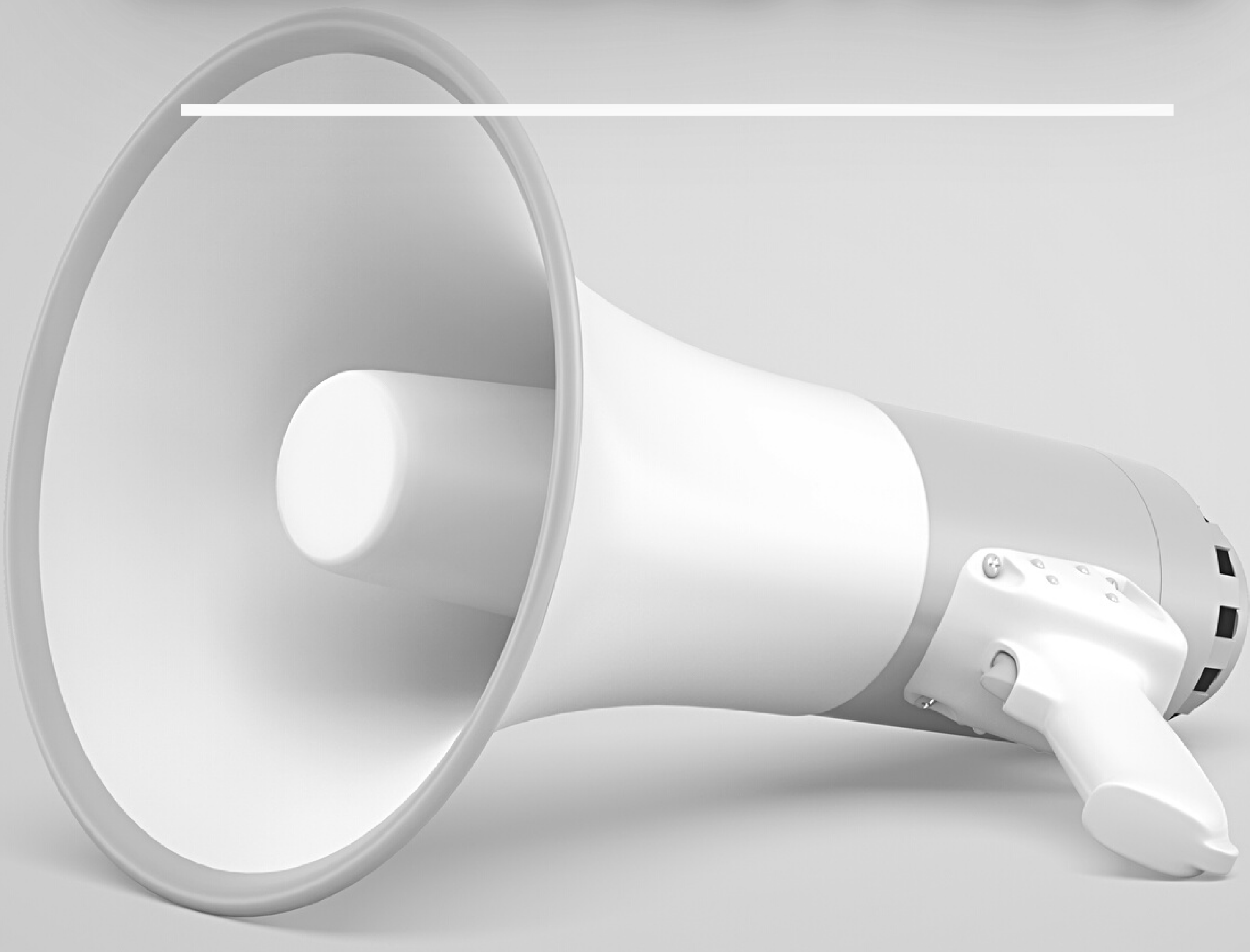
MARKETING



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

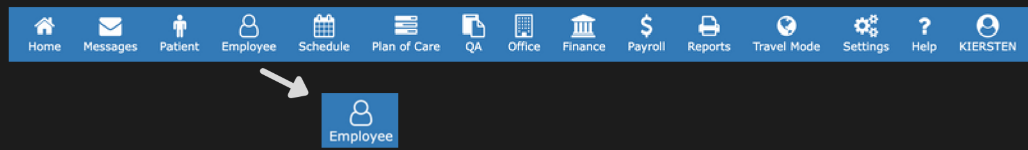
Estimated Duration: 1 hour 30 minutes

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

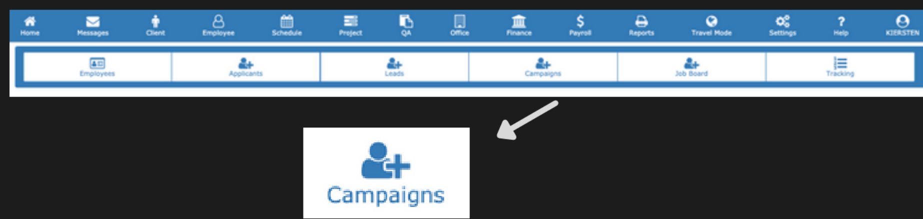
1 Go to 'Employee' Tab

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



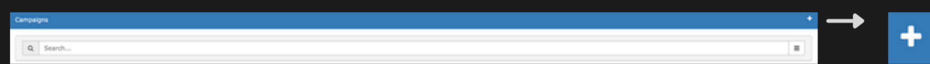
2 Go to Campaigns Section

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



3 Add a New Campaign

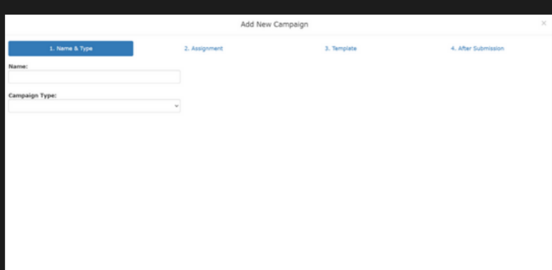
- Click the '+' icon on the far right to the search bar.
- A form will open up.



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.



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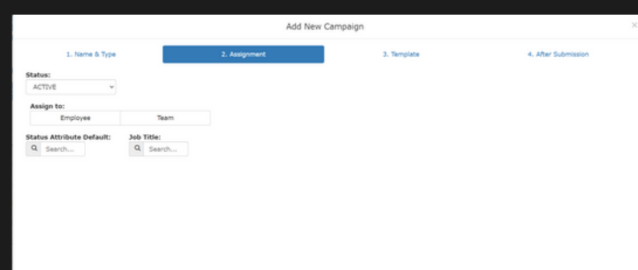

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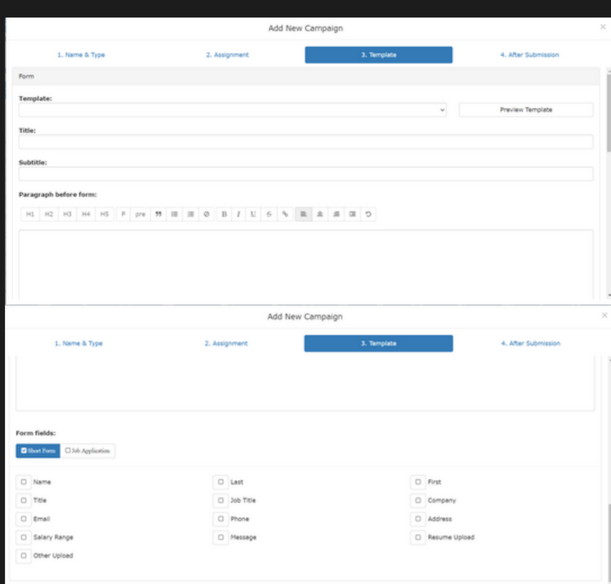

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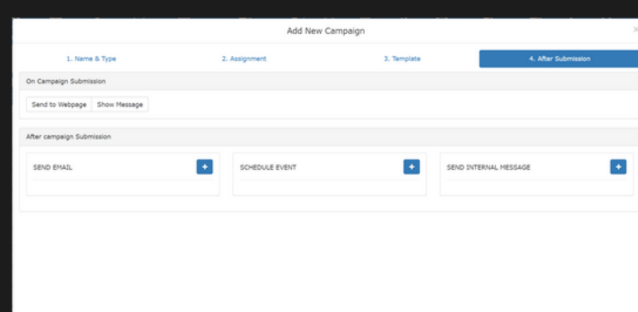
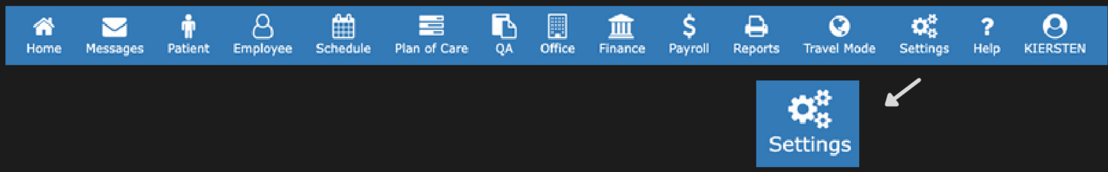


Integrations: Domain

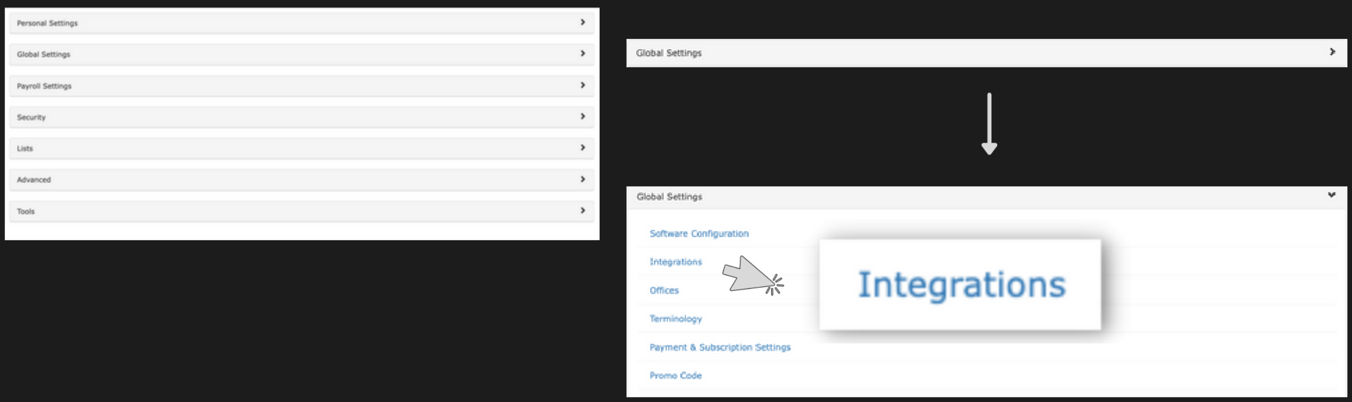
1 **Go to 'Settings' Tab**

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



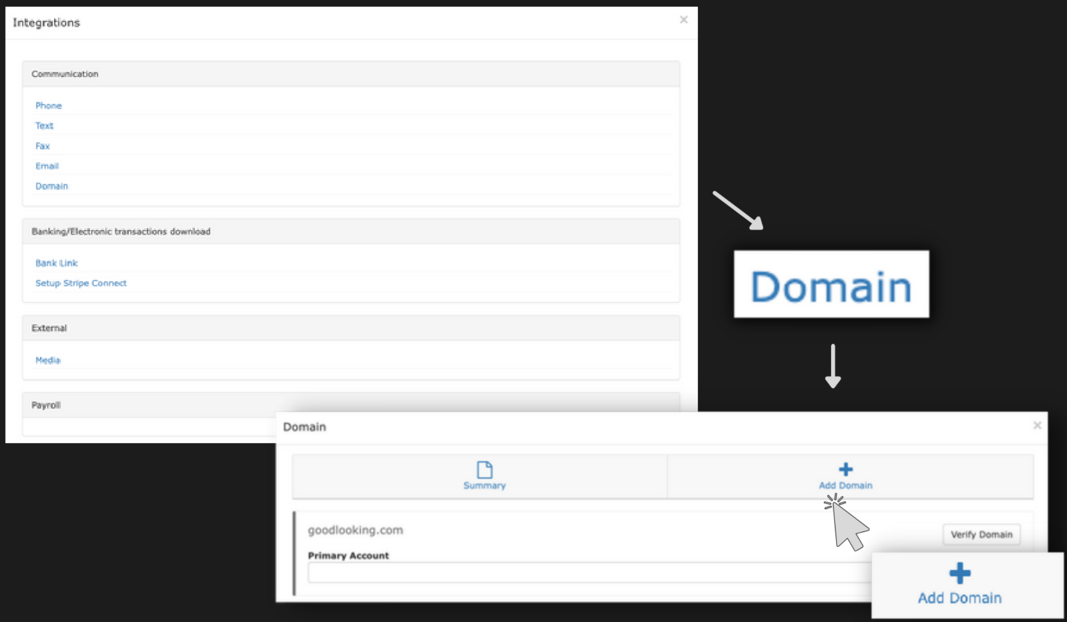
2 **Global Settings ⟶ Integrations**

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



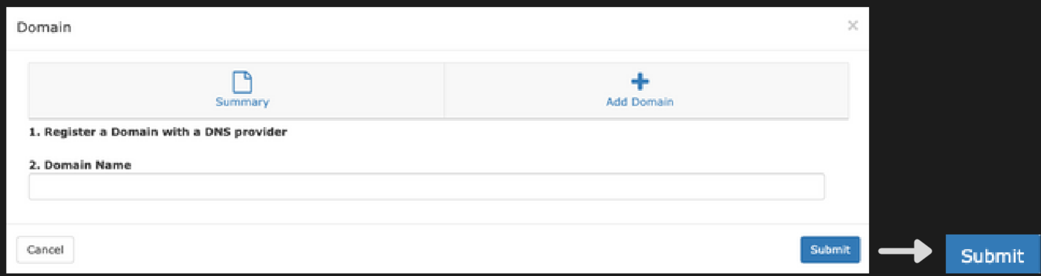
3 **Click on 'Domain'**

- 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**

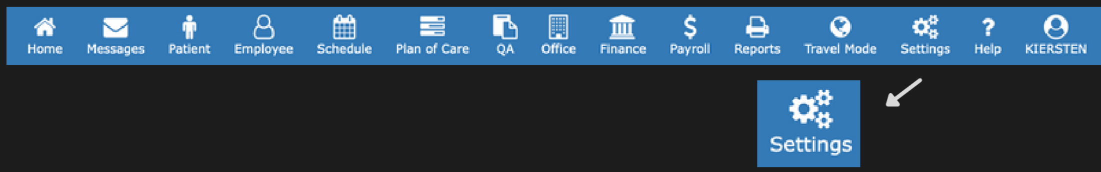
- Fill out the required fields with the domain information.
- Don't forget to click 'Submit'' on the bottom right of the form.



Integrations: Claims Clearinghouse

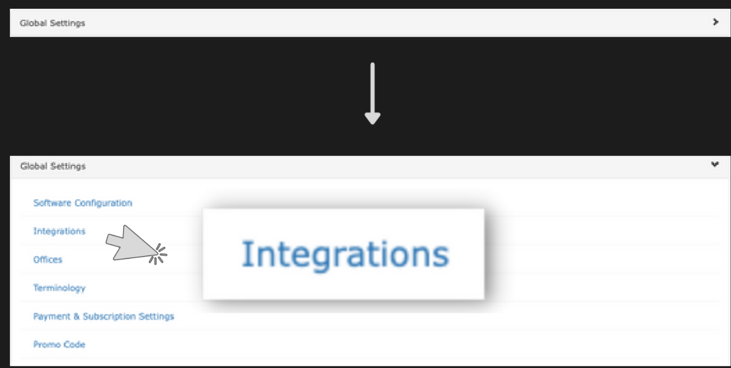
1 Go to 'Settings' Tab

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



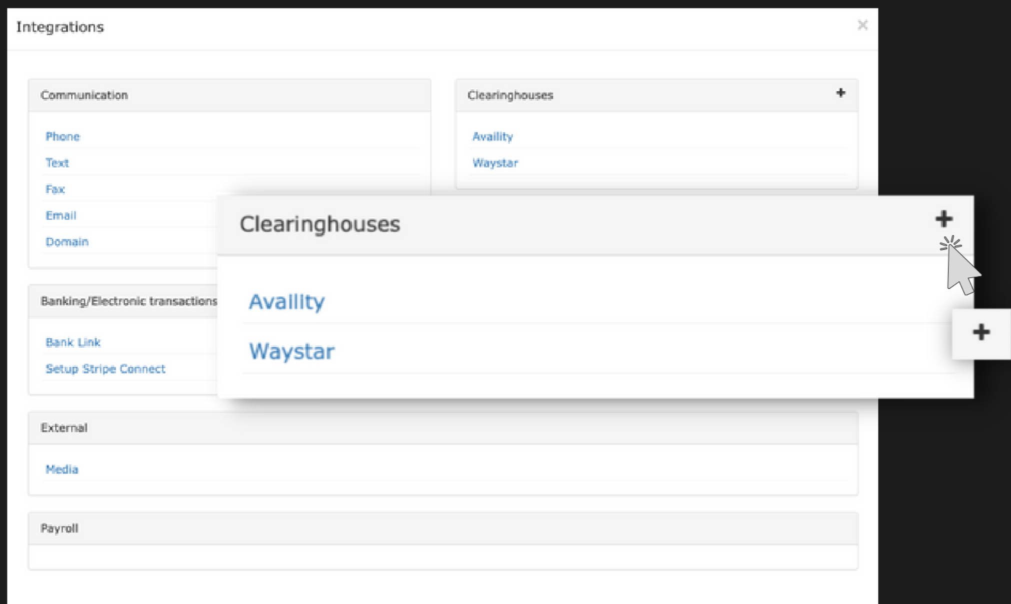
2 Global Settings ⟶ Integrations

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



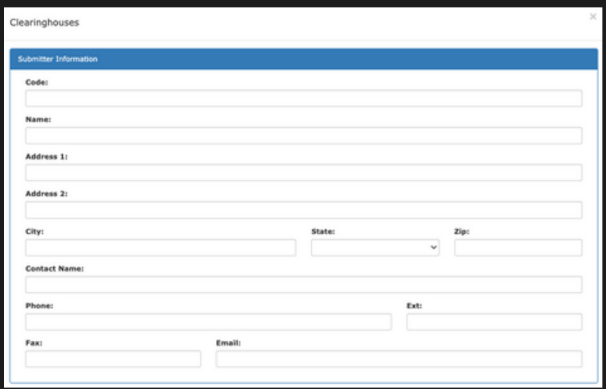
3 Add a Clearinghouse

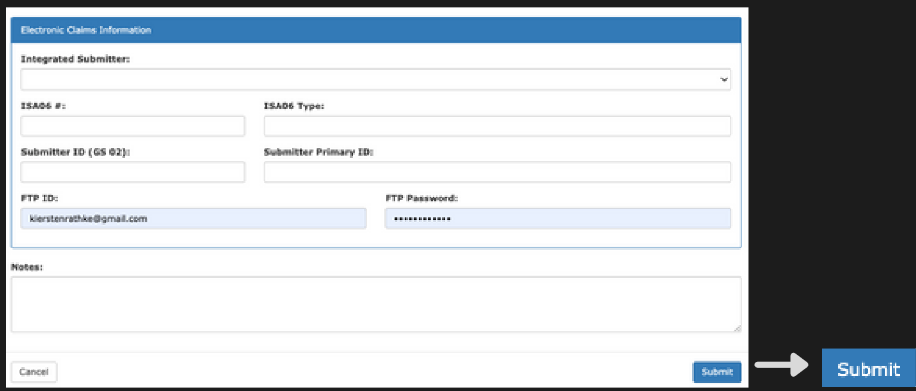
- When the Integrations page opens, click on the '+' to the right of Clearinghouses.
- A form will open.



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.

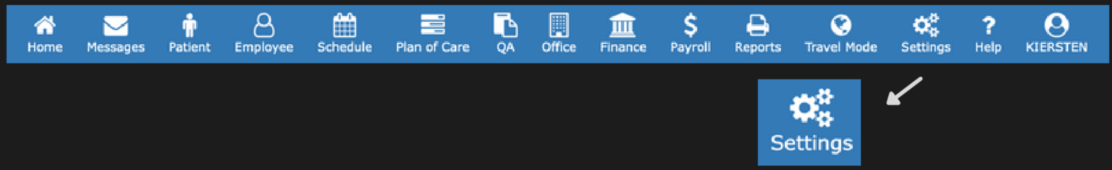




Integrations: Email

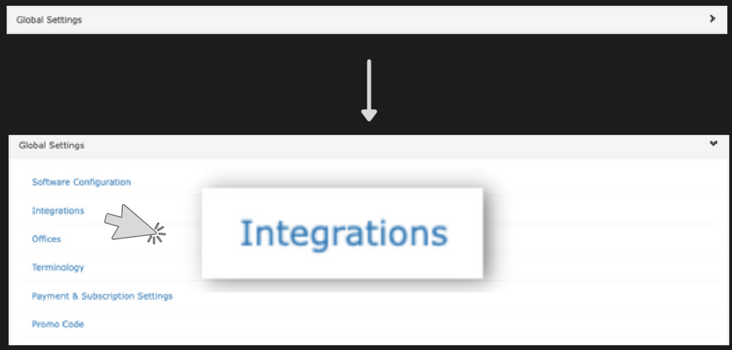
1 Go to 'Settings' Tab

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



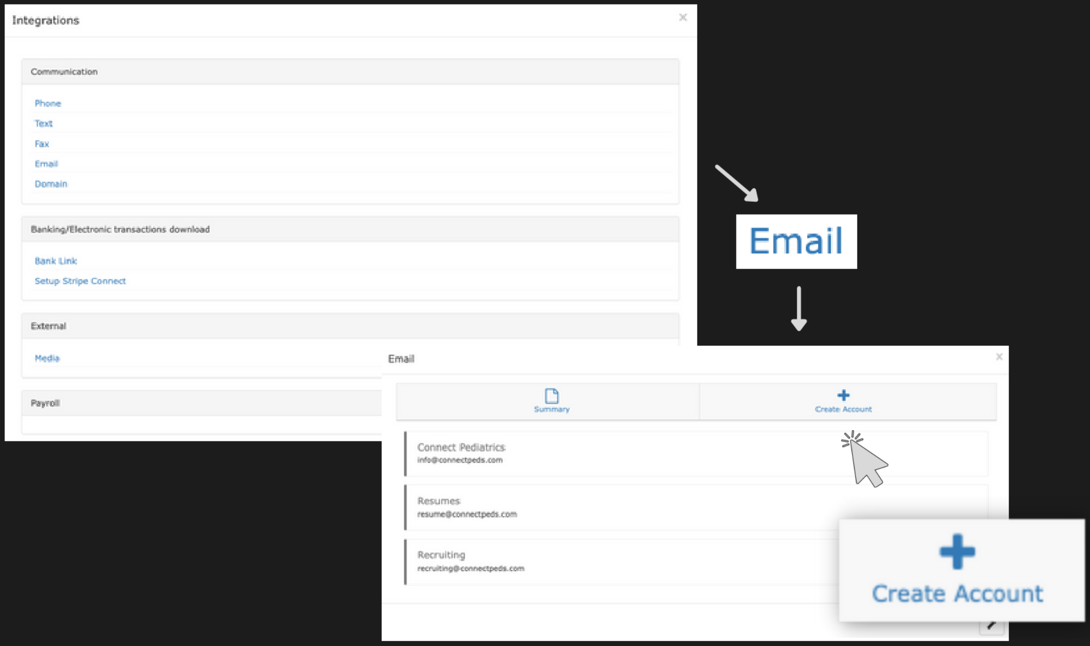
2 Global Settings → Integrations

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



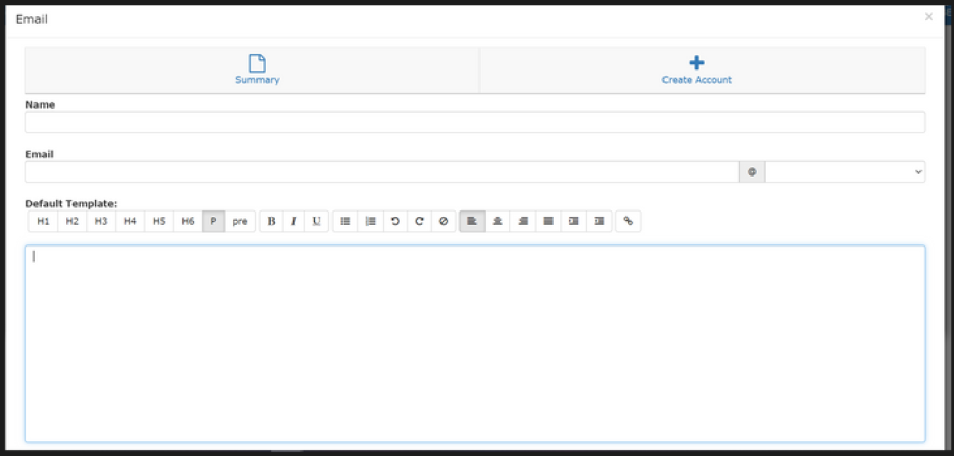
3 Click on 'Email'

- 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.

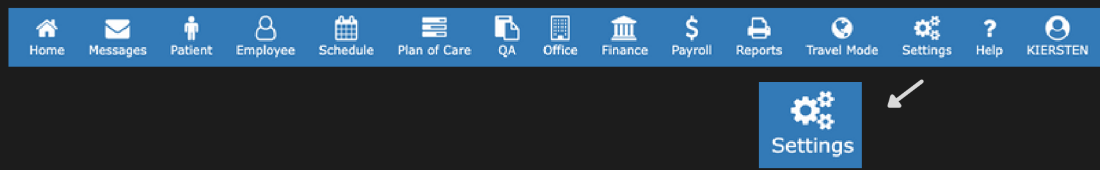


Integrations: Fax

1

Go to 'Settings' Tab

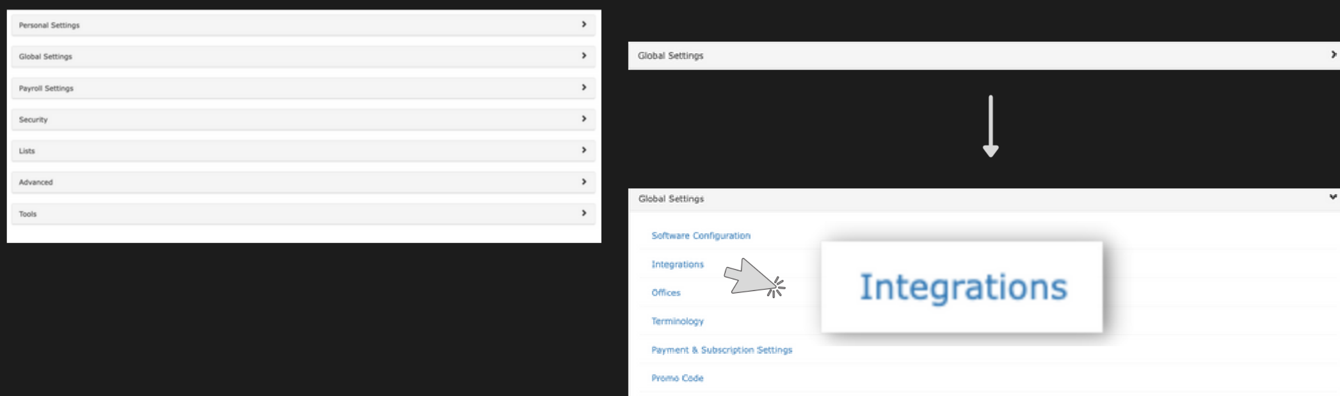
- On your home page, click the 'Settings' tab at the top tool bar.



2

Global Settings ⟶ **Integrations**

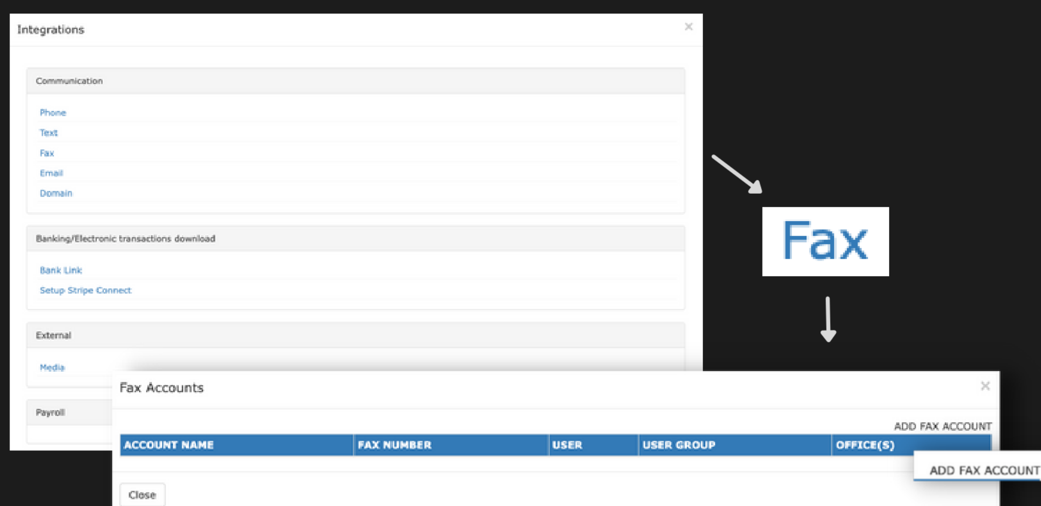
- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3

Click on 'Fax'

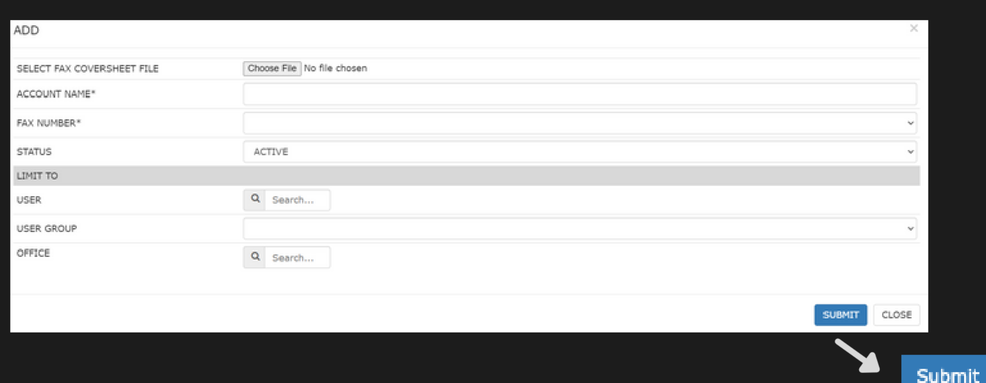
- When the Integrations page open, click on the 'Fax' option under Communication.
- A 'Fax Accounts' page will open up. Click 'Add Fax Account' on the far right above 'Office(s)'



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.



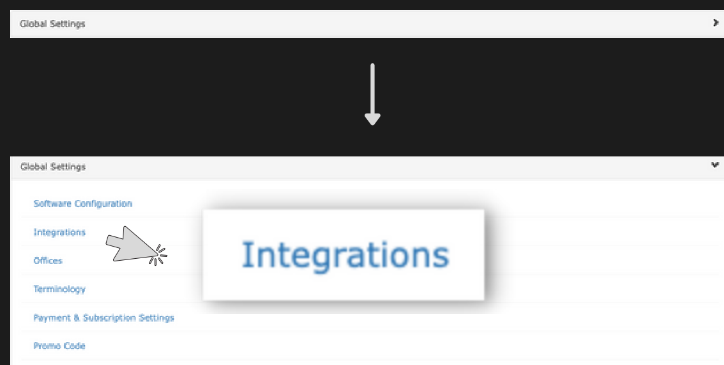
Integrations: Phone

1 **Go to 'Settings' Tab**

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

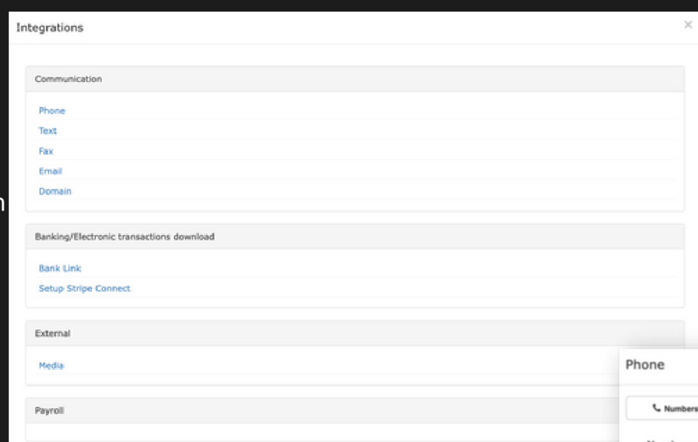
2 **Global Settings** → **Integrations**

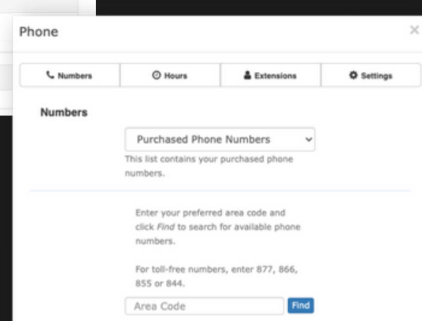
- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



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.