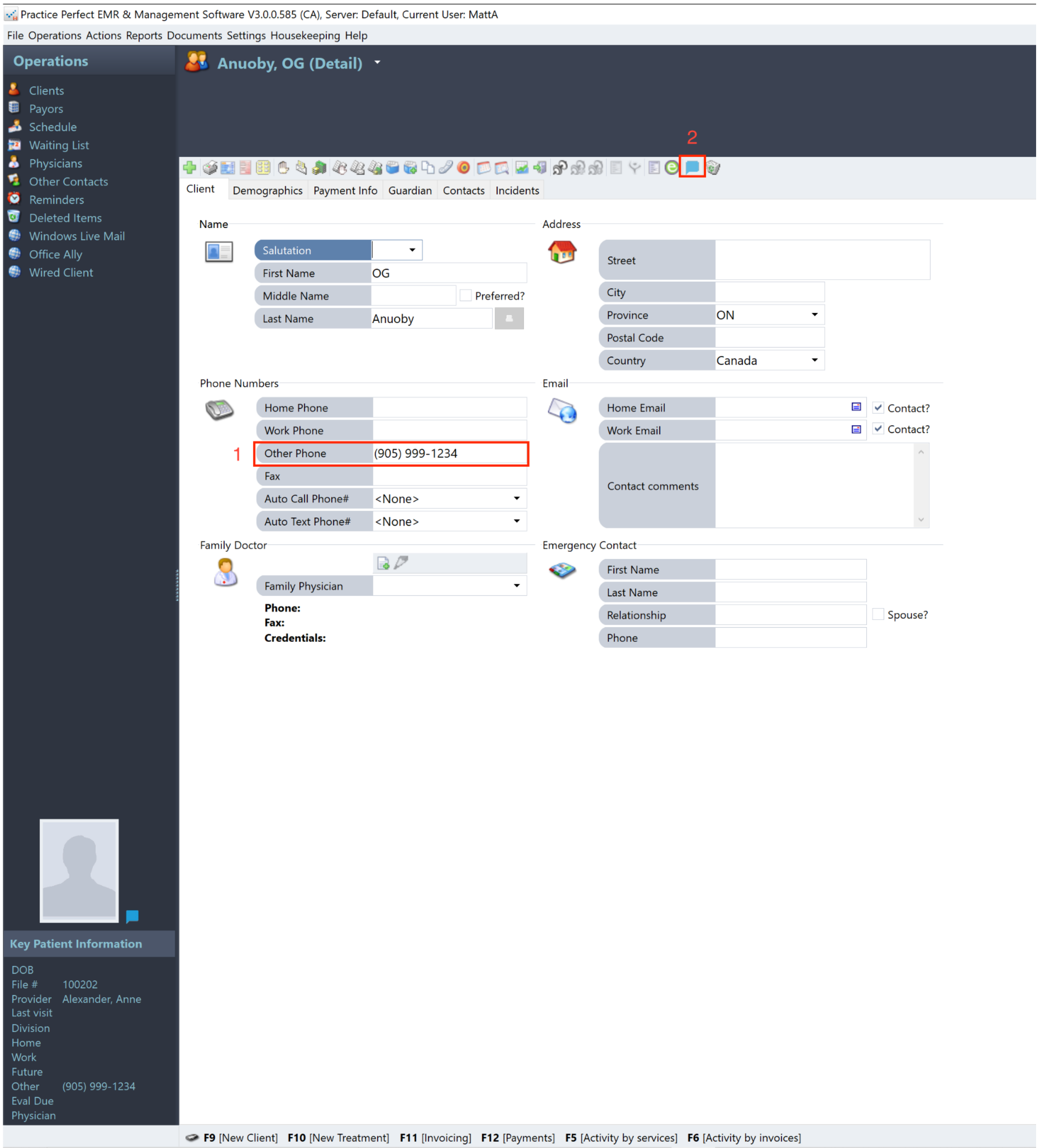
To 'Recover' multiple clients simultaneously, you may flag them using the checkbox on the left hand sidebar and select 'Batch Operation' and then 'Recover'.



3.7 Creating Client Profiles via API

Creating Client Profiles via the API represents the bulk of the setup. Fortunately, Campaigns can be automatically assigned to newly created clients, ensuring that following the steps below initiates a chain of Events.

To begin, enter a Client's Profile in Practice Perfect.

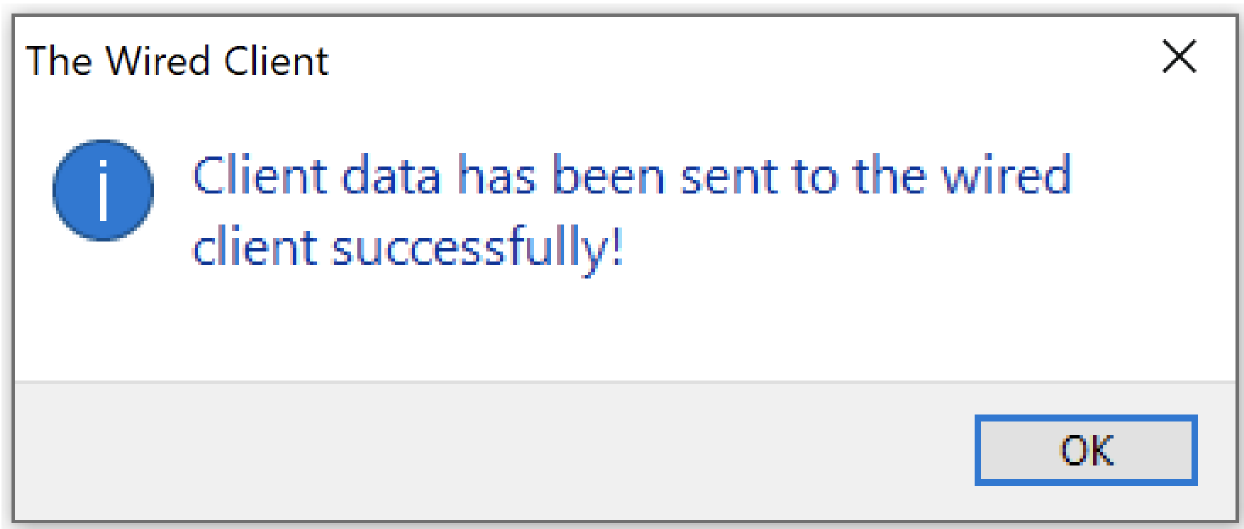


There are two things which must be done for a Client's profile to be uploaded to Wired Client:

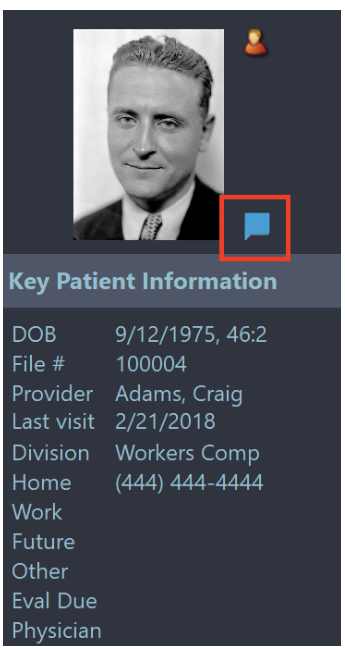
1) The Client must have a mobile phone number entered in the **Other Phone** field.

2) Click the **Wired Client Button** on the **Function Bar** to send the provider's data to Wired Client.

Upon sending the Client to Wired Client for the first time, the following dialogue box will appear.

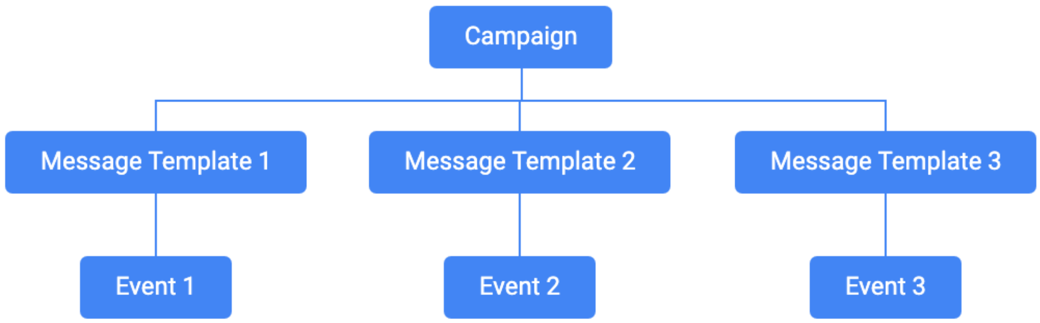


A Wired Client icon will also appear next to the client's portrait in the **Key Patient Information** section of the left-hand sidebar. It will begin appearing in their appointment cells, as well (discussed in Section 9.5).



4. Schedule: Message Templates

The 'Schedule' section consists of three parts: Message Templates, Events, and Campaigns. These three components work together to send messages to your clients automatically. A visual explanation of the relationship between between Message Templates, Events, and Campaigns can be seen below:

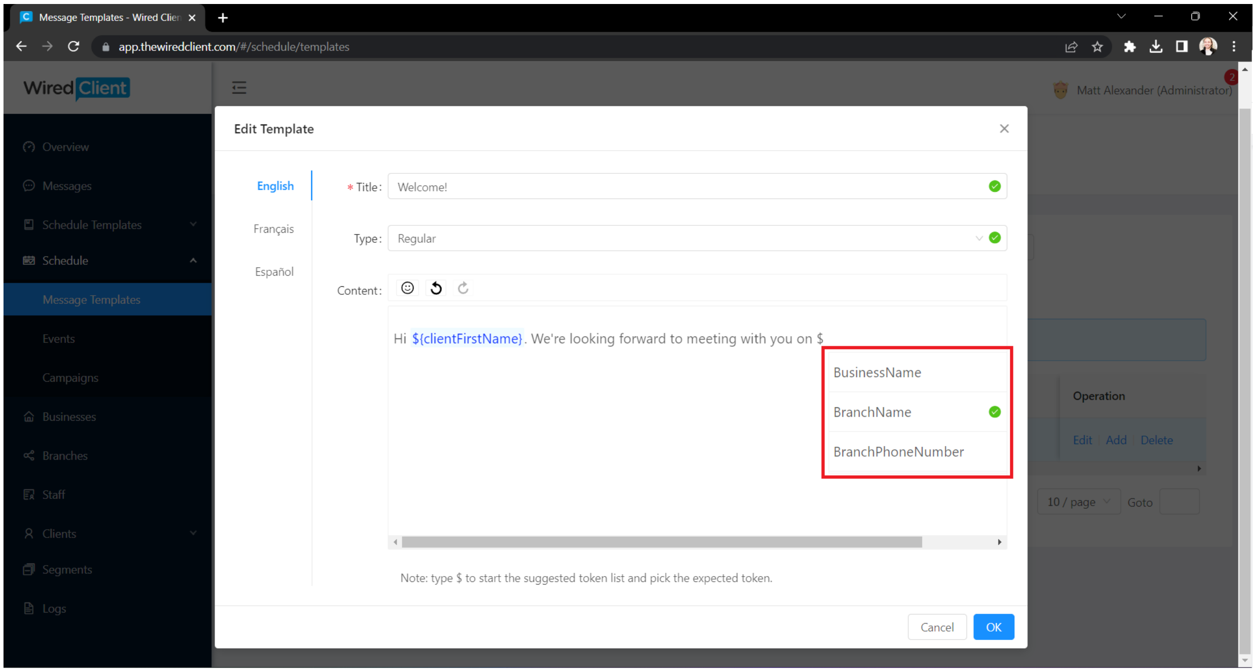


Here's an example of a Campaign using actual names:

The first step in setting up automated messages is creating a 'Message Template'--this represents the actual text message that you will be sending.

4.1 Understanding 'Tokens'

'Message Templates' employ 'Tokens' to autofill the text messages with information from either the client's, staff's or branch's profile. This ensures that any message sent to them contains information that is specific to them or the office at which they're being seen(i.e. Client's first name, client's next appointment date, branch address, etc.).



Tokens are created by Wired Client. Users do not have the ability to create their own custom tokens at this time.

To insert a Token in a Message Template, type a dollar sign ($). The list of available tokens will appear. You may either scroll through the list, or begin typing the name of the token

4.2 Default Message Templates

New Wired Client accounts are preloaded with several Default Message Templates. These are designed to be used out of the box, and are already tied to corresponding 'Events' and the 'Default Campaign'.

They are as follows:

- **Appointment Reminder:** Hi ${clientFirstName}! Your next visit at ${nextAppointmentBranchName} is ${nextAppointmentDate} at ${nextAppointmentTime} with ${nextAppointmentStaffFirstName}. Please reply STOP to unsubscribe.

- **Appointment Reminder - Day of**: Hi ${clientFirstName}. Your appointment today is at ${nextAppointmentTime}. See you soon! Reply STOP to unsubscribe.

- **Birthday:** Happy Birthday, ${clientFirstName}! From your friends at ${businessName}. 🍰

- **Discharge 1:** Congratulations, ${clientFirstName}! You completed your course of care at ${branchName}. We're glad to have helped you on your road to recovery. Should you ever need anything in the future, please don't hesitate to text us at ${branchSMSNumber} or give us a call at ${branchPhoneNumber}.

- **Discharge 2:** Hi ${clientFirstName}. Just wanted to touch base. Did you know it's been a whole month since your discharge? Time flies. By now you're probably well on your way to recovery, but if you ever need a hand with anything, or if you have a friend who could use our services, please give us a call at ${branchPhoneNumber}.

- **Fall-off:** Hi ${clientFirstName}. It's been a couple weeks since we last saw you on ${clientLastVisitDate}. Are you feeling good? Were things not going well? Either way, we would like to know! Please feel free to text us at ${branchSMSNumber} or give us a call at ${branchPhoneNumber} to book an appointment to make sure you are on the road to recovery.

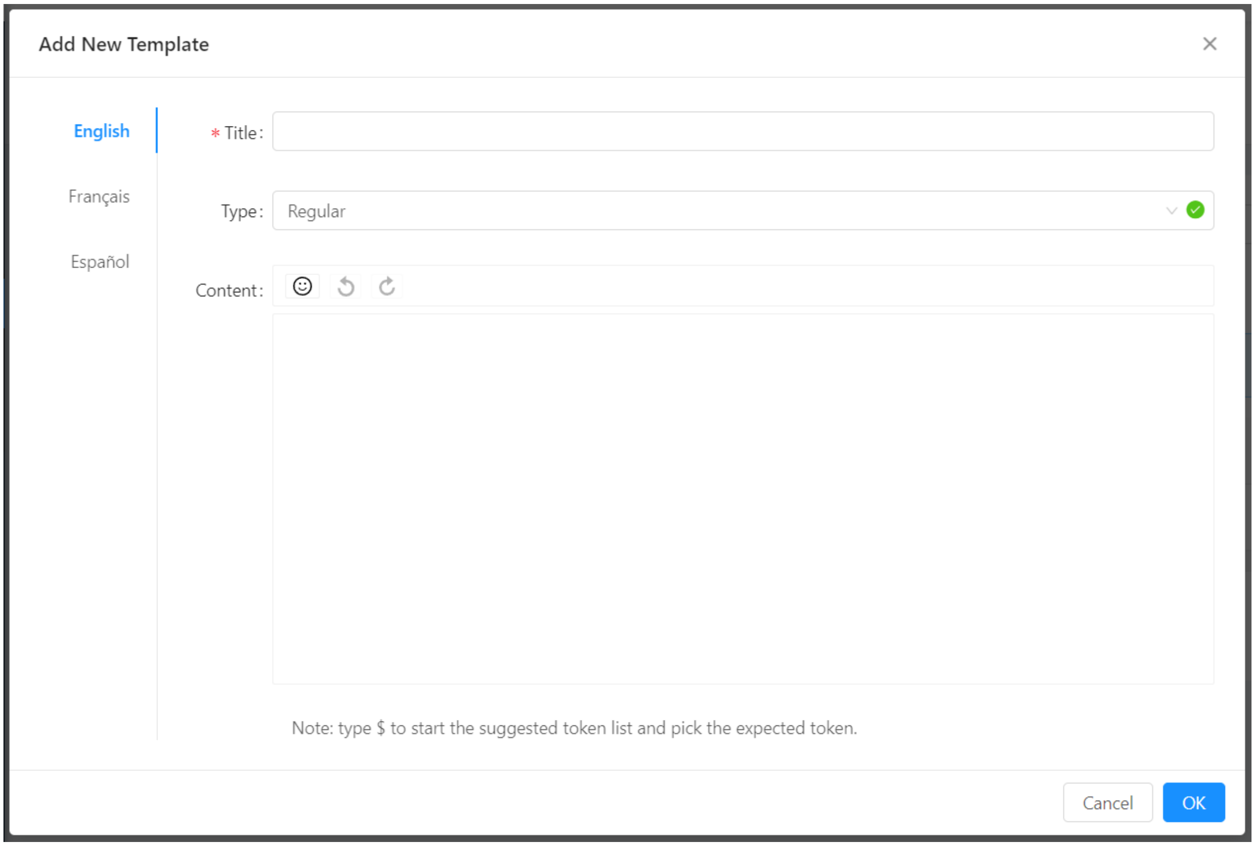
- **New Year:** Happy New Year, ${clientFirstName}! Wishing you and your loved ones a wonderful year.

- **Third Visit:** Hi ${clientFirstName}! Congratulations on completing your third visit at ${businessName} on ${clientLastVisitDate}. Let us know if there's anything ${staffFirstName} can be doing to better accommodate you, or if you have any questions. Thanks!

- **Welcome:** Hi ${clientFirstName}! Thank you for visiting ${businessName}. We're glad to be working with you! Should you need anything, please don't hesitate to text us at ${branchSMSNumber} or give us a call at ${branchPhoneNumber}. Have a great day!

4.3 Creating Custom Message Templates

Users can create their own custom 'Message Templates'. To do so, click the blue 'Add' button. The following panel will appear:



Title: Enter a title for your new Message Template. This is for reference only, and will not be visible to the receiver. This is a required field.

Type: Choose either 'Regular' or 'Survey'. In most cases, 'Regular' will be sufficient. 'Survey' is discussed in 4.4.

Content: Enter the text you'd like to include in your message. To insert a Token in a Message Template, type a dollar sign ($). The list of available tokens will appear.

You may click the **smiley face**  to reveal the available emojis.

Note: Including emojis in your 'Message Templates' changes them from a regular text message segment to a unicode text message segment, reducing the length of the text message segment from 160 characters to 70 characters.

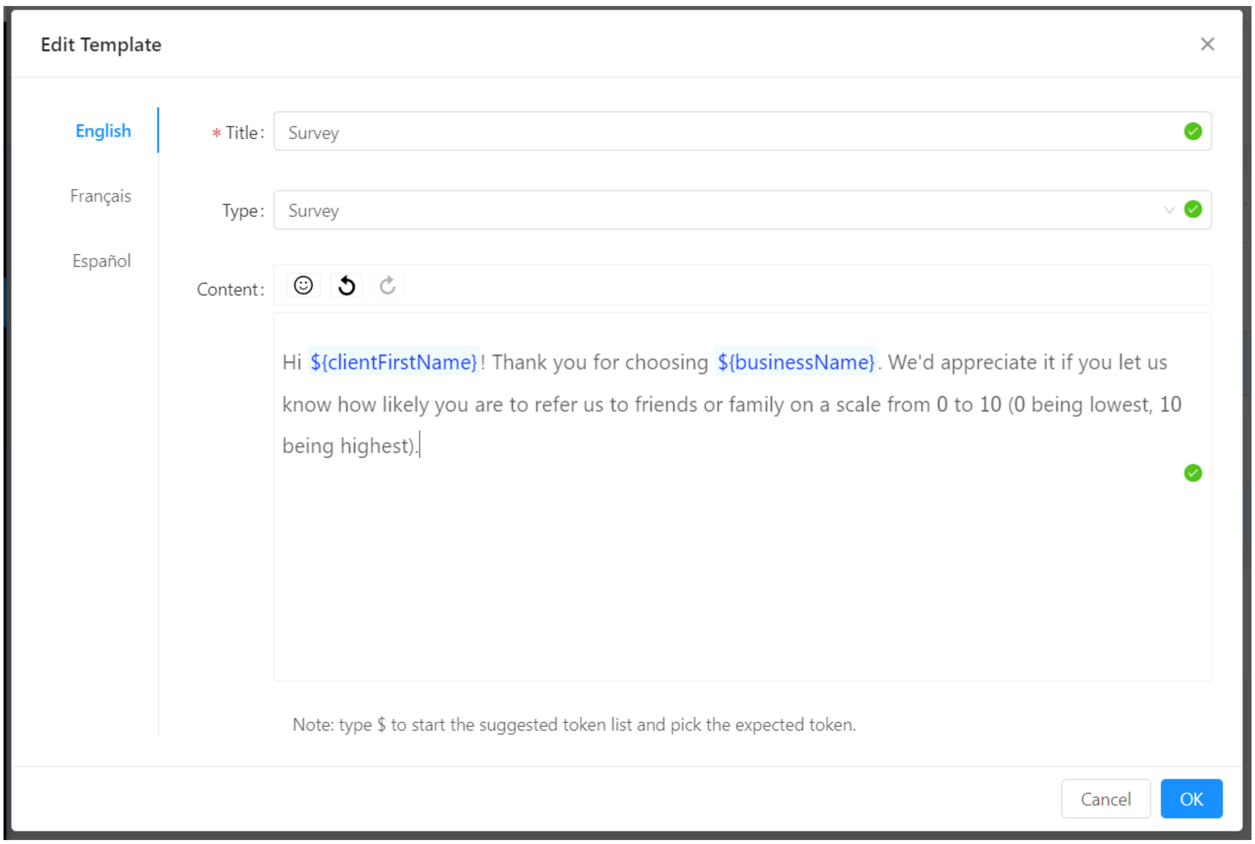
Language: Wired Client currently supports English, French, and Spanish Message Templates. You may create an alternate version of the Message Template in French or Spanish here. When sending the Message Template, Wired Client will consider the **Preferred Language** in the Client Profile and send the corresponding version of the Message Template.

4.4 Creating Surveys

Creating a **'Survey'** is virtually the same as creating a Message Template, albeit for two key differences.

'Type' must be changed to **'Survey'**. This configures the Message Template so that it can acknowledge responses between 0 and 10, and send the corresponding Survey Auto Reply (discussed in 1.5).

The 'Content' section should ask the recipient to send a reply between 0 and 10. The recipient must reply with only a number for a Survey Auto Reply to be sent. See below for an example:



4.5 Available Tokens

The following 'Tokens' are available for use in your Message Templates:

BusinessName	The name of your business.

BranchName	The name of the branch to which this client is assigned.
BranchPhoneNumber	The phone number of the branch to which this client is assigned.
BranchSMSNumber	The SMS number of the branch to which this client is assigned.
BranchAddress	The address of the branch to which this client is assigned.
BranchEmailAddress	The email address of the branch to which this client is assigned.
BranchURL1	The corresponding URL 1 from the branch to which this client is assigned.
BranchURL2	The corresponding URL 2 from the branch to which this client is assigned.
BranchURL3	The corresponding URL 3 from the branch to which this client is assigned.
ClientFirstName	The client’s first name.
ClientLastName	The client’s last name.
ClientLastVisitDate	The last date on which the client visited your facility.
GuardianFirstName	The client’s guardian’s first name.
GuardianLastName	The client’s guardian’s last name.
NextAppointmentDate	The client’s next appointment date.
NextAppointmentTime	The client’s next appointment time.
NextAppointmentStaffFirstName	The first name of the staff member with whom the client is scheduled next.
NextAppointmentStaffLastName	The last name of the staff member with whom the client is scheduled next.
NextAppointmentStaffURL	The URL entered in the profile of the staff member with whom the client is scheduled

	next.
NextAppointmentStaffJobTitle	The job title of the staff member with whom the client is scheduled next.
NextAppointmentBranchName	The name of the branch at which the client is scheduled next.
NextAppointmentBranchPhoneNumber	The phone number of the branch at which the client is scheduled next.
NextAppointmentBranchSMSNumber	The SMS number of the branch at which the client is scheduled next.
NextAppointmentBranchAddress	The address of the branch at which the client is scheduled next.
NextAppointmentBranchEmailAddress	The email address of the branch at which the client is scheduled next.
NextAppointmentBranchURL1	The corresponding URL 1 of the branch at which the client is scheduled next.
NextAppointmentBranchURL2	The corresponding URL 2 of the branch at which the client is scheduled next.
NextAppointmentBranchURL3	The corresponding URL 3 of the branch at which the client is scheduled next.
StaffFirstName	The first name of the staff member assigned to this client.
StaffLastName	The last name of the staff member assigned to this client.
StaffURL	The URL of the staff member assigned to this client.
StaffJobTitle	The job title of the staff member assigned to this client.

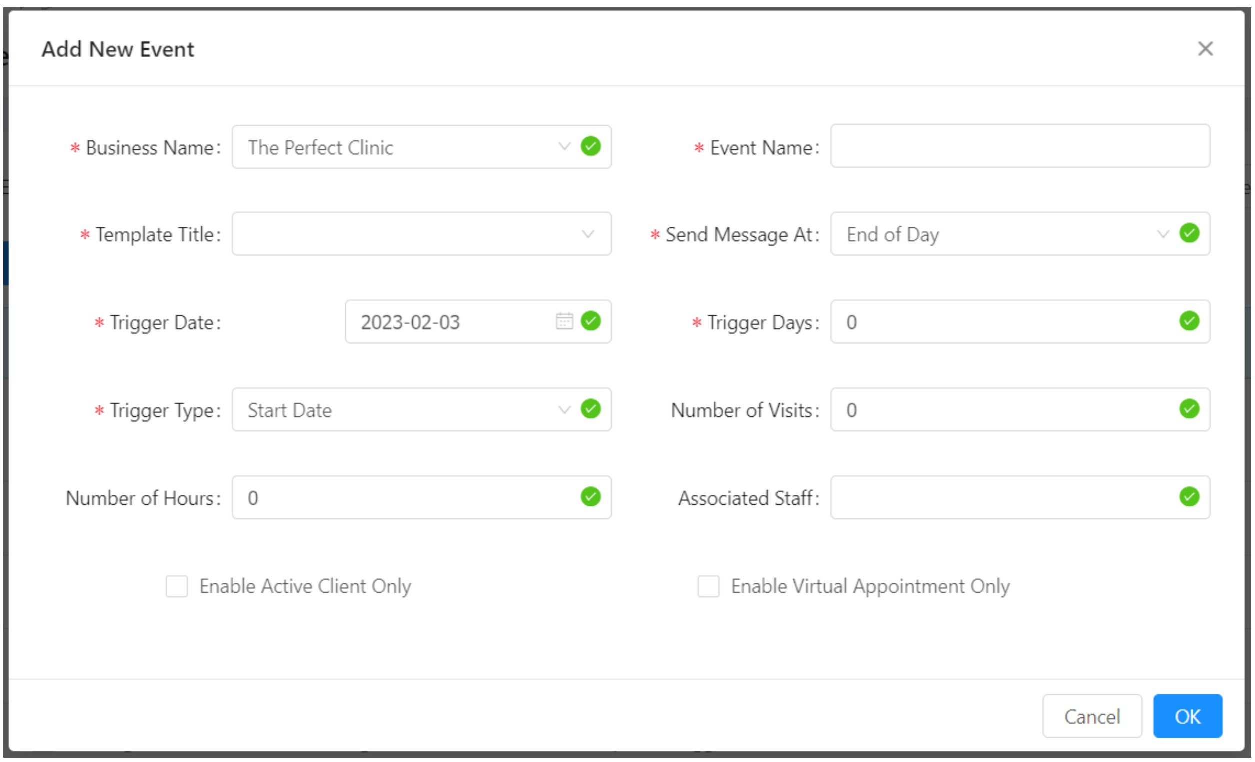
5. Schedule: Events

'Events' are how messages are automated in Wired Client. Each Message Template must be paired with an Event in order for it to be sent automatically. They are the *triggers* for these messages, and dictate the conditions that must be met in order for them to be sent.

Note: New accounts are pre-loaded with 'Events' which correspond with the Default Message Templates.

5.1. Creating a New Event

To create a new 'Event', click the blue 'Add' button. The following panel will appear:



The fields work as follows:

- **Business Name:** This field will be auto filled with your Business Name.

- **Event Name:** Enter a name for your Event. This is for reference only and will not be visible to the recipient. We recommend using the same name as the Template Title.

- **Template Title:** A list of all available Message Templates. Choose the Message Template for which you are creating the Event.

- **Send Message At:** Choose either Start of Day or End of Day. These times refer to the Message Start and Message End time entered in the Branch settings. Your Event will be sent at one of these times.

- **Trigger Date:** The Trigger Date will default to the date you are creating the Event. Events can be triggered on a particular calendar date entered in the Trigger Date if the corresponding **Trigger Type** is either Specific Trigger Date or Annual Trigger Date.

- **Trigger Days:** Determines how many days before, on, or after the Trigger Type that the Event will be triggered.

  For example, if your Trigger Type is All Appointment Dates, and your Trigger Days is -1, the Event will be triggered one day prior to every appointment date. If the Trigger Type is Birth Date and the Trigger Days is 0, the Event will be triggered on the client's birthday. If the Trigger Type is End Date and the Trigger Days is 30, the Event will be triggered 30 days after the client's End Date.

- **Trigger Type:** The Trigger Type determines the conditions which must be met in order for this message to be sent. Whether the message is scheduled to be sent prior to an appointment date, on the client's date of birth, or on a specific calendar day, this is dictated by the Trigger Type.

  A detailed explanation of the available Trigger Types can be found in 5.2.

- **Number of Visits:** Number of Visits can be used in conjunction with the Number of Visits Trigger Type. This allows users to send messages to their clients after a certain number of visits have been completed.

- **Number of Hours:** Number of Hours can be used in conjunction with the # of Hours Before Next Appointment Trigger Type. Entering a number here will send a message a certain number of hours prior to the client's appointment (i.e. same day appointment reminder 1 hour prior to the appointment time).

- **Associated Staff:** Associated Staff allows you to filter this message so that it is only sent to Clients who are associated with a particular Staff profile. That Staff profile can either be listed in the General Information tab or the Appointment Staff in the Pending Appointments tab of the Clients' profile.

- **Enable Active Client Only:** Check off Enable Active Client Only to filter a message so that it is only sent to Active Clients. Generally all Trigger Types related to scheduled appointments, such as All Appointment Dates, Last Visit Date without Rebook, Last Cancelled Date, Last No Show Date, etc., will not be affected by this checkbox as Inactive Client Profiles do not offer a place for these fields, which would not allow the Event to be triggered.

- **Enable Virtual Appointment Only:** If this Event is being created for a virtual appointment (i.e. teletherapy) you may check off Enable Virtual Appointment Only so that appointments that are marked as 'Virtual Only' will be eligible for this Event.

  Note: Appointments marked as TeleHealth in Practice Perfect will be marked as Virtual Only in Wired Client, which will allow you to trigger Events which are marked as such.

5.2. Choosing a 'Trigger Type'

Deciding on the correct Trigger Type for your Event is a very important part of automating your message. Below is an explanation of the currently available Trigger Types:

Start Date	The date which the client began attending your facility. Trigger the Event on or X days after the client began attending your facility. The Start Date is pulled from the Contact Date in the client's earliest Incident in PP.
End Date	The date which the client was discharged from your facility. Trigger the Event on or X days after the client's End Date. The End Date will be populated with the client's most recent Discharge Date in PP.
Birth Date	The client's date of birth. Trigger the Event on their Birth Date.
Last Visit Date	The date of the client's last visit. Trigger the Event on or X days after the client's Last Visit Date.
Specific Trigger Date	The date entered in the Trigger Date field. Trigger the Event X days before, on, or X days after the Specific Trigger Date.

Annual Trigger Date	The Date entered in the Trigger Date field. Trigger the Event every year X days before, on, or X days after the Annual Trigger Date.
Last Cancelled Date	The date of the patient's last cancelled appointment. Trigger the Event on or X days after the Last Cancelled Date.
Next Appointment Date	The date of the patient's next appointment. Trigger the Event on or X days before the patient's next appointment. **Note**: This is a legacy feature. In the current iteration of the PP API, three pending appointments are sent to Wired Client. The Next Appointment Date Trigger Type is only capable of considering the next immediate appointment when sending a reminder. This will cause issues if the client has multiple appointments scheduled on a given day, or on consecutive days. We recommend using the All Appointment Dates Trigger Type instead.
Number of Visits	The number of visits the client has made to your facility. This Trigger Type works in conjunction with the Number of Visits field. Trigger the Event on or X days after the Number of Visits specified has been reached.
Last Visit Date without Rebook	An Active Client's last visit without having a future appointment scheduled. Trigger the Event X days after the client's Last Visit Date while simultaneously not having a Pending Appointment in their Client Profile.
Last Cancelled Date without Rebook	An Active Client's last cancellation without having a future appointment scheduled.

	Trigger the Event X days after the client's Last Cancelled Date while simultaneously not having a Pending Appointment in their Client Profile.
Opted in Date	The date that the client was created in Wired Client. Trigger the Event on or X days after their Client Profile is created in Wired Client.
Prior to the First Visit	The days leading up to the client's first visit to your facility. Trigger the Event X days before the client's first visit while they do not have any previous visits recorded in their Client Profile.
Last No Show Date without Rebook	An Active Client's last no show without having a future appointment scheduled. Trigger the Event X days after the client's Last No Show Date while simultaneously not having a Pending Appointment in their Client Profile.
All Appointment Dates	The client's pending appointments. Trigger the Event X days before or on the client's pending appointment. **Note**: This Trigger Type is preferred to the Next Appointment Date Trigger Type for the purpose of appointment reminders. The Appointment Dates Trigger Type is capable of considering *all* Pending Appointments, rather than just the next immediate appointment, when sending appointment reminders. Despite this, the reminder is only sent for a given appointment date.
Last No Show Date	The date of a client's last no show.

	Trigger the Event on or X days after the client’s last No Show Date. An appointment is considered a No Show when marked as ‘Did not attend’ in PP.
# of Hours Before Next Appointment	A number of hours before the client’s next immediate appointment (i.e. same day appointment reminder. The Trigger Type works in conjunction with the Number of Hours field. Trigger the Event X hours prior to the patient’s Pending Appointment.

6. Schedule: Campaigns

‘Campaigns’ are a combination of Message Templates and Events that have been grouped together so that they may be assigned to Clients, and the Message Templates/Events therein can be sent automatically.

6.1. How to Create/Edit a Campaign

Wired Client will be pre-loaded with the Default Campaign, containing the Default Message Templates/Events, pictured below.

	Campaign Name	Event Name	Last Modified	Operation
	Default Campaign	Appointment Reminder, Birthday, Discharge 1, Discharge 2, Fall-off, New Year, Third Visit, Welcome	2021-10-05, 09:46:06	Edit | Add | Delete

A new Campaign can be created by pressing the ‘Add’ button. The following panel will appear.

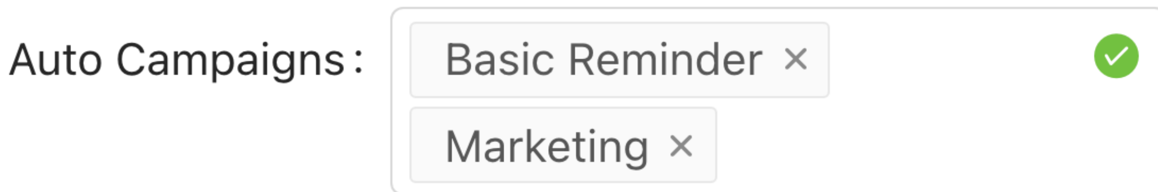
The Events on the left are available to be added to the Campaign. To add them, flag the Event and use the arrow to move it to the right. The Event is now a part of the Campaign. Click OK to save your changes.

You may Edit the Message Templates/Events within a Campaign at any time. By adding or removing a Message Template/Event from a Campaign that is assigned to clients,

6.2. Automatically Apply Campaigns to Clients

Campaigns can be assigned to clients automatically, ensuring that they receive all of the Events within upon creation in Wired Client.

To do so, ensure that your Campaign is listed in the Auto Campaigns field of the Branch settings (discussed in 1.1).

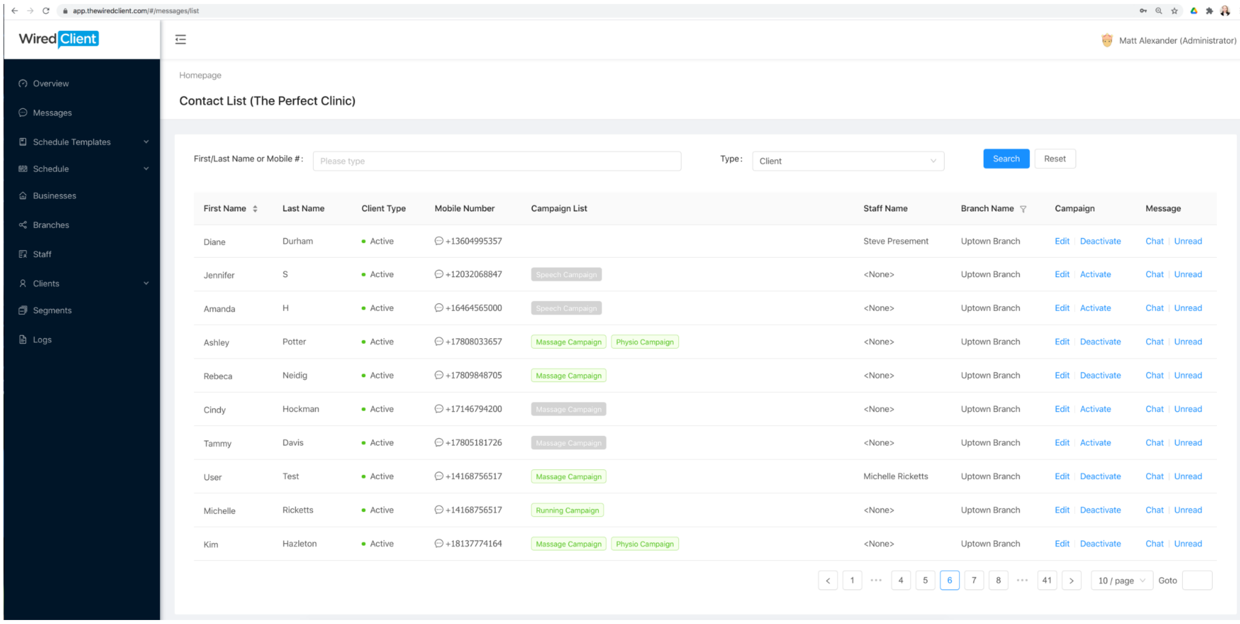


When a client from this Branch is either a) manually created in Wired Client or b) uploaded to Wired Client from Practice Perfect via the API, the Campaigns listed here will be assigned to them automatically.

7. Messages

The Messages screen is where the day to day use of Wired Client takes place. It contains a **Contact List** of all clients who have been uploaded to Wired Client. It's also where you can view which Campaign has been assigned to them, add or remove Campaigns from individual clients, and view and respond to incoming messages.

The Messages Screen features several columns. Below is a screenshot and a brief description of their use:



- **First Name:** Client's first name

- **Last Name:** Client's last name

- **Client Type:** A Lead, Active Client, or Inactive Client

- **Mobile Number:** Client's mobile number

- **Campaign List:** The Campaigns that have been assigned to this client

- **Staff Name:** The Staff Member that has been assigned to this client. Note that if a Staff Member has not been assigned to this client, it will read <None>.

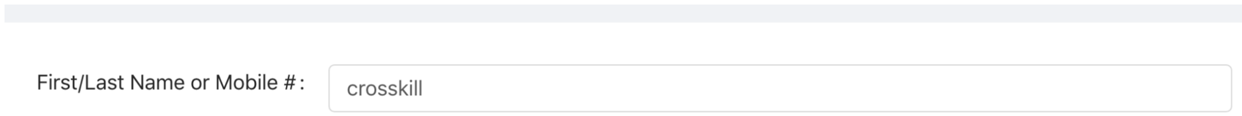
- **Branch Name:** The Branch to which this client has been assigned.

  Note: If you have multiple Branches on your account, you may select the filter icon  beside the Branch Name heading to view clients from a specific Branch.

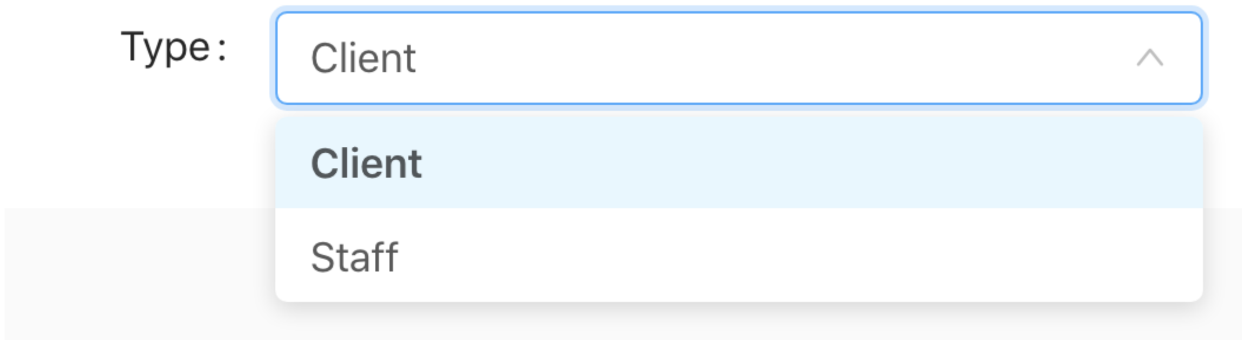
- **Campaign:** The Campaigns that have been assigned to this client.

- **Message:** Contains features which facilitate a two way conversation between the user and the client.

Users may search for specific clients by entering either their first name, last name, or mobile number in the **First/Last Name or Mobile #** search bar and clicking **Search**.

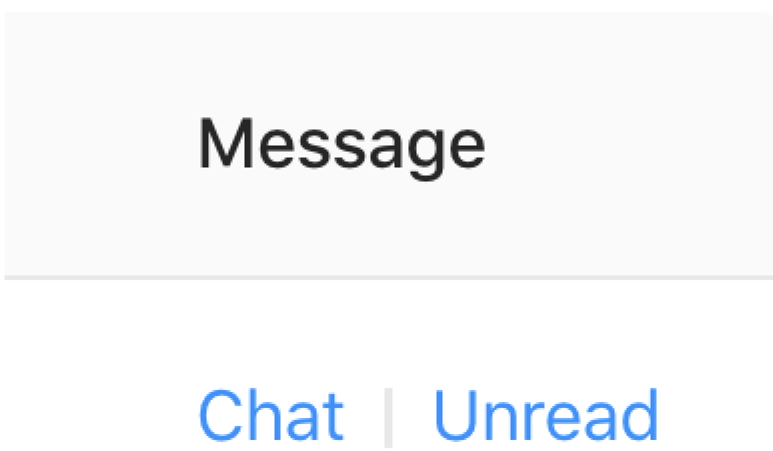


You may also view Staff Members by changing the **Type** from **Client** to **Staff** in the dropdown menu beside the search bar.

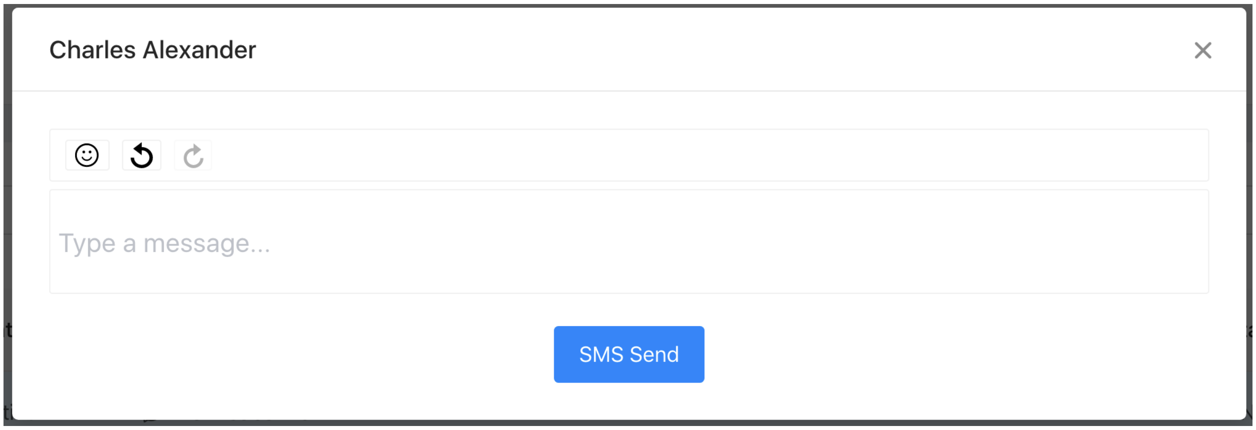


7.1. Sending One-Off Message

To send a one-off message to a client and engage in a conversation, click **Chat** in the Message column.



The following panel will appear:



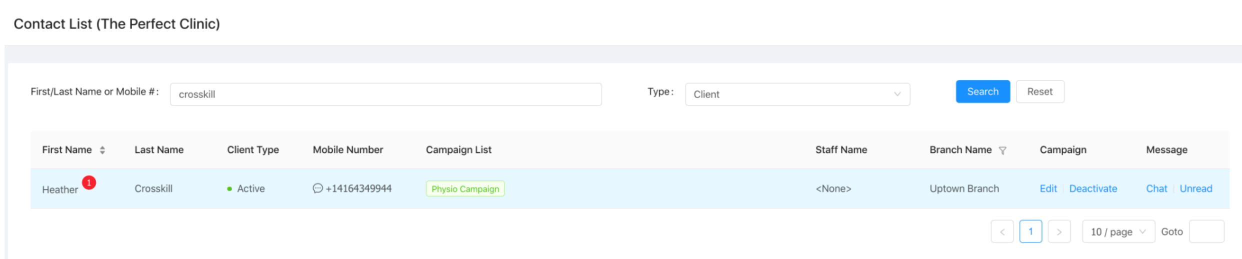
You may click the **smiley face**  to reveal the available emojis.

Type your message in the text box below. Click **SMS Send** to send your message.

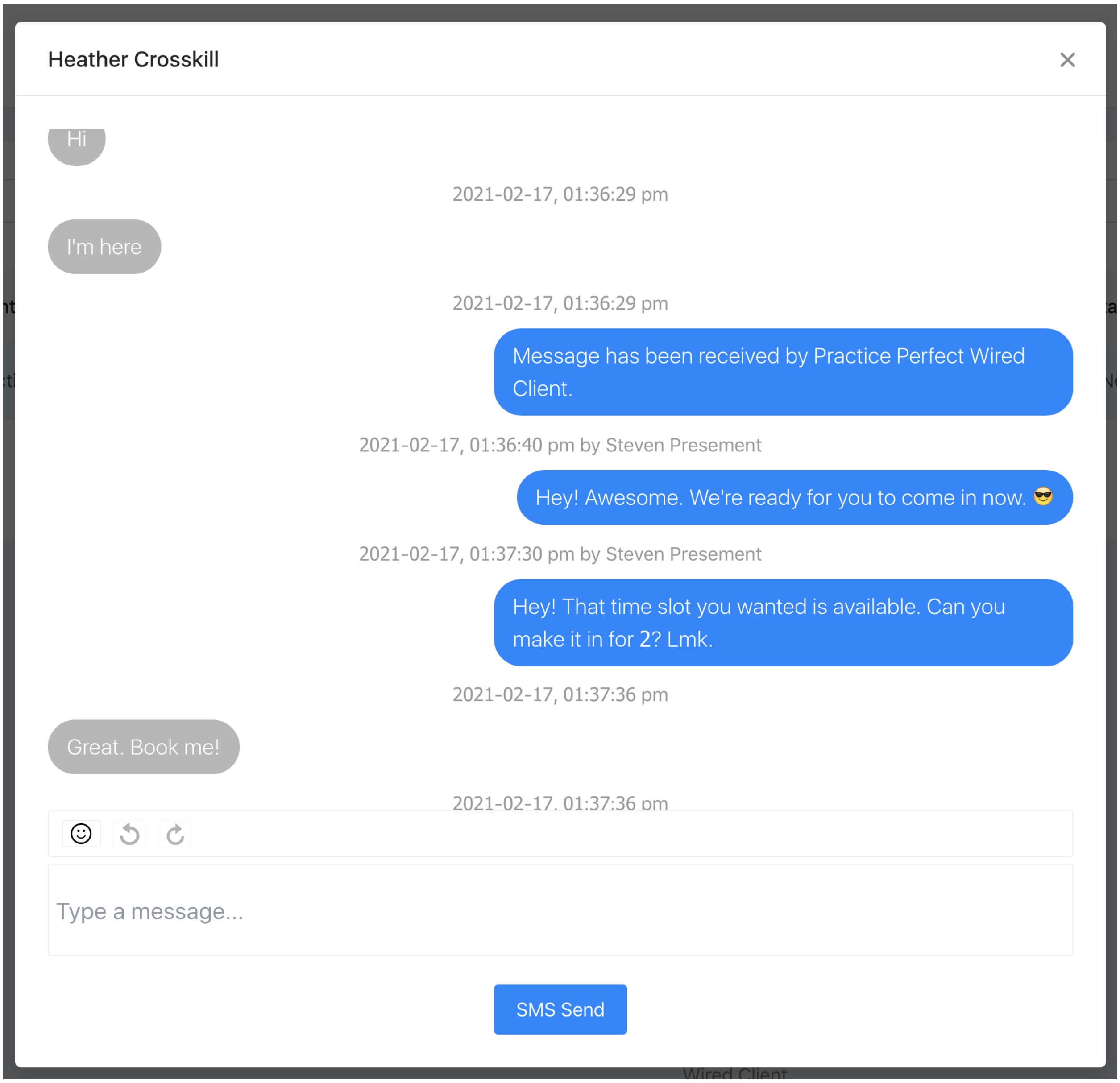
You may also use the arrow icons  to either Undo or Redo your previously typed text.

7.2. Reading and Replying to Incoming Messages

When a client replies to a message, it is visible in the Messages screen. A red icon appears above their first name. Clients with the most recent replies will appear at the top of your list.



Click Chat click Chat in the Message column to read their message. To send a reply, type your message in the text box below. Click **SMS Send** to send your message.



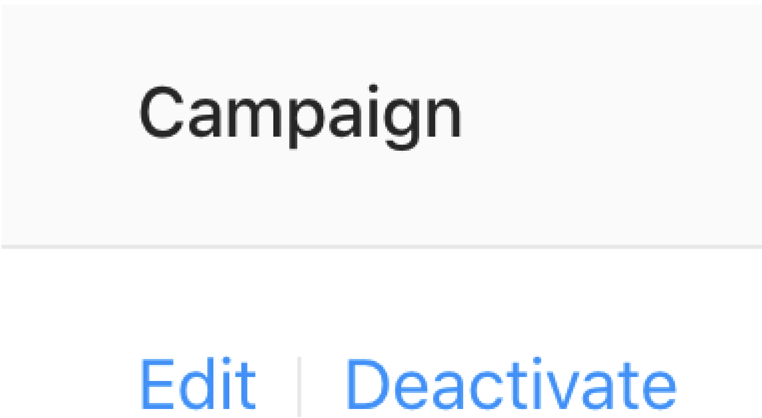
Incoming messages from the client appear in grey.

Outgoing messages sent from your facility appear in blue.

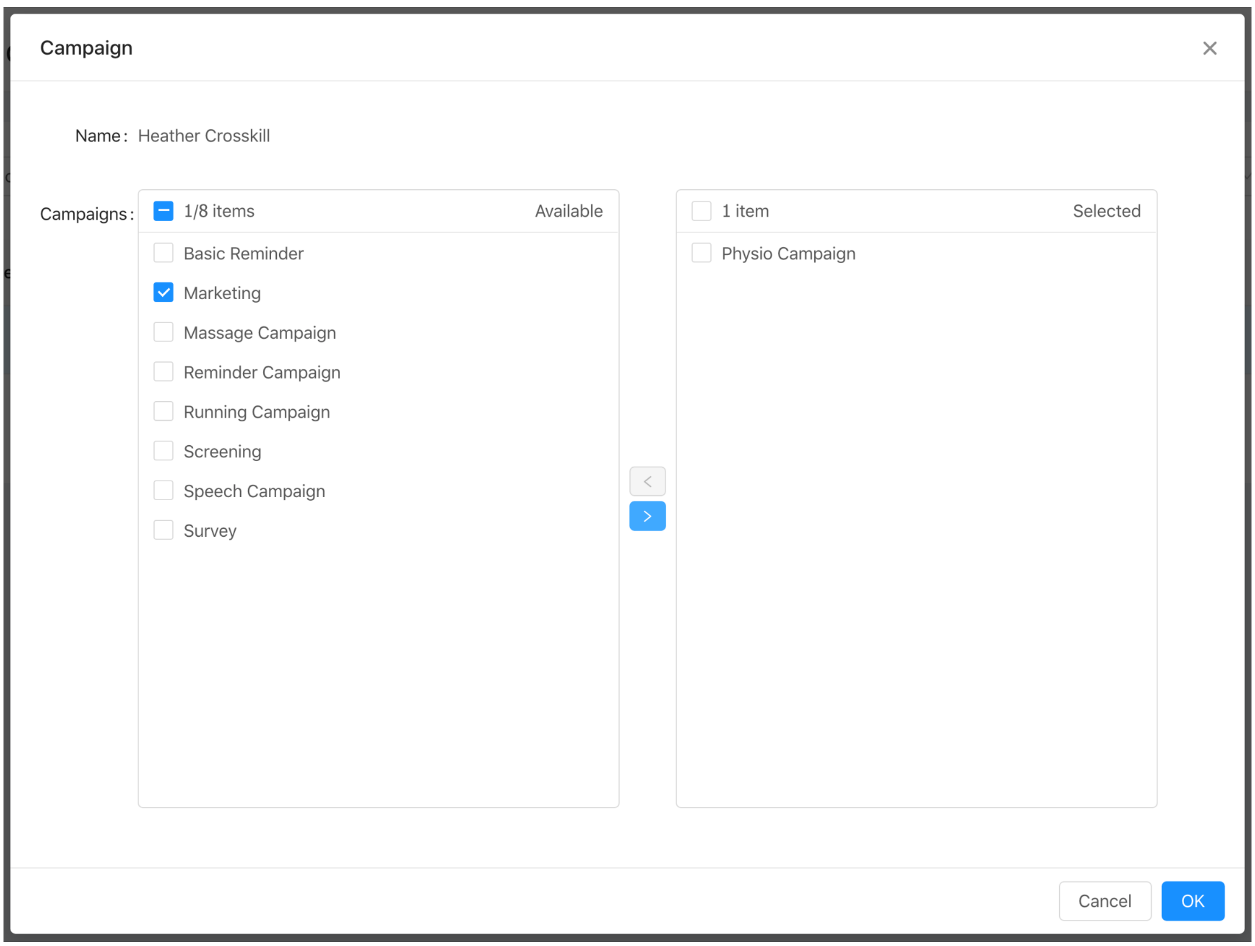
7.3. Applying Campaigns Individually

Campaigns can be applied to individual clients in the Messages screen. This is helpful when you have a Campaign containing unique messages for specific clients.

To apply a Campaign to an individual client, click Edit in the Campaign Column.



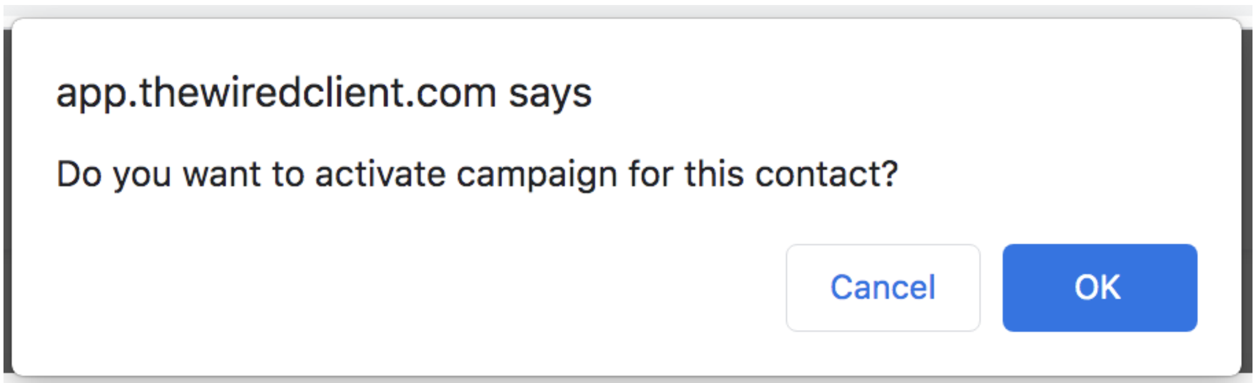
The following panel will appear:



On the left, you will see a list of all of the **Available Campaigns**. These are Campaigns which have not yet been assigned to the client.

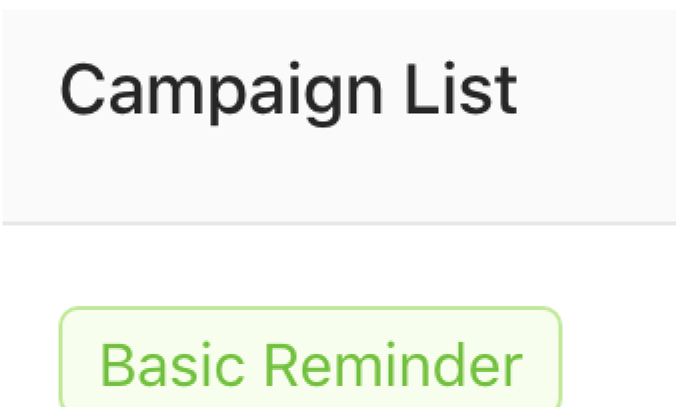
To assign the Campaign to the client, flag the Campaign on the left and use the arrow in the middle to move it to the right (i.e. **Selected Campaigns**). Click OK to save your Selected Campaigns.

Note: If this is your first time applying a Campaign to this patient, the following panel may appear.



Click **OK** to Activate the Campaign, enabling the client to receive the Events within.

Once the Campaign has been assigned to the client, it will appear green in the Campaign List column, pictured below.

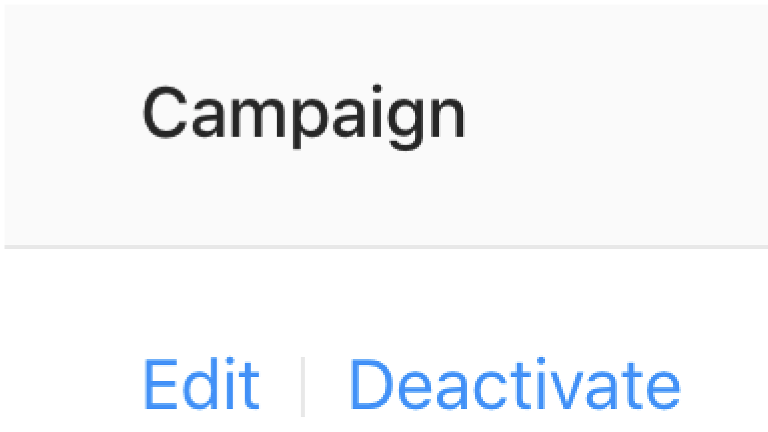


7.4. Deactivating/Removing Campaigns Individually

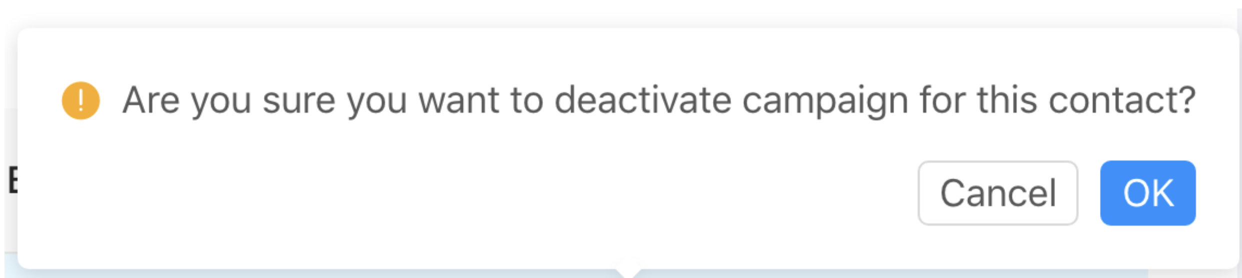
There are three ways to prevent a client from receiving messages, as follows:

- **Deactivating the Campaign**

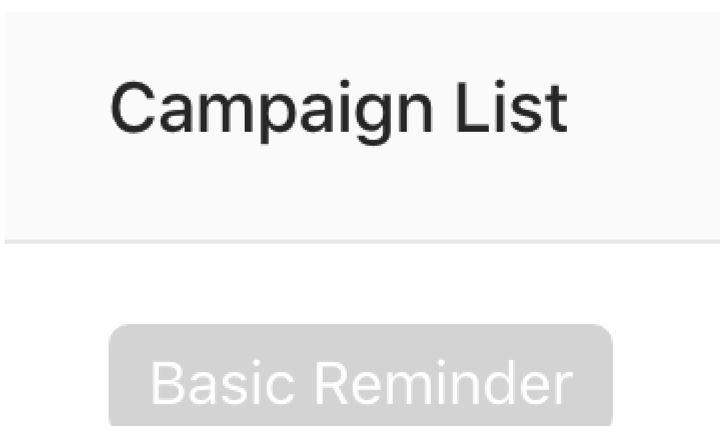
You may click **Deactivate** in the Campaign column to deactivate the Campaign.



The following panel will appear:



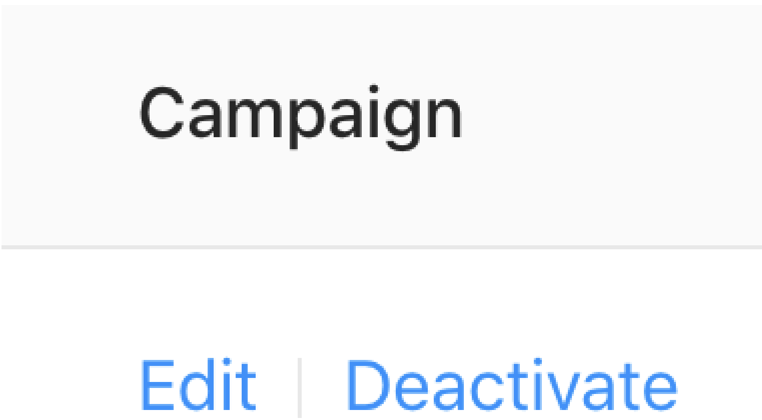
Click **OK** and the Campaign(s) assigned to them (visible in the Campaign List column) will turn from green to grey--indicating that they've been deactivated. Events within a Deactivated Campaign will not be triggered for this client.



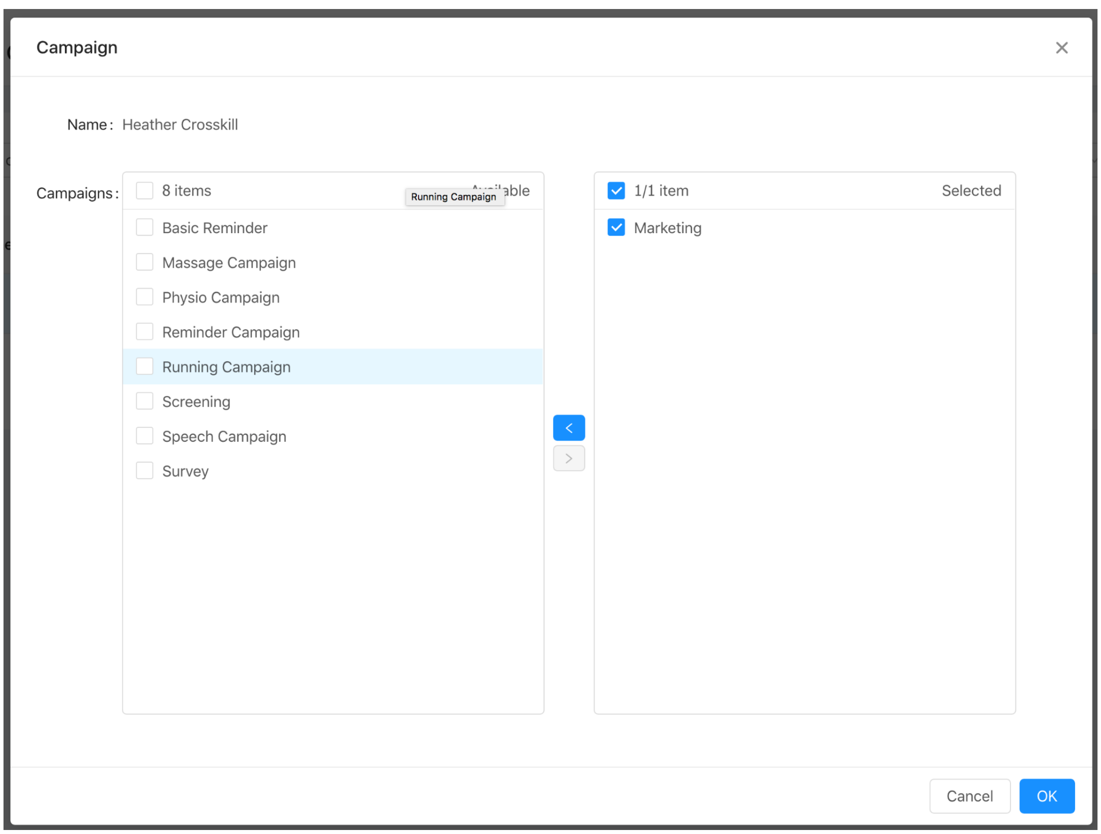
- **Removing the Campaign**

Similar to assigning a Campaign to an individual client, you may remove a Campaign from an individual client by doing the reverse.

To remove a Campaign from an individual client, click Edit in the Campaign Column.



The following panel will appear:



On the right, you will see a list of all of the **Selected Campaigns**. These are Campaigns that are assigned to the client.

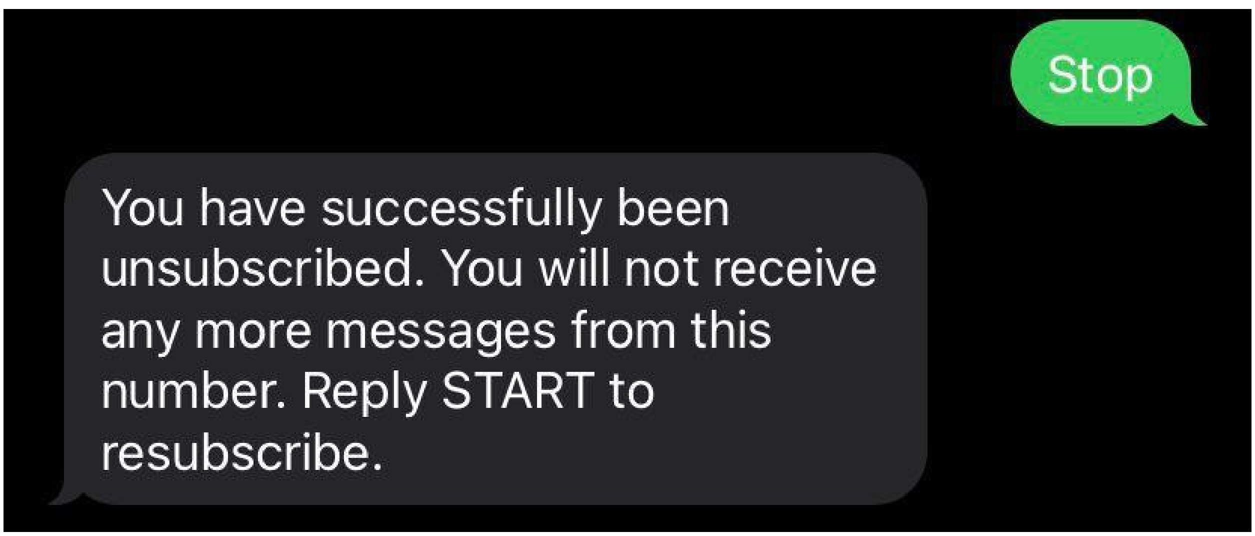
To remove the Campaign to the client, flag the Campaign on the right and use the arrow in the middle to move it to the left (i.e. **Available Campaigns**). Click OK to save your changes.

- **Self Unsubscribe**

A client can unsubscribe themselves from Wired Client by sending a message to your Branch SMS # with one of the following words: **stop, cancel,** or **unsubscribe**.

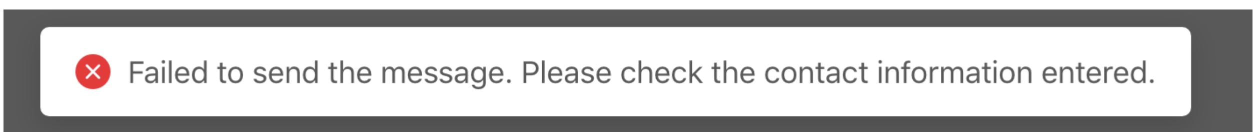
Upon doing so, the user is notified the same way they would be if they received any other incoming messages.

The client will receive an auto reply confirming that they are unsubscribed.



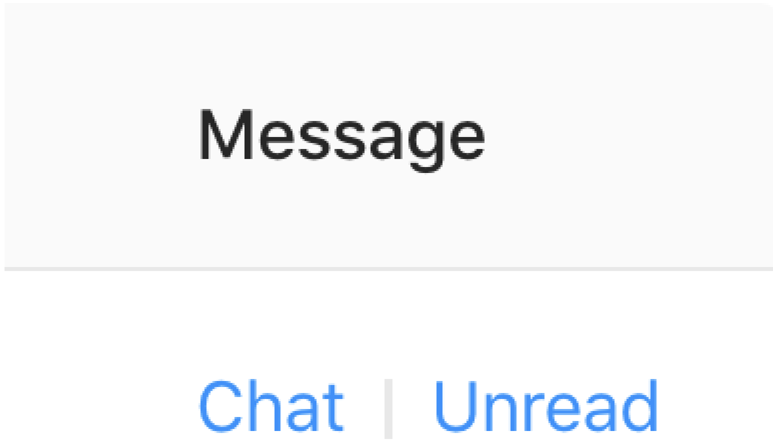
It also notifies them that they must reply to the message with the word **start** to resume receiving messages.

Note: If a client has self unsubscribed, you will not be able to send them any messages through Wired Client. The following error message will appear when attempting to do so.



7.5. Marking Messages as Unread

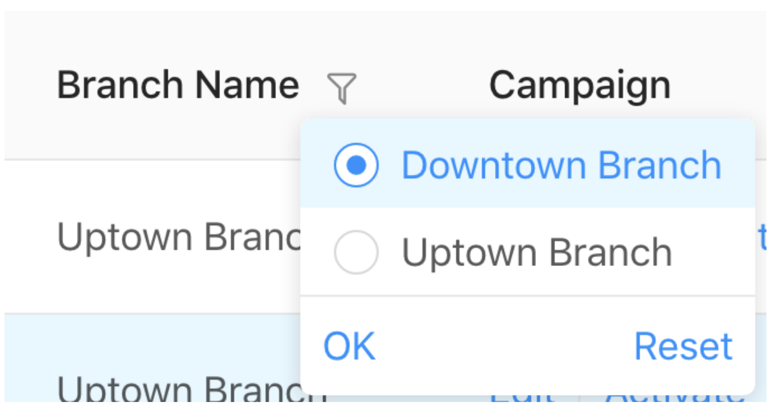
Messages can be marked **Unread**. To do so, click **Unread** in the **Message** column.



This restores the red icon over the clients first name, indicating that there's an unread message.

7.6. Viewing A Single Branch

Users can view the Contact List for a single Branch in the Messages screen. To do so, click the filter icon  next to the **Branch Name**. The following window will appear:



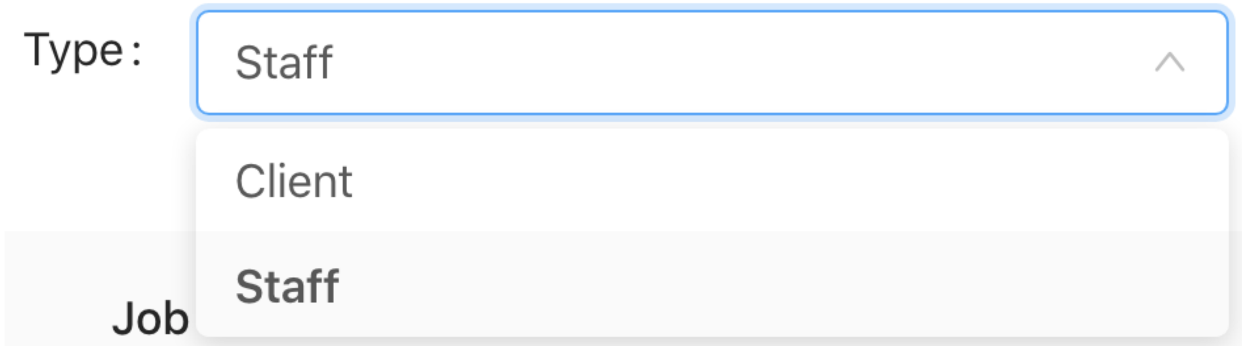
To view the Contact List for a single Branch, check off the circle next to the Branch and click OK.

To revert to the default view, click Reset.

7.7. Staff Messaging

It is possible to send messages to Staff, provided their profile contains a Mobile Number.

To do so, click the dropdown next to 'Type' and choose 'Staff'.

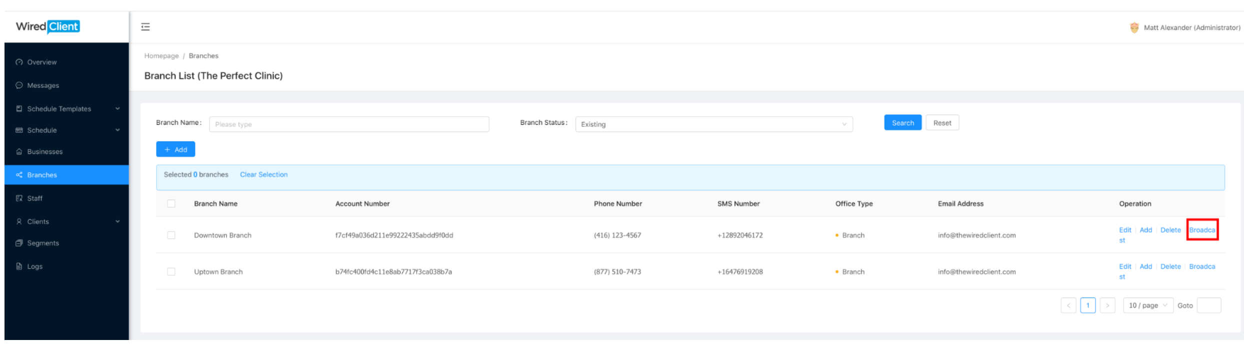


A list of your Staff will appear. Any Staff who have a Mobile Number can be messaged by clicking 'Chat' on the far right. Their responses will also appear here.

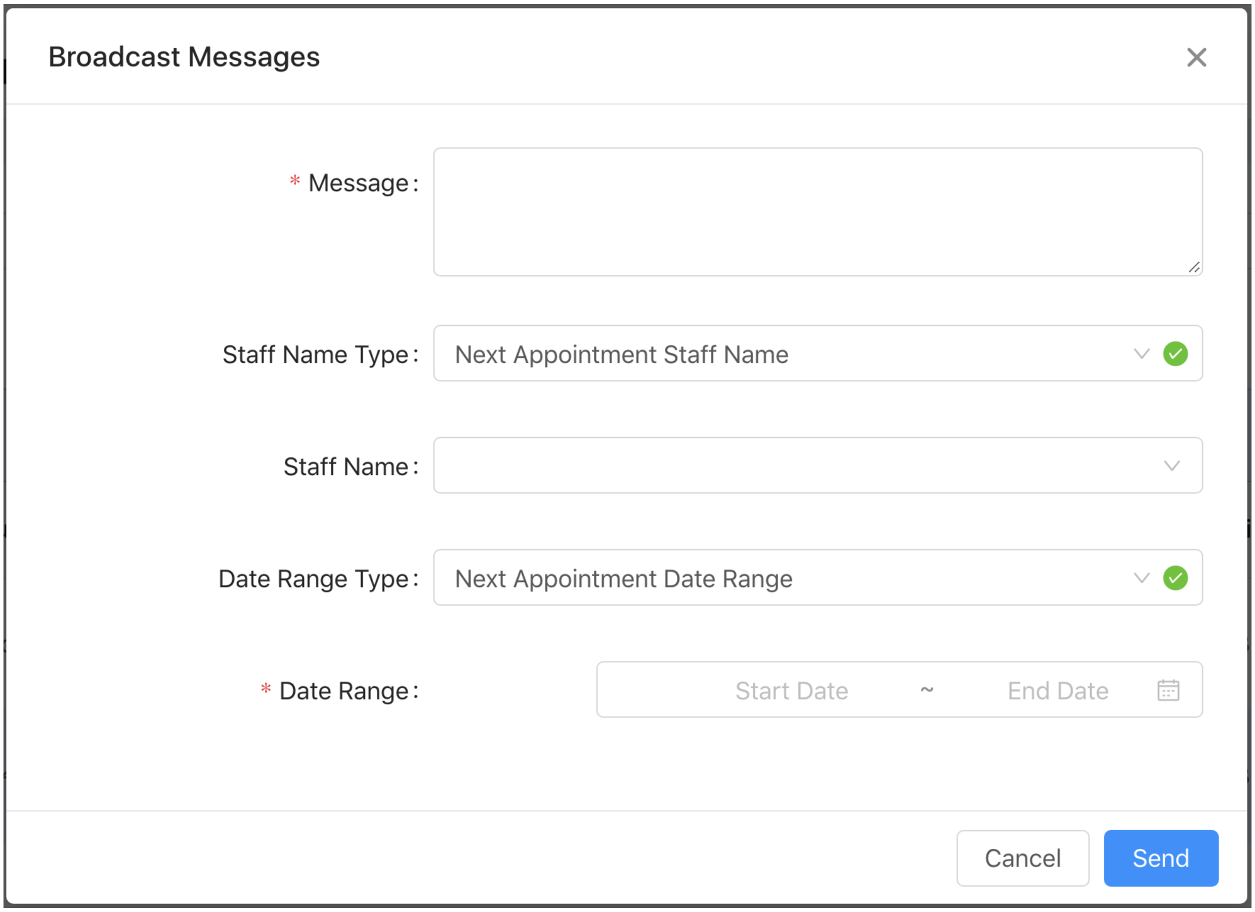
7.8. Broadcast Messages

Broadcast Messages are by far the most effective way to reach a group of clients scheduled on a particular day, or with a particular Staff member. For example, it might be a snow day, or the Staff member is out sick, and you want to send a message for a given date range--your best way to do so is by sending a Broadcast.

To send a Broadcast, navigate to the Branches. Click Broadcast on the far right.



The following panel will appear:



The fields work as follows:

- **Message:** Type the message that you wish to broadcast to your clients. Note that you are unable to use Tokens in your Broadcast (i.e. ${clientFirstName}).

- **Staff Name Type:** Define the type of Staff Member for whom you are filtering this message. It will default to **Next Appointment Staff Name**, which refers to staff members with whom the client is scheduled.

  If you make a selection in the **Staff Name** field, the message will be filtered to only be sent to clients to whom the staff member is assigned (see section 3.2).

  Note: If you leave the Staff Name field blank, the message will be sent to all clients regardless of the staff member with whom they are scheduled, or to whom they are assigned.

- **Staff Name:** Choose the staff member to whom this message is relevant. If you wish the message to be sent to all clients scheduled within the specified Date Range, you may leave this field blank.

- **Date Range Type:** Choose whether the Broadcast will be sent based on the Next Appointment Date Range, or the Last Visit Date Range.

  When using the Next Appointment Date Range, the Broadcast will be sent to any clients who have a pending appointment within the specified date range.

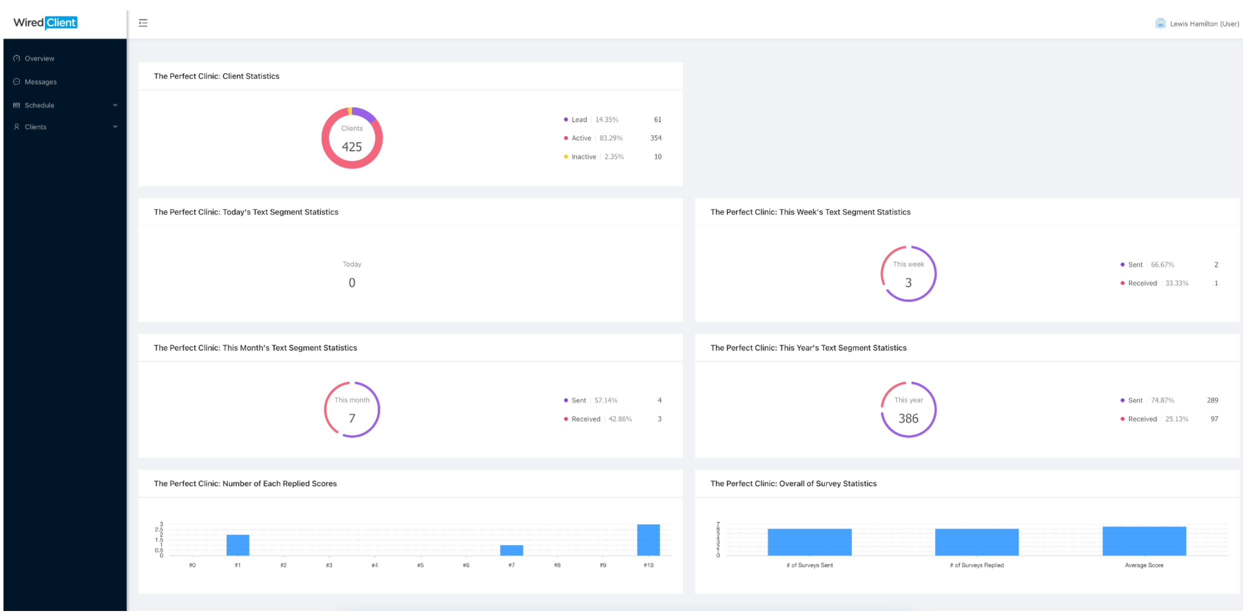
  When using the Last Visit Date Range, the Broadcast will be sent to any clients whose last appointment was within the specified date range.

- **Date Range:** Choose the date range of the pending or past appointments (determined by the Date Range Type). The message will be sent to the clients whose appointments fall within the date range.

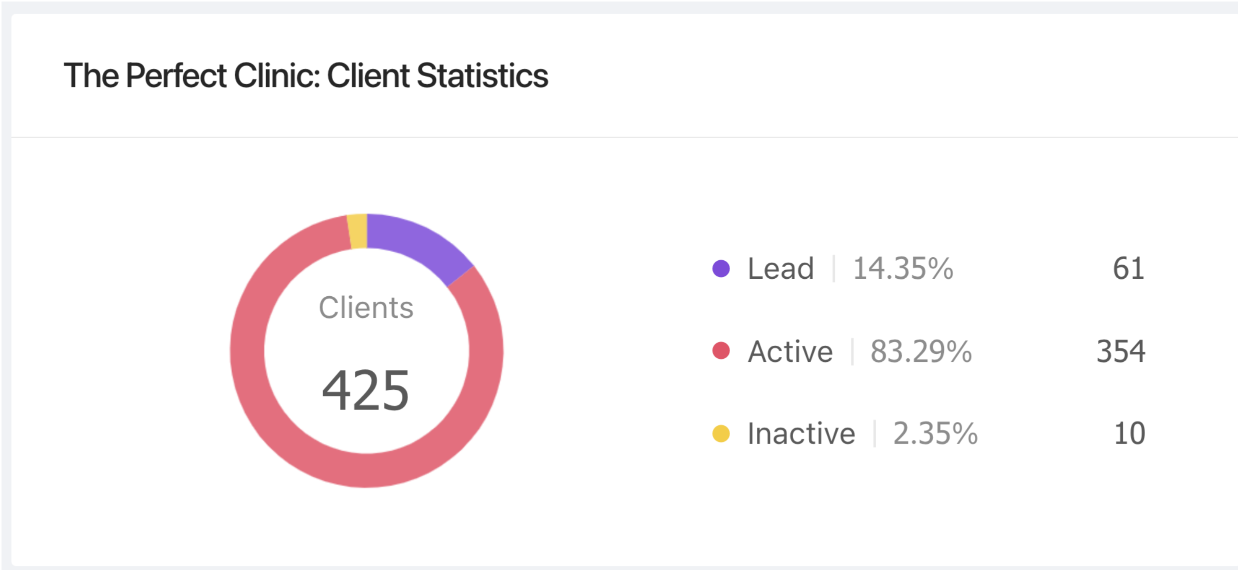
  Note: To send a Broadcast to clients who are/were scheduled on a single day, you may choose the same date twice (i.e. June 24 to June 24).

8. Overview

The Overview is a helpful tool that provides you with a snapshot of your Wired Client usage. It is also the first screen that you see upon logging in to Wired Client. It works as follows.

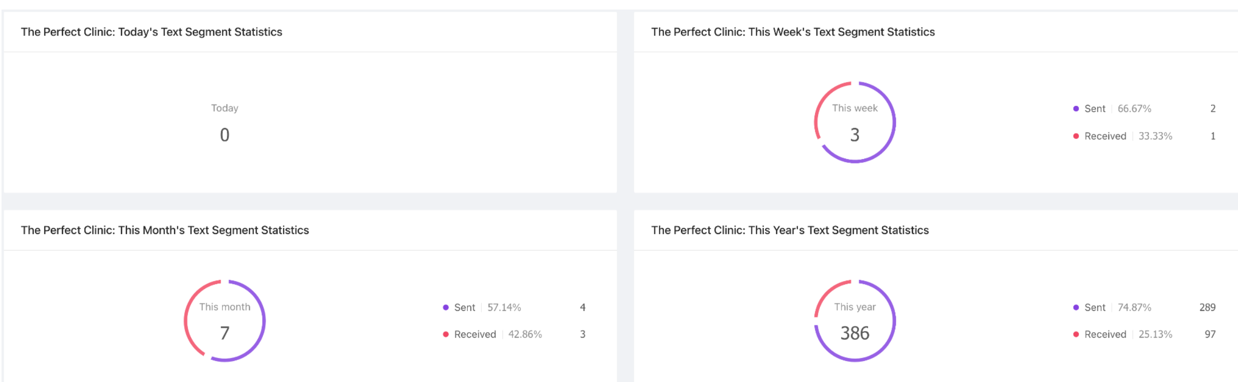


8.1. Client Statistics



The Client Statistics chart provides you with a breakdown of the total clients who have been either uploaded to or created in Wired Client. The clients are divided into three categories: Leads, Active Clients, and Inactive Clients (discussed in Section 3.0).

8.2. Text Message Segment Statistics

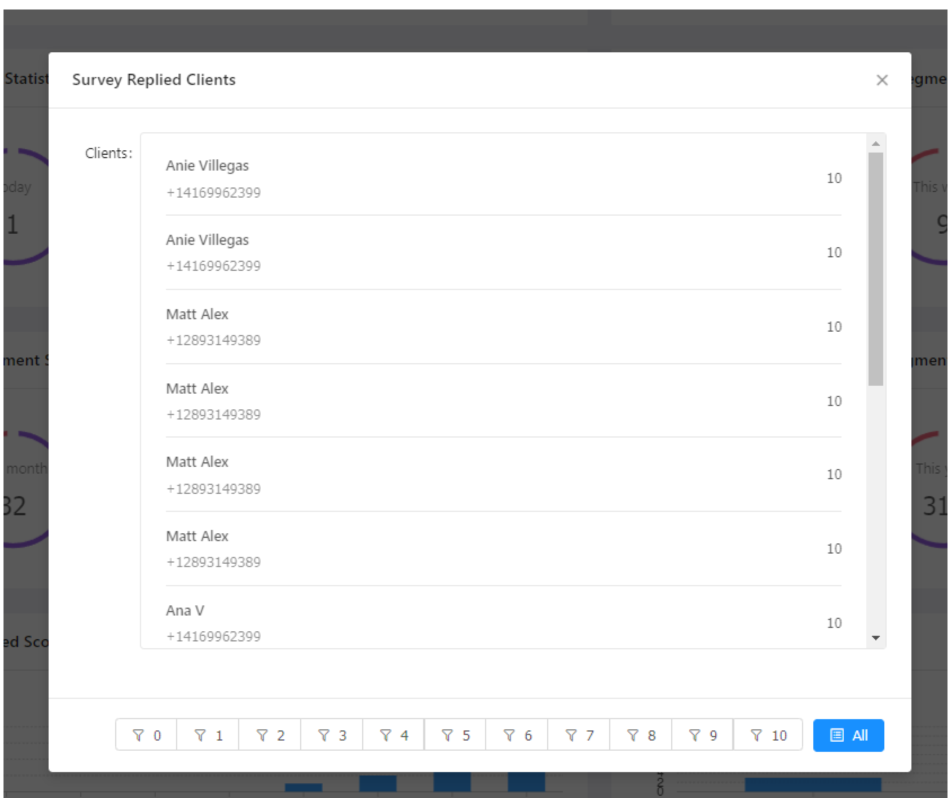


The Text Message Segment Statistics provide you with a breakdown of the total number of text message segments Sent from (outgoing) and Received by (incoming) your account. They are divided into daily, weekly, monthly, and yearly totals.

8.3. Survey Statistics

The Survey Statistics provide you with some basic details about your survey results. The chart of the left, Number of Each Replied Scores, shows you how many responses you've received for each score. The chart on the right, Overall Survey Statistics, tells you the # of Surveys Sent, the # of Surveys Replied, and the Average Score of all respondents.

You may also select 'View Survey Replies' to view the specific responses you've received from clients, and filter them by score.

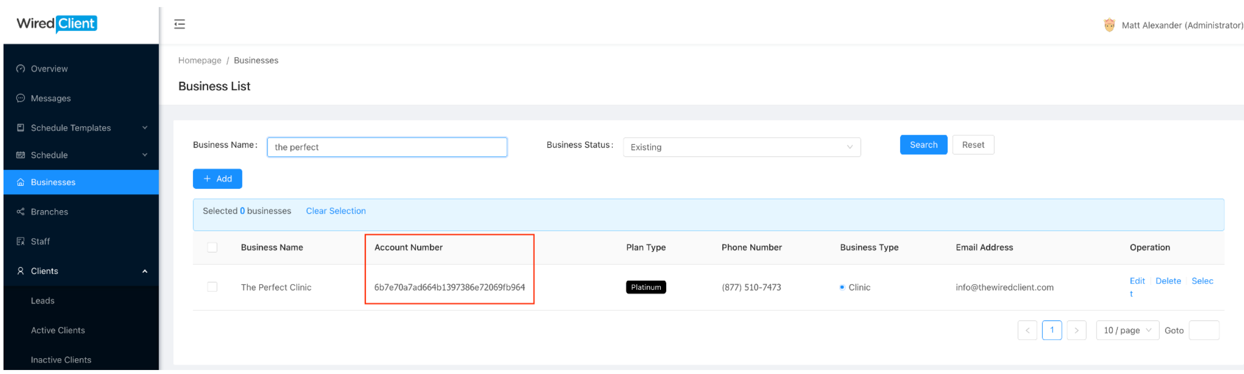


9. Practice Perfect API

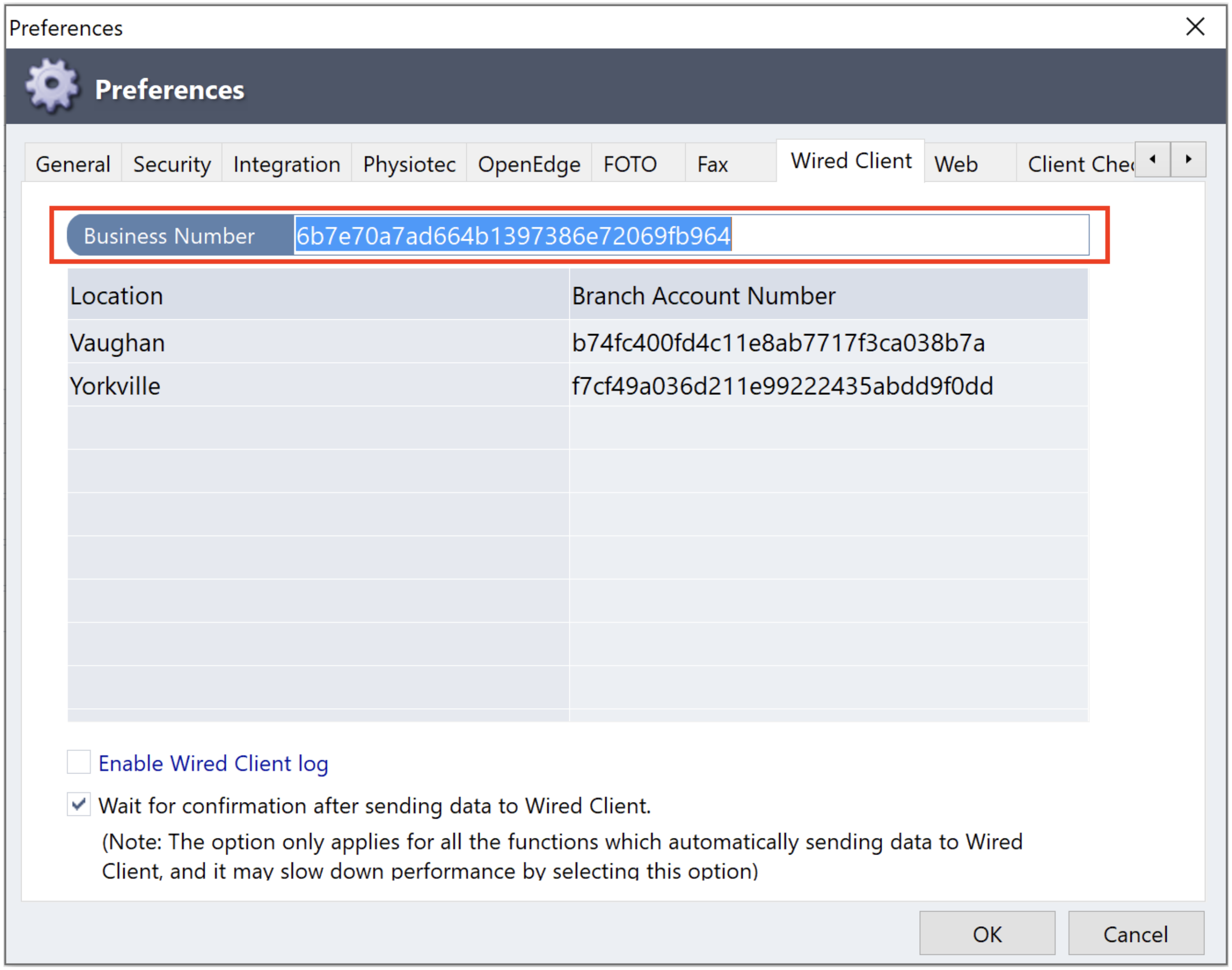
Practice Perfect and Wired Client are integrated through an Application Programming Interface (API). The API enables Practice Perfect to continuously update Client profiles in Wired Client while maintaining an active internet connection. It ensures that messages are sent in a timely manner, and contain the most up-to-date client data.

9.1. Business Account Number

Each account in Wired Client has a unique Business Number. Generally, a user will have one Business Number for each Practice Perfect database they manage. Business Account Number can be found on the Businesses page. They are only visible to administrators.

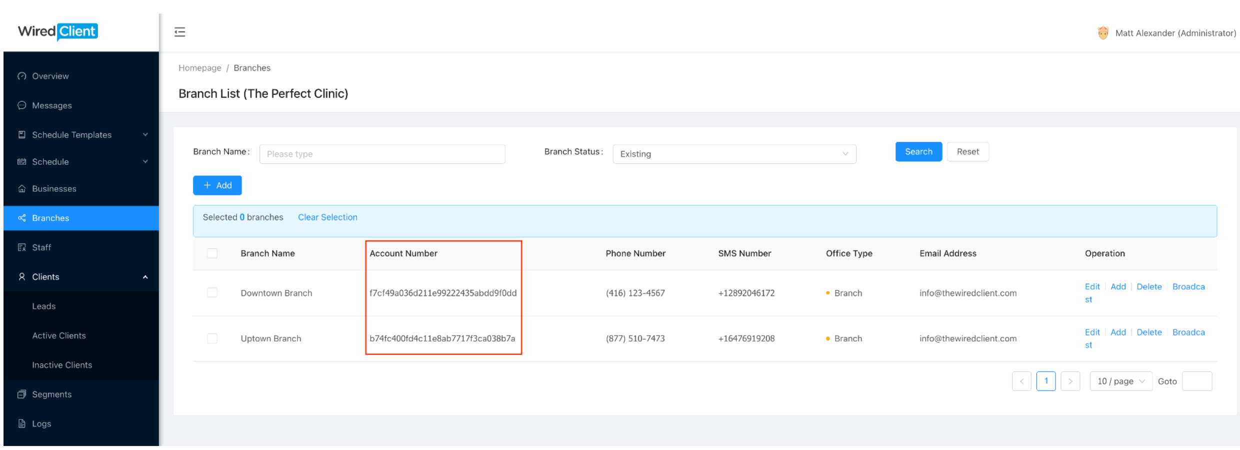


The Business Account Number must then be entered into the client's copy of Practice Perfect in the corresponding field. These settings can be found by selecting Settings>Other Settings>Wired Client. It is a global setting--when entered on one workstation, it will be associated with all workstations.

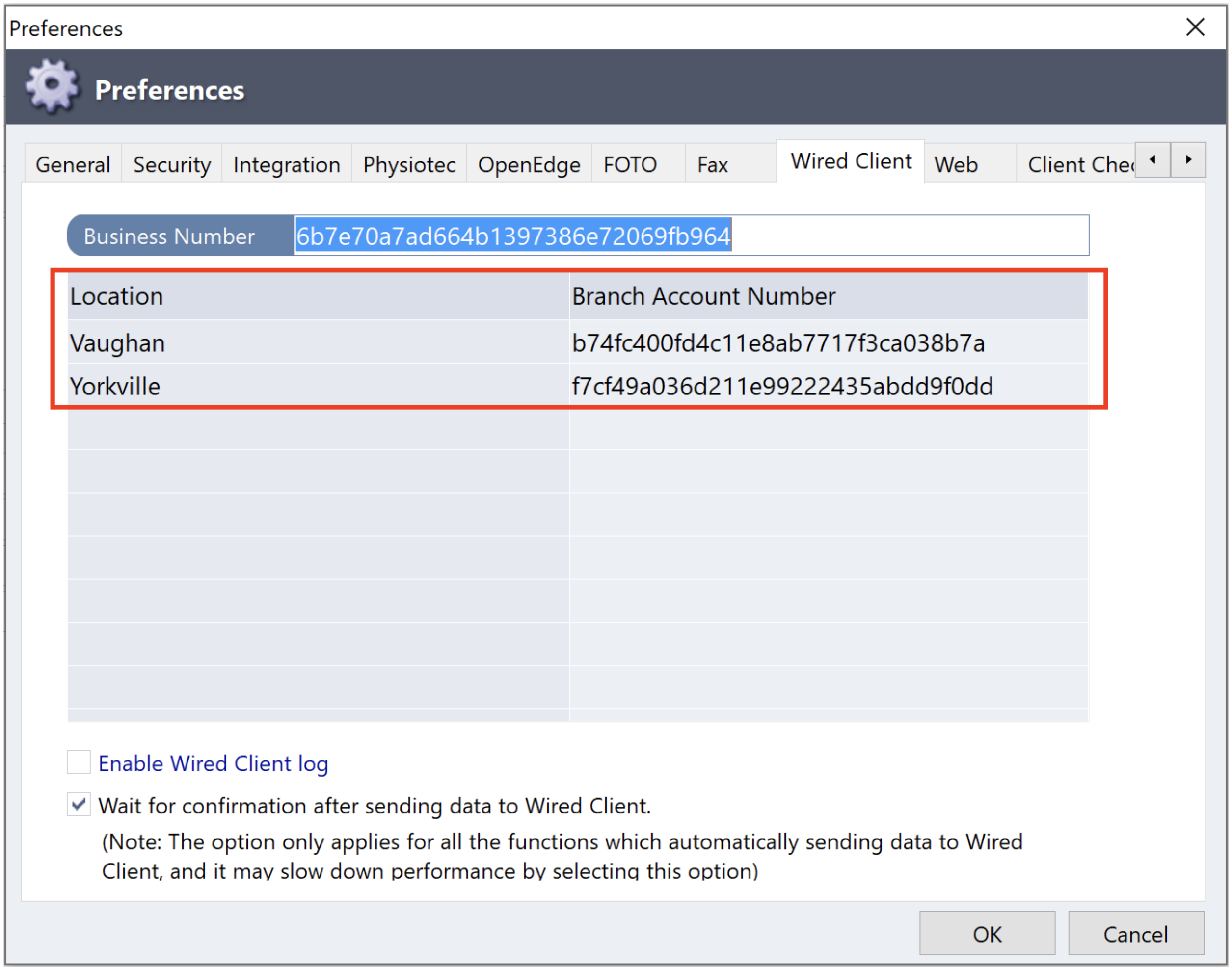


9.2. Branch Account Number

Each Business Account in Wired Client will have at least one Branch. In the event that a business has more than one office location, there may be multiple Branches on the account. The Branch Account Number can be found on the Branches page. They are visible to all users.



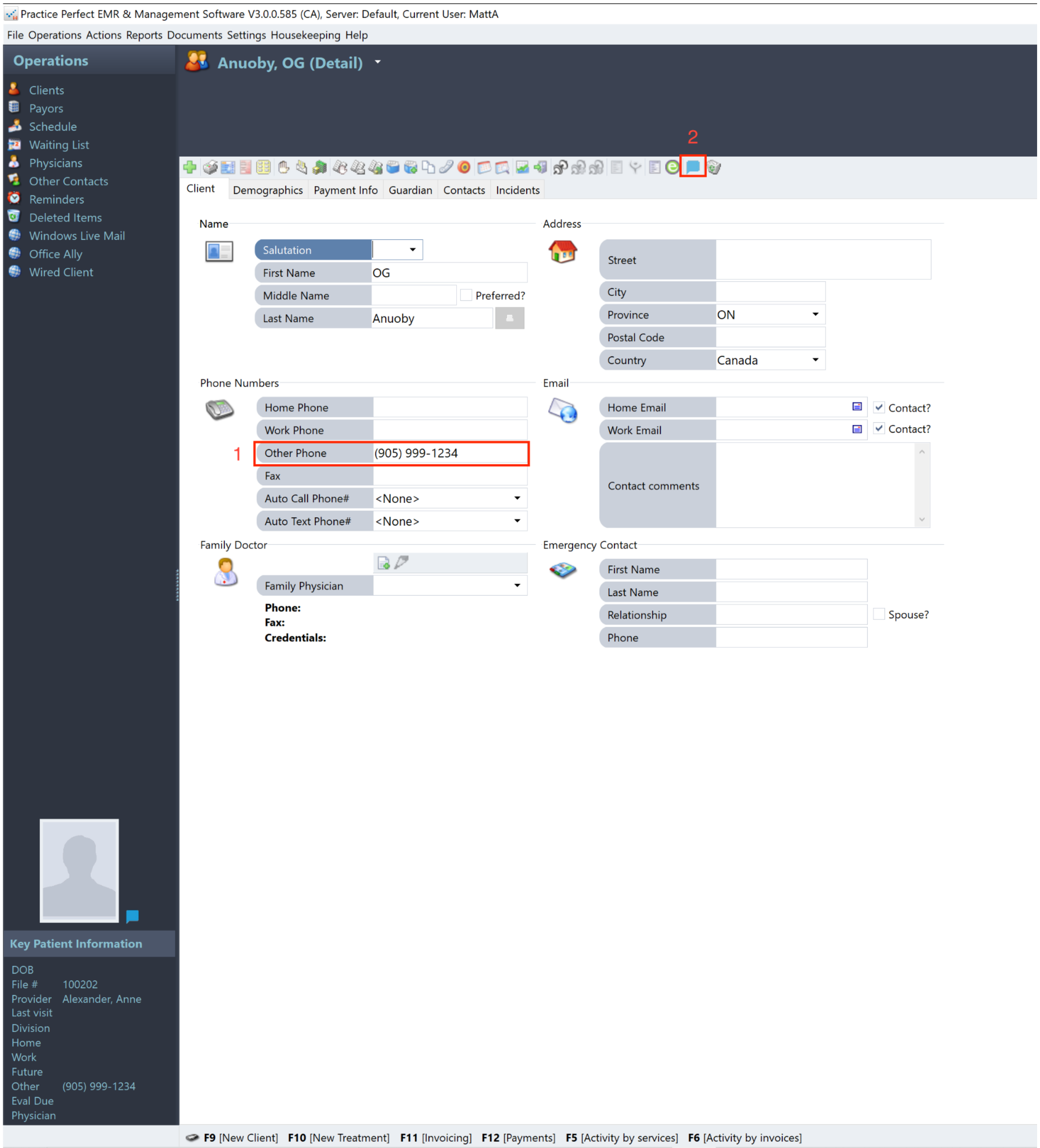
The Branch Account Number(s) must be entered into Practice Perfect in the corresponding field. These settings can be found by selecting Settings>Other Settings>Wired Client. It is a global setting--when entered on one workstation, it will be associated with all workstations.



9.3. Creating Client Profiles via API

Creating Client Profiles via the API represents the bulk of the setup. Fortunately, Campaigns can be automatically assigned to newly created clients, ensuring that following the steps below initiates a chain of Events.

To begin, enter a Client's Profile in Practice Perfect.

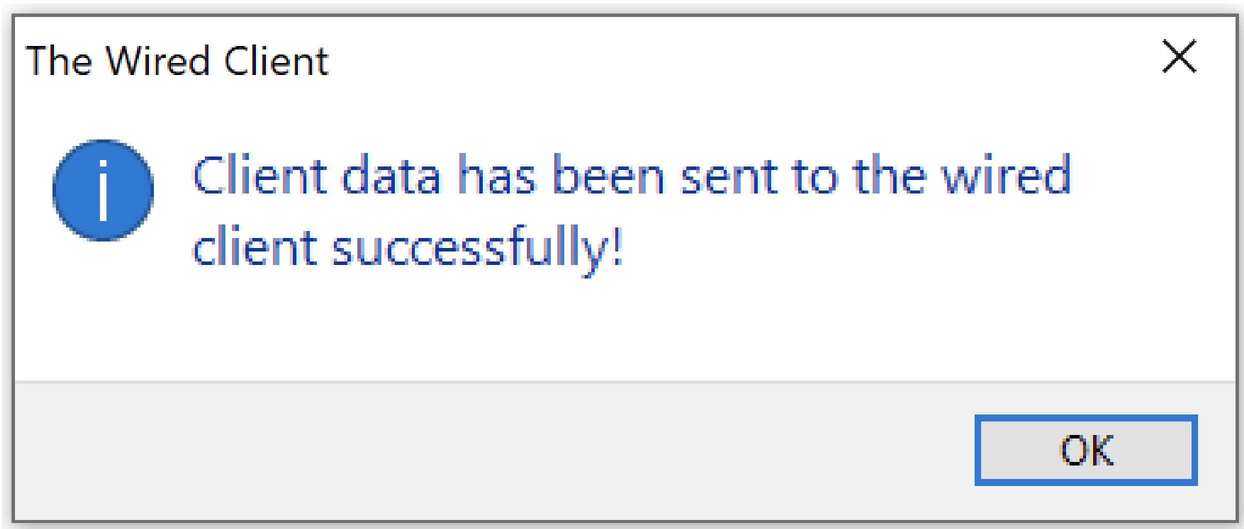


There are two things which must be done for a Client's profile to be uploaded to Wired Client:

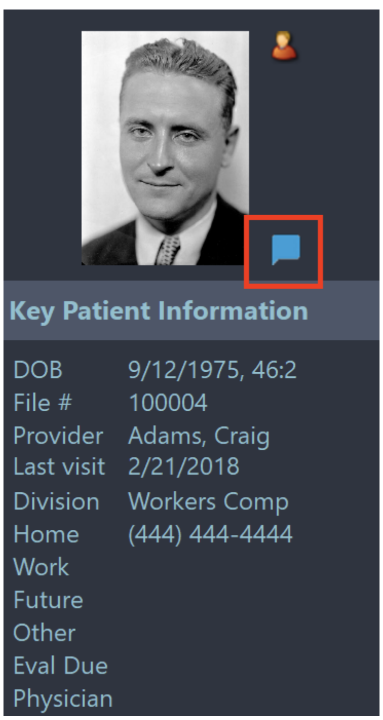
3) The Client must have a mobile phone number entered in the **Other Phone** field.

4) Click the **Wired Client Button** on the **Function Bar** to send the provider's data to Wired Client.

Upon sending the Client to Wired Client for the first time, the following dialogue box will appear.

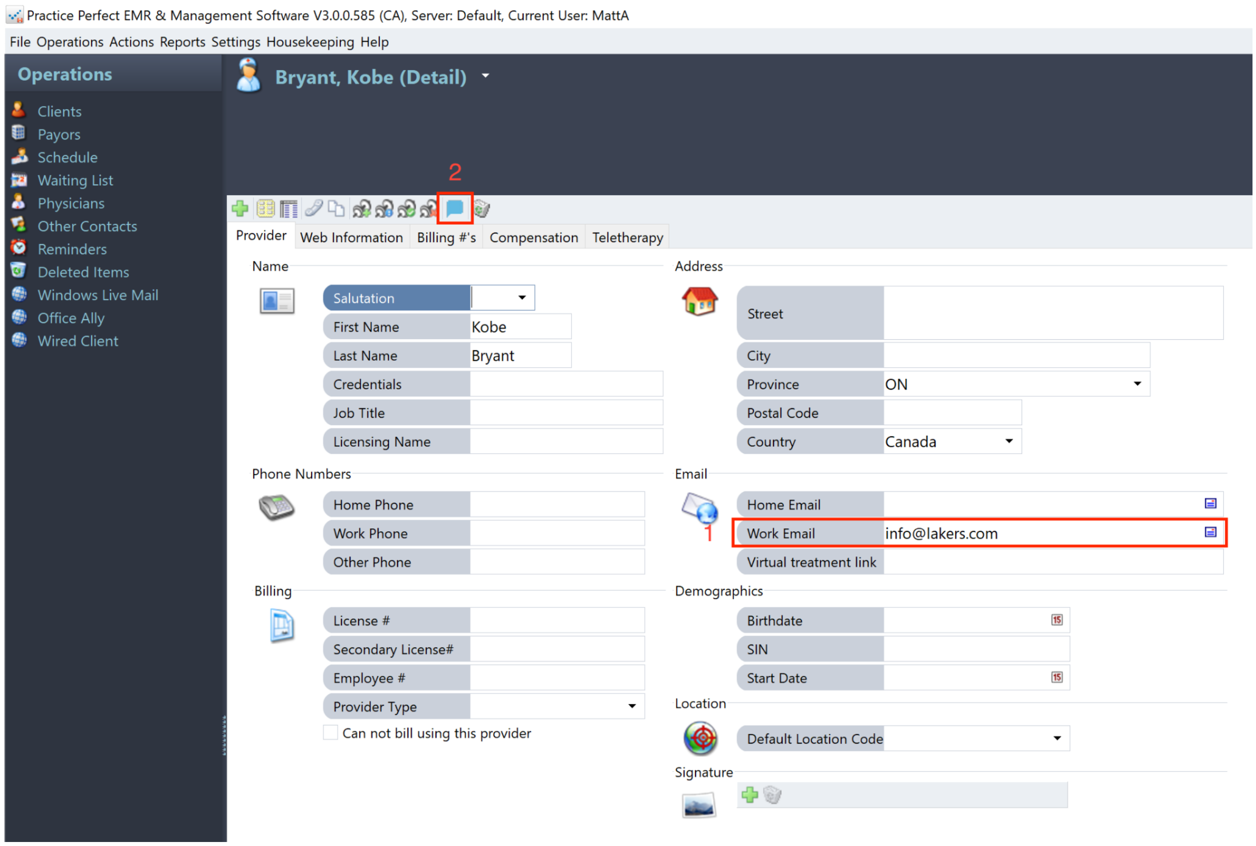


A Wired Client icon will also appear next to the client's portrait in the **Key Patient Information** section of the left-hand sidebar. It will begin appearing in their appointment cells, as well (discussed in Section 9.5).



9.4. Creating Staff Profiles via API

Creating Staff Accounts via the API is a very simple process. To begin, select *Housekeeping>Contacts>Providers.* Double-click a Provider's profile to reveal the Detail View.

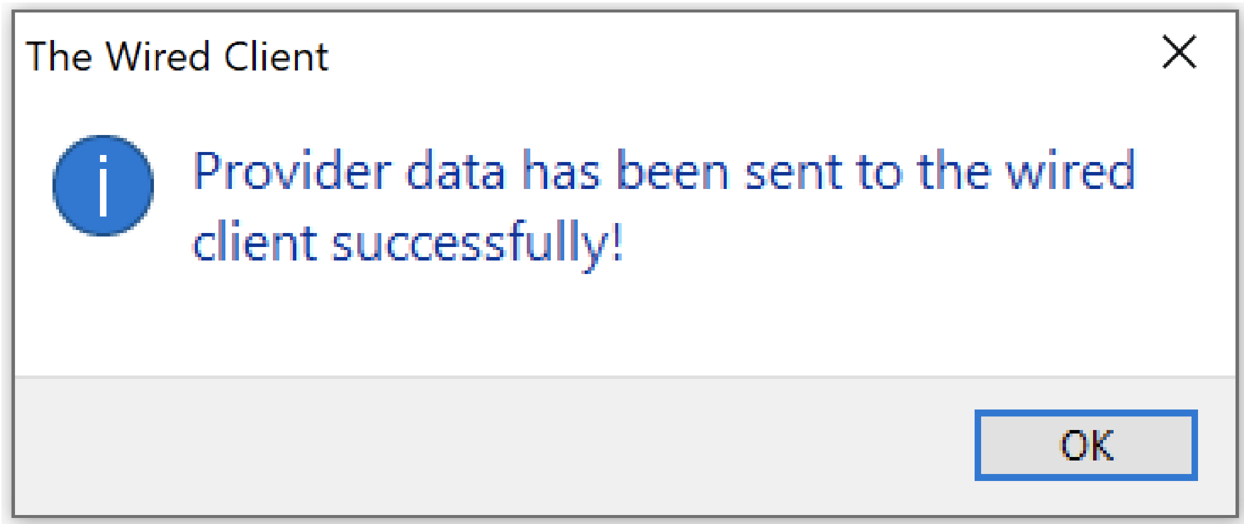


There are two things which must be done for a Provider's profile to be uploaded to Wired Client:

1) You must ensure that the Provider has a **Work Email**. For example, if the Provider does not have a personal Work Email, you may use the general inbox for your facility (i.e. info@yourclinic.com).

2) Click the **Wired Client Button** on the **Function Bar** to send the provider's data to Wired Client.

Upon sending the Provider data to Wired Client for the first time, the following dialogue box will appear.



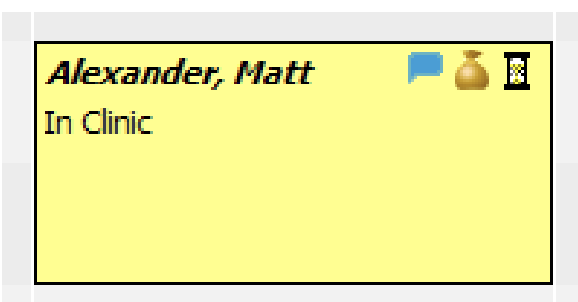
Please note that a **Provider's Staff Account** must be **Enabled** in Wired Client (discussed in Section 2.4) before they are able to login. Furthermore, none of the information entered in their **Provider Profile** (in Practice Perfect) or their **Staff Account** (in Wired Client) will be shared with your clients. It is for internal purposes only.

The main reason for creating **Staff Accounts** for your Providers is so that their name can be included in messages. For example, if you want to include the name of the Provider by whom the client will be treated, their **Provider Profile** must be uploaded to Wired Client from Practice Perfect. They cannot be created in Wired Client exclusively, otherwise their Practice Perfect **Provider Profile** (i.e. their schedule) and their Wired Client **Staff Account** will not be synced.

In addition, users may send a Broadcast based on the staff member with whom the clients are scheduled. For example, if a staff member is taking a sick day, you may want to send a Broadcast to all of the clients with whom they're scheduled.

9.5. Wired Client Icon on Scheduler

When a Client is uploaded to Wired Client, a Wired Client icon will begin appearing in their Appointment Cell--pictured below.



The Wired Client Icon in the Appointment Cell indicates that this specific appointment has been uploaded to Wired Client, and appears in the 'Pending Appointments' tab of their profile. It also indicates that a reminder will be sent for this appointment, provided it was uploaded prior to the Event's cut off time (e.g. 9 am the day before the appointment). It does not, however, indicate that the reminder has been sent--only that this particular Appointment was uploaded to Wired Client.

In the current iteration of our API, **three pending appointments are uploaded from Practice Perfect to Wired Client**. For example, if a client is booked everyday from Monday to Thursday, then only Monday to Wednesday's appointments will be uploaded to Wired Client. When Monday's appointment is marked *Complete* in the Scheduler, then Tuesday to Thursday will be uploaded to Wired Client.

Note: An existing client's profile will be updated in Wired Client in one of two ways:

1) A change is made in the Scheduler. Whether it's booking, editing, or changing an appointment status, doing something with the client's profile in the Scheduler prompts Practice Perfect to send updated appointment information to Wired Client.

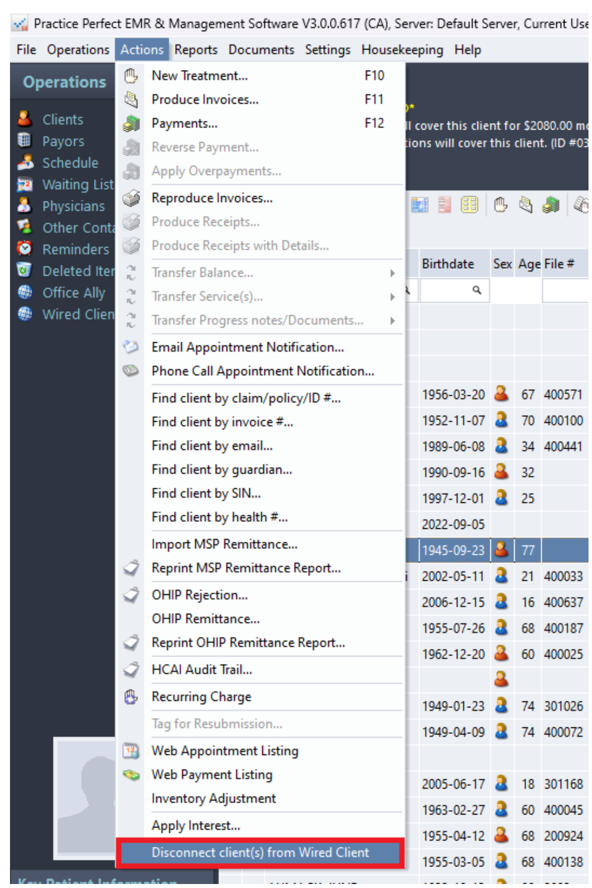
2) Press the Wired Client icon again. Rather than creating a new profile, it will simply update it.

9.6. Disconnecting Client Profiles via API

Client Profiles in Practice Perfect can be disconnected from their respective profile in Wired Client via the API. Doing so will cease to update their profile in Wired Client (i.e. add new Pending Appointments, update # of Visits, etc.). However, the **Client Profile** in Wired Client will continue to receive messages as long as the **Campaign** assigned to them remains active. You may also **Deactivate** the **Campaign** assigned to the client in Wired Client, or **Delete** their Wired Client profile, to prevent further messages from being sent.

To disconnect a client's Practice Perfect profile from their Wired Client profile, either flag the client(s) from the Client listing screen, or enter a Client Profile. Select **Actions>Disconnect client(s) from Wired Client.**

After disconnecting a Client profile from Wired Client, the Wired Client icon will no longer appear in the **Key Patient Information** section when the Client is selected, or in the **Appointment Cell** on the Scheduler.

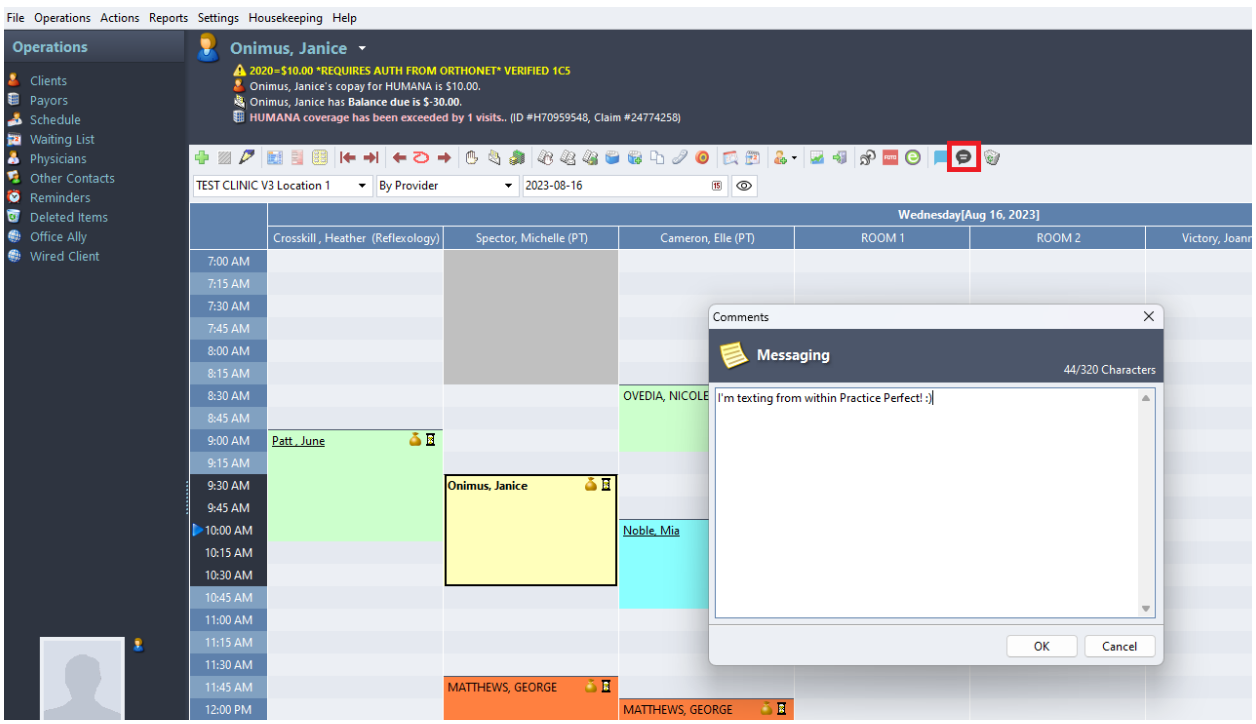


9.7. Instant Messaging via API

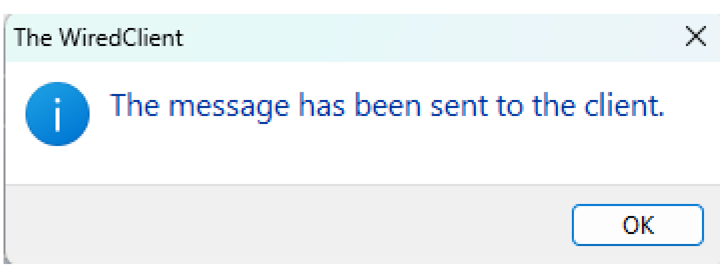
In later Practice Perfect releases, users have the ability to send instant messages to Clients and Staff from directly within Practice Perfect. This feature can be accessed in either:

- A Client Profile
- The Scheduler
- A Provider Profile (Housekeeping>Contacts>Providers)

Once the Client has been selected, you may click the grey chat bubble on the **Function Bar**. The following panel will appear:



After typing the message, click OK. There is currently a limit of 320 characters. The following dialogue box will appear:



The message will be visible in the Client's chat log in Wired Client afterwards (i.e. the Messages screen).