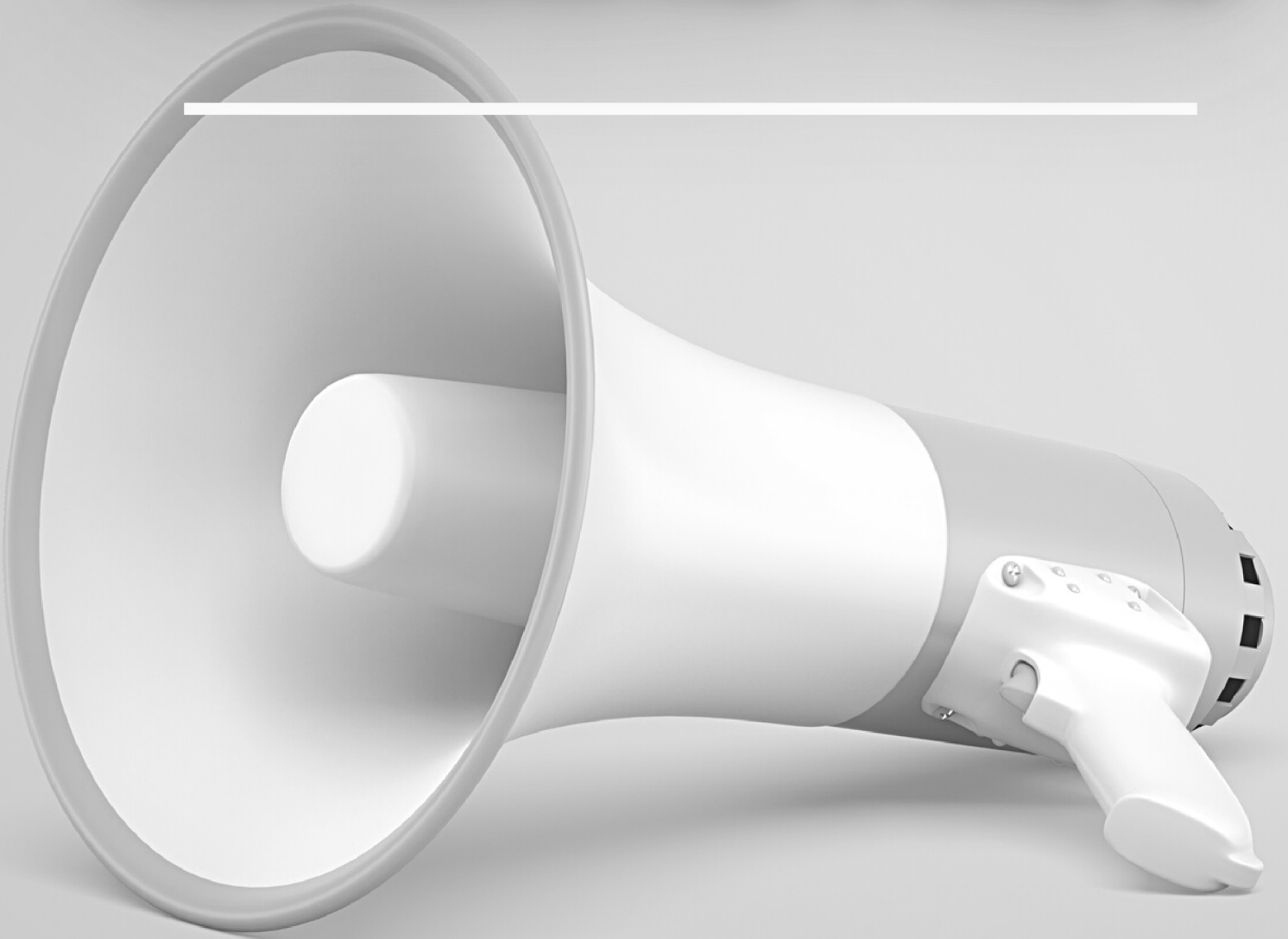


MARKETING



BUSINESS MODEL SOFTWARE


+healthTrust
SOFTWARE

Marketing: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to efficiently manage the marketing functions in the software. The sequence of courses can be changed based on training needs; however the content of each course should remain as stated.

Recommended Course Attendees: Owners, HR, Administrators, and any other Upper Level Management

Estimated Duration: 1 hour 30 minutes

TOPIC	DESCRIPTION	
Create a Campaign	Learn how to create a marketing campaign using the system	20 Minutes
Integrations: Domain	Learn how to integrate your website domain into the system	10 Minutes
Integration: Claims Clearinghouse	Learn how to integrate your claims clearinghouse into the system	30 Minutes
Integrations: Email	Learn how to integrate your email system into the GL system	10 Minutes
Integrations: Fax	Learn how to integrate your fax system into the GL system	10 Minutes
Integrations: Phone	Learn how to integrate your phone system into the GL system	10 Minutes

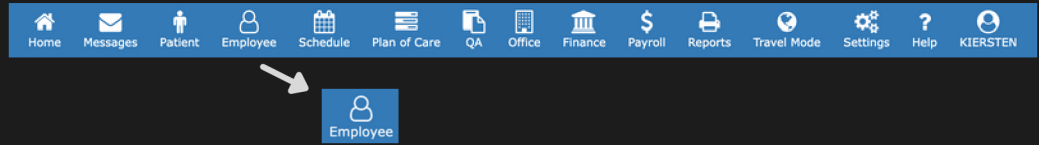


Create a Campaign

1

Go to 'Employee' Tab

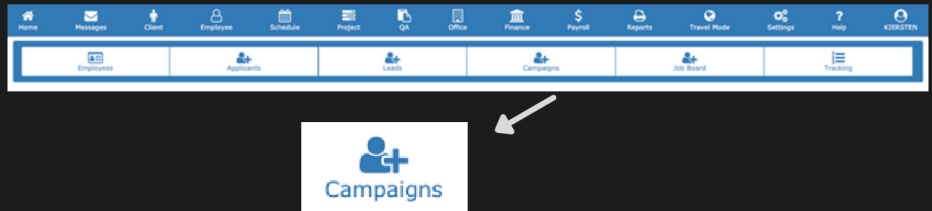
- On your home page, click the 'Employee' tab at the top tool bar



2

Go to Campaigns Section

- Click "Campaigns" in the sub-menu bar.



3

Add a New Campaign

- Click the '+' icon on the far right to the search bar.
- A form will open up.



4

Complete the Form

- Fill out the required fields with the Campaign information.
- Don't forget to click 'Save' on the bottom right of the form.

1.

 A screenshot of the 'Add New Campaign' form. The first step, '1. Name & Type', is active. It contains a 'Name' text field and a 'Campaign Type' dropdown menu.

2.

 A screenshot of the 'Add New Campaign' form. The second step, '2. Assignment', is active. It includes a 'Status' dropdown menu (set to 'ACTIVE'), an 'Assign to' section with 'Employee' and 'Team' options, and 'Status Attribute Default' and 'Job Title' search fields.

3.

 A screenshot of the 'Add New Campaign' form. The third step, '3. Template', is active. It features a 'Form' section with a 'Template' dropdown and a 'Preview Template' button, a 'Title' text field, a 'Subtitle' text field, and a 'Paragraph before form' section with a rich text editor. Below the form is a 'Form fields' section with a 'Show Form' button and a list of fields to include: Name, Title, Email, Salary Range, Other Upload, Last, Job Title, Phone, Message, First, Company, Address, and Resume Upload.

4.

 A screenshot of the 'Add New Campaign' form. The fourth step, '4. After Submission', is active. It shows options for 'On Campaign Submission' (Send to Webpage, Show Message) and 'After campaign Submission' (Send Email, Schedule Event, Send Internal Message), each with a plus icon to expand options.



Integrations: Domain

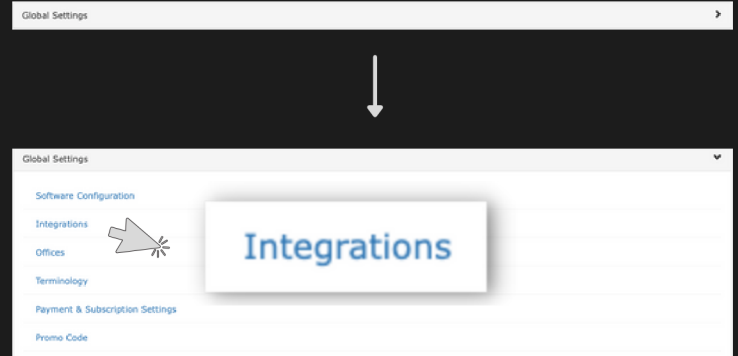
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



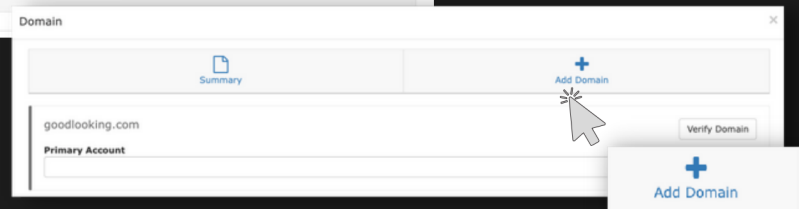
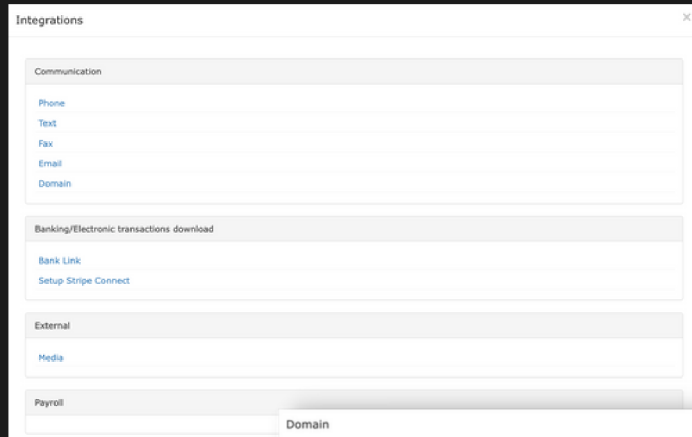
2 Global Settings → Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Click on 'Domain'

- When the Integrations page open, click on the 'Domain' option under Communication.
- A Domain page will open up. Click on 'Add Domain'.



4 Complete the Form

- Fill out the required fields with the domain information.
- Don't forget to click 'Submit' on the bottom right of the form.



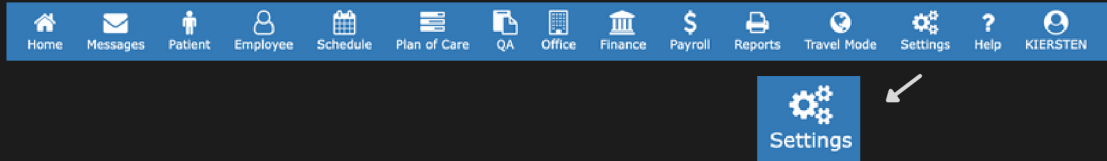
Integrations: Claims Clearinghouse



1

Go to 'Settings' Tab

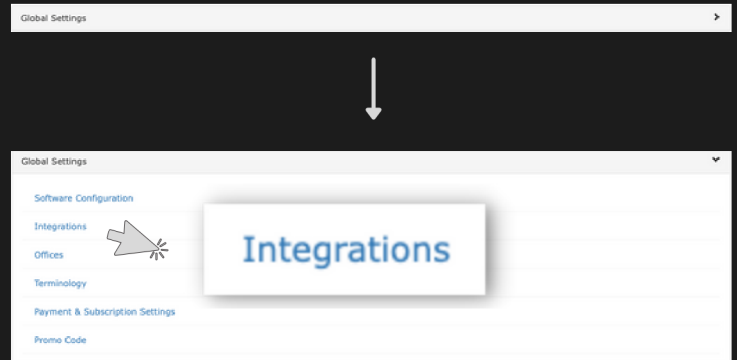
- On your home page, click the 'Settings' tab at the top tool bar.



2

Global Settings → Integrations

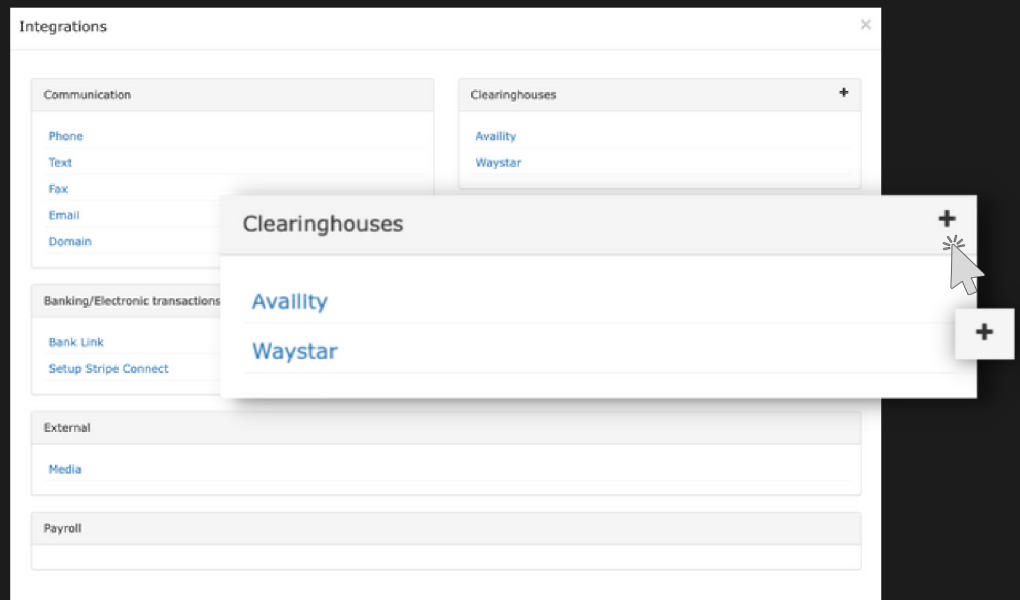
- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3

Add a Clearinghouse

- When the Integrations page opens, click on the '+' to the right of Clearinghouses.
- A form will open.



4

Complete the Form

- Fill out the required fields with the Submitter and Electronic Claims information.
- Don't forget to click 'Submit' on the bottom right of the form.

Clearinghouses

Submitter Information

Code:

Name:

Address 1:

Address 2:

City: State: Zip:

Contact Name:

Phone: Ext:

Fax: Email:

Electronic Claims Information

Integrated Submitter:

ISA06 #: ISA06 Type:

Submitter ID (GS 02): Submitter Primary ID:

FTP ID: FTP Password:

Notes:

Cancel Submit

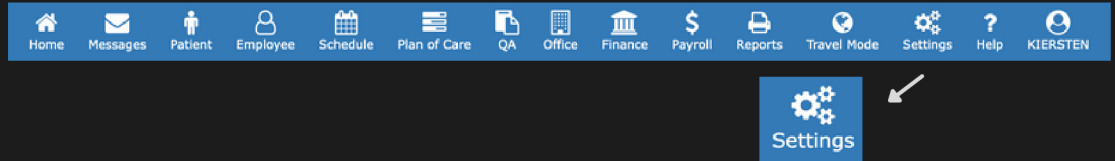
Submit

Integrations: Email



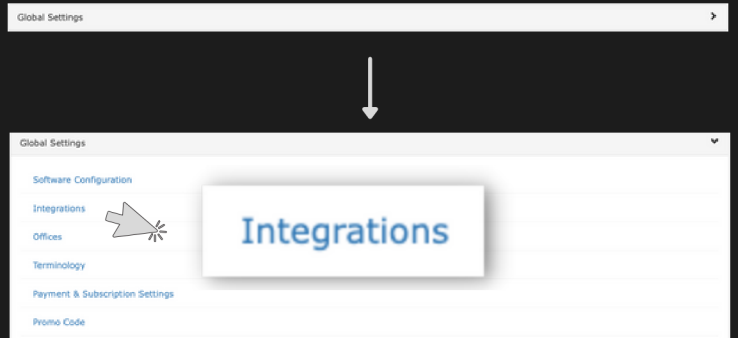
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



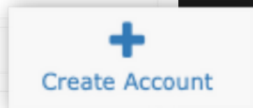
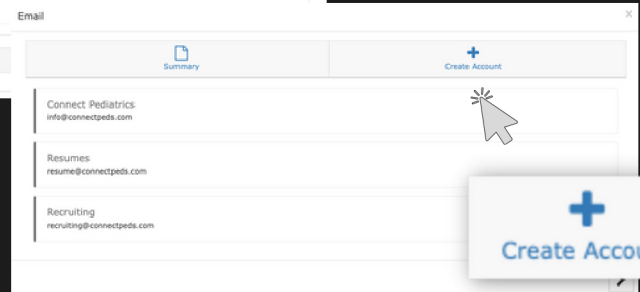
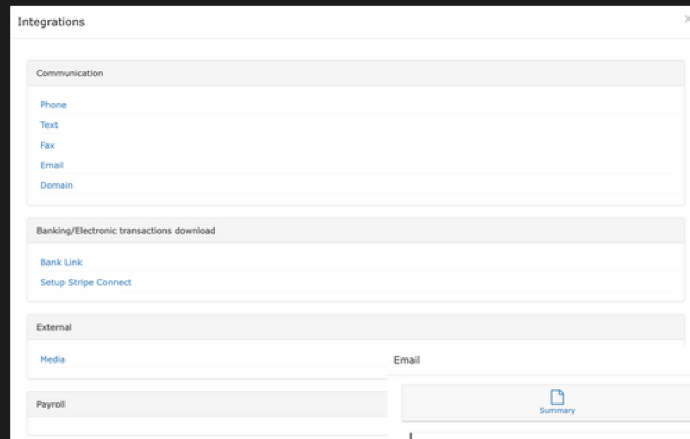
2 Global Settings —> Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



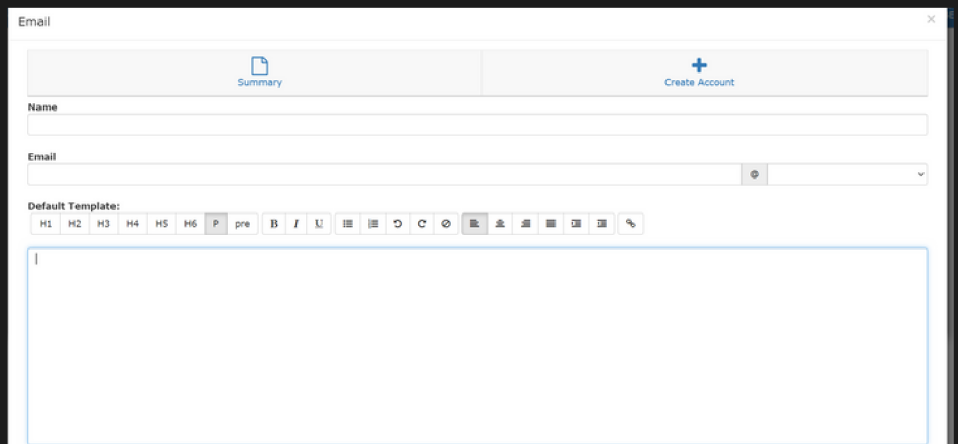
3 Click on 'Email'

- When the Integrations page open, click on the 'Email' option under Communication.
- An 'Email' page will open up with a summary of the existing emails linked.
- To add an account, click 'Create Account'.



4 Complete the Form

- Fill out the required fields with the email information and Limits settings.
- Don't forget to click 'Save' on the bottom right of the form.





Integrations: Fax

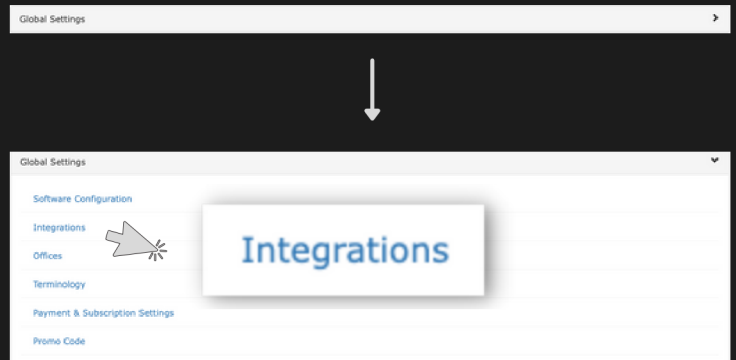
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



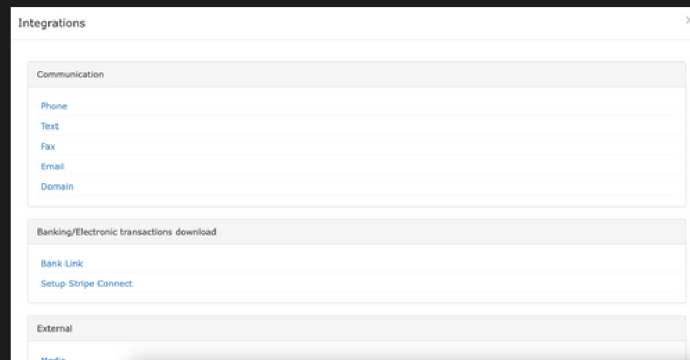
2 Global Settings —> Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Click on 'Fax'

- When the Integrations page open, click on the 'Fax' option under Communication.
- A 'Fax Accounts' page will open up. Click 'Add Fax Account' on the far right above 'Office(s)'



4 Complete the Form

- Fill out the required fields with the Fax information and input the Limits settings.
- Don't forget to click 'Submit' on the bottom right of the form.





Integrations: Phone

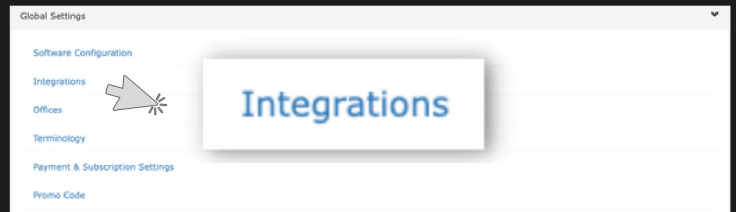
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



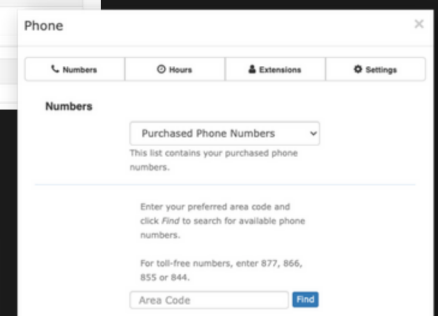
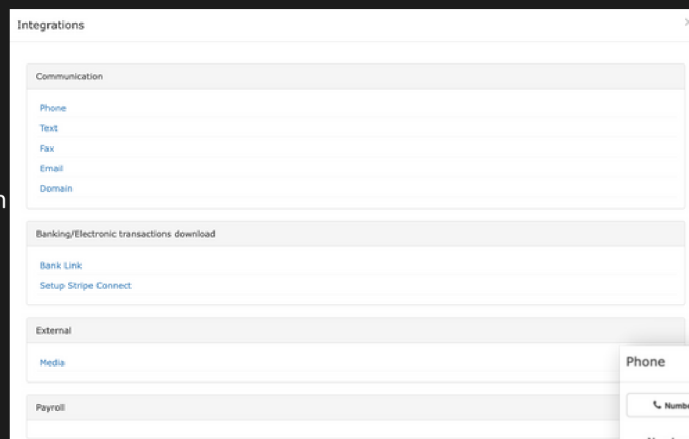
2 Global Settings → Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Click on 'Phone'

- When the Integrations page open, click on the 'Phone' option under Communication.
- A 'Phone' page will open up.



4 Complete the Form

- Fill out the required fields with the lead's information.
- Don't forget to click 'Save' on the bottom right of the form.