

ABELDent

Portal Configuration Guide 2.6



March 2015

This booklet contains or refers you to current information on using the features in ABELDent Portal.

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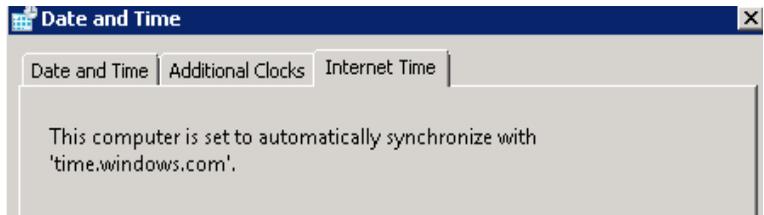
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Before you Configure Portal

The following requirements must be met by your office before Portal Setup can begin. Your IT provider will most likely be necessary to perform several of these tasks.

Server Requirements

- 1 Your office must have **Internet Access**. (Internet is only required on the Server, not every machine that will use Portal)
- 2 Your Server must be accessible over the internet by remote access.
- 3 Your Server time must be within 5 minutes of ABEL's server time. (You do not have to change your time zone or daylight savings time, as that is taken into consideration). ABEL's server is synchronized to **time.windows.com** as shown in the screen shot below.



- 4 Your Server must have a non-changing IP Address. This can be accomplished either by:
 - a. A Static IP Address.OR
 - b. Subscribe to a domain service that maps a Dynamic IP Address to a DNS name. Free services exist that will supply this ex: dyn.com).
- 5 You must be running ABELDent version **12.9.2** or higher on the Server.

Portal Requirements

- 1 Choose a sub-domain name for your portal.

The sub-domain name is often similar to your office's website name, for simplicity sake. For example, if your office's website domain is www.mainstreetdental.com, then you might name your portal domain mainstreetdental.abelportal.com (although you could choose another name if you wish, so long as it ends with ".abelportal.com").

- 2 If you have a business logo and want it to appear on your portal website and on emails sent to your patients, provide the following:

- Two (2) logo image files, e.g. one banner image for the website and one image for the email.
- The images must be in *.PNG format*.
- The maximum allowable size for the email image is *400 pixels (width) x 160 pixels (height)*.
- The maximum allowable size for the banner is *800 pixels (width) x 250 pixels (height)*

Register with MyABEL

The files required to install ABELDent Portal are located on our MyABEL website. In order to access these files you must have a MyABEL account.

■ To register:

- 1 Log on to www.myabel.com.
- 2 Click **MyABEL Registration**.
- 3 Complete the registration form and fax it to us at **866-337-5558** or email it to **registration@myabel.com**.

A temporary account password will be emailed to you.

Configuring Portal

Follow carefully each of the steps outlined in this section to successfully configure portal.

Step 1 - Test Port Forwarding

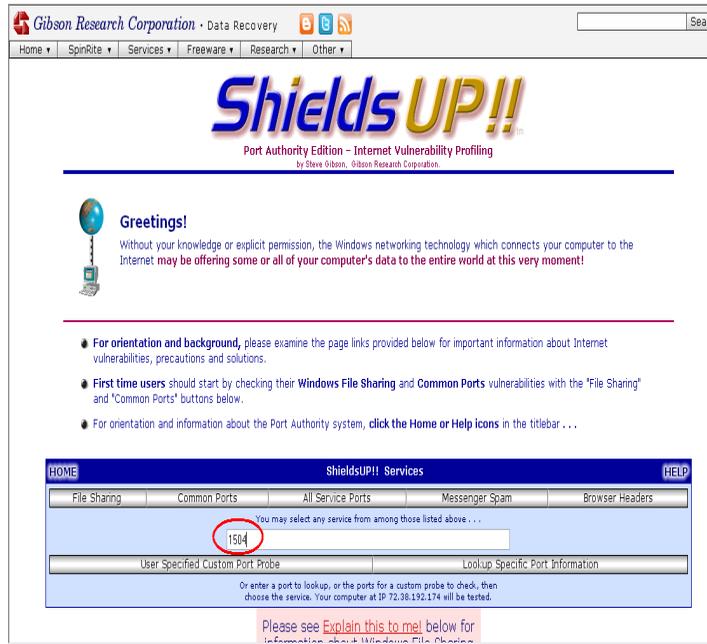
If your office is using a router (which is most often the case), the router uses port forwarding to access your Server.

Although **Port 1504** is the default port used, your IT person could choose another port. If so, make sure the ABELDent Portal Implementation Specialist is informed.

Have your IT technician or ABEL Implementation Specialist test that it is **open** using a free web services, such as **Shields Up** described below.

■ To Test Port Forwarding with Shields Up:

- 1 Go to the Shields Up - Gibson Research website at www.grc.com/sheildsup.com
- 2 Click the **Proceed** button.



- 3 Type the port number you're testing into the text box as shown in the screen example on the previous page. The default is **1504**.
- 4 Click the **User Specified Custom Port Probe** button.
- 5 If the answer comes back "Passed" it means that the selected port is NOT OPEN.



TruStealth
Analysis



- 6 If the answer comes back "Failed", it means that the selected port IS OPEN and you can proceed with the ABELDent Portal installation.

Step 2 - Install Portal Administration

Once the setup is complete, you can download the Portal Administration application from your **MyABEL** account. See "Register with MyABEL" on page 5.



Important: Prior to installing, you should exclude the Portal Administration.exe file from any anti-virus program you have running to prevent it from being blocked.

■ To Install Portal Administration:

- 1 Log on to www.myabel.com.
- 2 Click **Login on the toolbar** and enter your **Email** and **Password**.
- 3 Click the **Dental** menu and choose **ABELDent Portal**.
- 4 Click the following link on the page.

Getting Started with ABELDent
Portal: A Step By Step Guide

- 5 Scroll down to **Install or Update ABELDent Portal on your System**.

- 6 Download and install the following ABELDent Portal files:
 - **Server Download:**
Install the **SetupPortalServer.exe** file on your Server.
 - **Client Workstation:**
Install the **SetupPortalClient.exe** file on all machines that will be used to administer appointment confirmations. Normally, this means front desk, phone station and business office machines, but usually not operatories and dentists' office machines.
- 7 Make sure that port 1504 TCP is opened in your firewall.
- 8 Prior to installing, you should exclude the **Portal Administration.exe** file from any anti-virus program you have running to prevent it from being blocked.

Step 3 - Enter your Client ID and Portal Website Address

- 1 Open the **Portal Administration** application.
- 2 Click the **Settings** button. The **Settings** window appears.



- 3 Type your customer ID into the **Client ID** field, e.g.C01234.
- 4 Type the sub-domain name in the **Website Address** field. This is the name you chose for your portal website. See See 'Portal Requirements" on page 5 for details.

Step 4 - Configure your Email Account

You can send emails to your patients using ABELDent's integrated email service, or your own SMTP email server.

IMPORTANT: Instructions for both methods are shown in this section; however, we strongly recommend that you use ABELDent's integrated email service.

Using ABELDent's Integrated Email Service

- 1 On the **Settings** window in Portal Administration, click **Configure Email Settings**.
- 2 The **Email Server Configuration** window appears.



Important: Mandrill Integration operates in the background and will not affect how you manage your appointment confirmation and reminder emails in ABELDent Portal

- 3 Type the **Sending Email Address** you are going to use to send emails to your patients. Normally, this would be your office email address, but not necessarily.

- 4 Click **Use Mandrill Integration**, the integrated email service used by ABELDent. The remaining fields are now inactive and no further configuration is required.
- 5 Click **Save** to activate the service.

Using your SMTP Email Server

- 1 On the **Settings** window in Portal Administration, click **Configure Email Settings**.

The **Email Server Configuration** window appears.



*Your Email SMTP Settings can be found in the **Account Settings** of your Microsoft Outlook application. Different versions of Outlook may store this information in different ways.*

- 2 Type the **Sending Email Address** you are going to use to send emails to your patients. Normally, this would be your office email address, but not necessarily.
- 3 Click **Use SMTP**.
- 4 Type the **Host** and **Port** name for the outgoing SMTP.
- 5 Type the **Username** for the email account you selected in step (2) above.
- 6 Enter the **Password** for their email account.

- 7 If the email server resides on a **Domain**, type the domain name.
- 8 Click the **Enable SSL** check box to secure the Username and Password.
- 9 To test the connection, click **Test SMTP Connection** and then click **Save**.

Step 5 - Activate Portal

Once you have ABELDent Portal configured, the next step is to activate it using either of the following methods:

- Email the information below to dentsupp@abeldent.com with **Attn: Portal Setup** in the Subject line.
 - Your Customer ID
 - Your Clinic Name
 - Your telephone number (just in case)
 - Your DNS name or Static IP address
 - Your chosen website domain name
 - Your logo image as an attachment
- If you are a registered MyABEL user, log on and complete the Portal Activation Request online form.

Testing Portal

Once you've submitted your Portal configuration information to ABEL, an ABEL support representative will review the information and then send you an email confirming Portal has been activated. You can then proceed with the following testing steps.

Step 1 - Create a Test Patient

- 1 Click **File > New Patient**.
- 2 Enter a fictional **First Name, Last Name and Birthdate**.
- 3 Enter your own **Mobile** phone number and **Email** address.

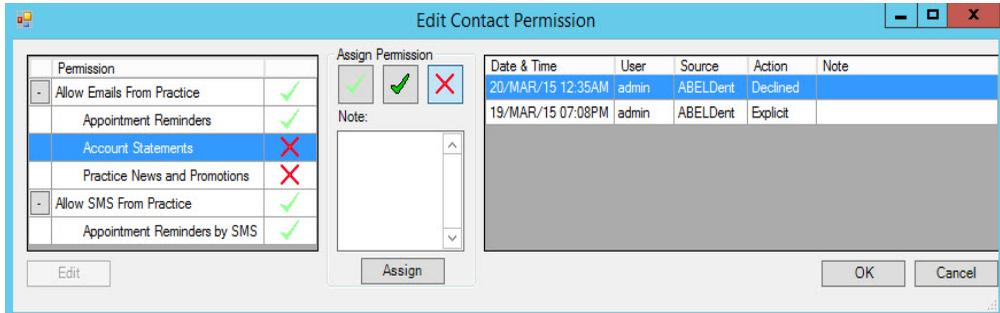
The screenshot shows a patient information form with several sections. Two sections are highlighted with red boxes:

- Personal Information:** Last Name: Test, Title: [dropdown], First Name: Brianneale, Gender: F, Initial: [empty], Jr/Sr: [dropdown], Birthdate: 18/NOV/1992, Age: 22, Lang. Pref.: - Default.
- Contact Information:** Home: (416)-490-0777, Unlisted: [checkbox], Work: (905)-000-0000, Ext: [empty], Mobile: (905)-979-2241, Allow SMS: [checked], Other: (000)-000-0000, Desc: [empty], Best Method: [dropdown], Best Time: [empty], Email: bneale@anywhere.com, [dropdown], [Perm.]

Other visible sections include Mailing Information (Householder: [checkbox], Address: 62 Strathearn Rd., City/Postal: Toronto, Ontario / M6C1R6), Practice Information (Usual Dentist, Hygiene Provider, Usual Assistant, Last Recall Date: 08/MAY/1997, Recall Interval: 6 - 6 month rc, Scaling Interval: 0 months), Status (Active: [checked], Account Holder: [dropdown], Patient Since: 00/??/0000, Portal Patient: Yes), and Notes and Flags (Medical Cond, Premedicate?, Handicapped?, Physician, Important Notes, Alternate ID).

- 4 Click the **Perm.** button.

The **Edit Contact Permission** dialog appears.



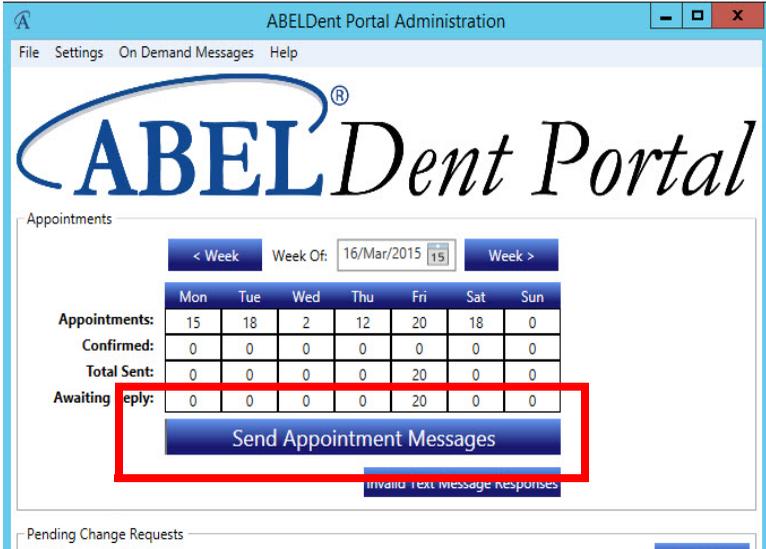
- 5 Click **Edit**.
- 6 To allow the doctor’s office to send the test patient appointment reminders by email:
 - a. Click **Appointment Reminders**.
 - b. Click the  icon.
 - c. Click **Assign**.
 - d. Click **OK**.
- 7 To allow the doctor’s office to send the test patient appointment reminders by email:
 - a. Click **Allow SMS From Practice**.
 - b. Click the  icon.
 - c. Click **Assign**
 - d. Click **OK**.
- 8 Click **Save** on the Personal tab.

Step 2 - Book an Appointment

- 1 Click the  icon, or click **File > Schedule**.
- 2 Double-click in an open time slot for tomorrow's date.
The **Patient Selection** window appears.
- 3 Select the fictional user you added in step 1.
The **Appointment Add** window appears.
- 4 Enter a **Work to Do**.
- 5 Click **OK**.

Step 3 - Launch Portal Administration

- 1 Click **Start > Programs > Portal Administration**.
The **ABEL Security** dialog appears.
- 2 Type the Administration Manager's **User ID** and **Password**.
- 3 Click **OK** to display the Portal Administration window.



ABELDent Portal Administration

File Settings On Demand Messages Help

ABELDent Portal

Appointments

< Week Week Of: 16/Mar/2015 15 Week >

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----------------|-----|-----|-----|-----|-----|-----|-----|
| Appointments: | 15 | 18 | 2 | 12 | 20 | 18 | 0 |
| Confirmed: | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Sent: | 0 | 0 | 0 | 0 | 20 | 0 | 0 |
| Awaiting Reply: | 0 | 0 | 0 | 0 | 20 | 0 | 0 |

Send Appointment Messages

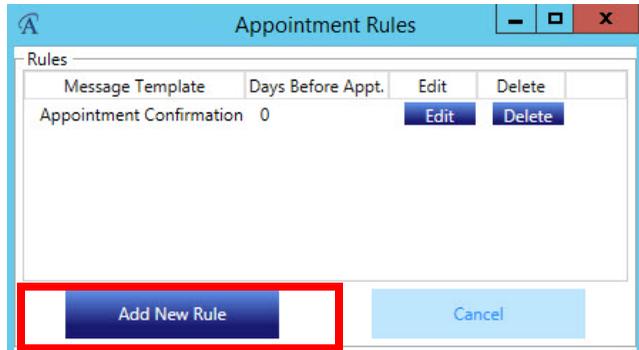
invalid text message responses

Pending Change Requests

Step 4 - Create a Rule

- 1 Click **Send Appointment Messages** in the middle of the screen.
- 2 Click **Appointment Rules** in the lower-left corner.

The **Appointment Rules** window appears.



- 3 Click **Add New Rule**.

The Appointment Rule dialog appears.



- 4 Click the down-arrow beside **Message Template** and select **Appointment Confirmation**.
- 5 Click **OK** and then **Yes to Save**.
- 6 Click **Cancel**.

The Appointment Batch window appears.

Step 5 - Send the Appointment Confirmation

- 1 On the **Appointment Batch** window, select tomorrow's date in the **From** field.

Appointment Batch

Messages will be sent immediately according to the Appointment Rules. Increase the data range to send messages for additional days. For instance, you may want to increase the range if the office is closed for vacation.

From: 31/Mar/2015 To: 31/Mar/2015 Refresh

| Message Template | Appts | Appts w/ Email | Appts w/ SMS | Emails To Be Sent | SMS To Be Sent | Appt. Date | Batch Status | Date Sent |
|--------------------------|-------|----------------|--------------|-------------------|----------------|-------------|--------------|-----------|
| Appointment Confirmation | 23 | 23 | 23 | 23 | 1 | 31/Mar/2015 | Not Sent | |

- 2 Click **Refresh**.
- 3 Click on the **Appointment Confirmation** message template.

Notice that all appointments for the date shown are listed.

Appointment Batch

Messages will be sent immediately according to the Appointment Rules. Increase the data range to send messages for additional days. For instance, you may want to increase the range if the office is closed for vacation.

From: 29/Mar/2015 To: 06/Apr/2015 Refresh

| Message Template | Appts | Appts w/ Email | Appts w/ SMS | Emails To Be Sent | SMS To Be Sent | Appt. Date | Batch Status | Date Sent |
|--------------------------|-------|----------------|--------------|-------------------|----------------|-------------|--------------|-----------|
| Appointment Confirmation | 27 | 27 | 27 | 27 | 0 | 30/Mar/2015 | Not Sent | |
| Appointment Confirmation | 23 | 23 | 23 | 23 | 1 | 31/Mar/2015 | Not Sent | |
| Appointment Confirmation | 11 | 11 | 11 | 11 | 0 | 01/Apr/2015 | Not Sent | |
| Appointment Confirmation | 22 | 22 | 22 | 22 | 0 | 02/Apr/2015 | Not Sent | |
| Appointment Confirmation | 0 | 0 | 0 | 0 | 0 | 03/Apr/2015 | Not Sent | |
| Appointment Confirmation | 1 | 1 | 1 | 1 | 1 | 04/Apr/2015 | Not Sent | |
| Appointment Confirmation | 0 | 0 | 0 | 0 | 0 | 05/Apr/2015 | Not Sent | |
| Appointment Confirmation | 5 | 5 | 5 | 5 | 0 | 06/Apr/2015 | Not Sent | |
| Appointment Confirmation | 37 | 37 | 37 | 37 | 0 | 07/Apr/2015 | Not Sent | |

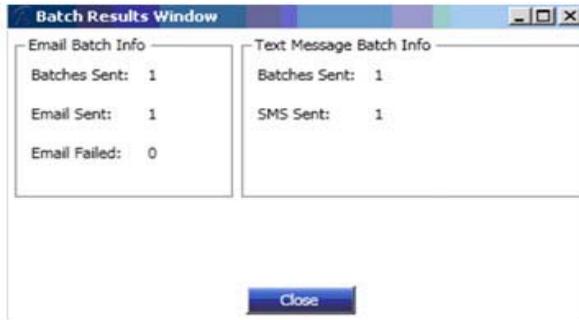
| Appointment Date | Time | Provider | Patient Name | Appt. State | Email Address | Last Email | Email Status | Send Email | Mobile Phone Number | Last SMS | SMS Status | Send SMS |
|------------------|-------|----------|---------------|-------------|--------------------|------------|--------------|-------------------------------------|---------------------|----------|------------|-------------------------------------|
| 04/Apr/2015 | 0:00A | S | Test, Brianne | Unconfirmed | bneale@idirect.com | | | <input checked="" type="checkbox"/> | 9059792241 | | | <input checked="" type="checkbox"/> |

Appointment Rules Send Messages

- 4 In the list, locate your fictional patient and check the box in the **Send Email** and the **Send SMS** column. Make sure you uncheck these columns beside the other appointments listed.

5 Click Send Message.

The **Batch Results** window appears.



6 Click Close.

7 To confirm the appointment by email:

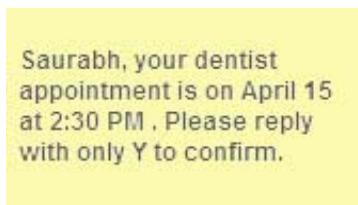
- a. Open the email program for the email address you used for the fictional patient.
- b. Look for the **Confirm Appointment** email.



- c. Click the **Confirm Appointment** button.

8 To confirm the appointment by text message:

- a. Open your smart phone and look for the **Confirm Appointment** text message.



- b. Press the required character on your keypad to confirm the appointment.

The ABELPortal web page appears stating "Success, your appointment has been confirmed"



Now that the test patient has confirmed the appointment via email, it will appear in Portal Administration waiting your acceptance as shown in the next step.

- 9 Go to the **Portal Administration** main window and click the  icon beside the appointment.



- 10 Go to **Scheduler** and verify that the appointment state for the appointment is "Confirmed".

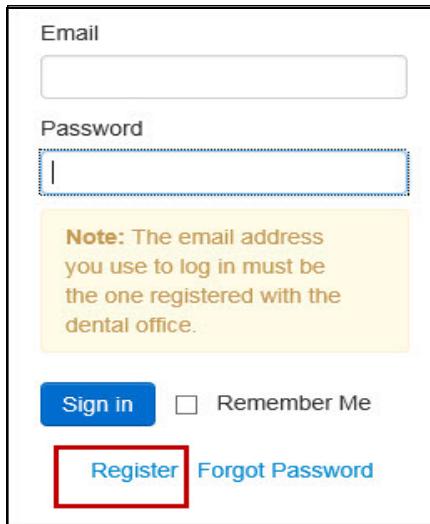
Step 6 - Create a Portal Account for the Test Patient

- 1 Open your web browser (Internet Explorer, Chrome, etc.)
- 2 Type the following into the address bar at the top:

https://<subdomain>.abelportal.com/Account/LogOn

(Subdomain is the website address. It can be found on the **Portal Administration** main page).

The **ABELDent Portal** web page appears.



Email

Password

Note: The email address you use to log in must be the one registered with the dental office.

Remember Me

[Forgot Password](#)

- 3 Click **Register**.

The **Create a New Account** page appears.



Important: The Name, Email Address and Date of Birth must match the information entered on the Test Patient's Personal tab.

4 Enter the **Account Information** for the Test Patient.

Create a New Account

Please fill in the fields below and click Register to create a new account.

Account Information

First Name

Last Name

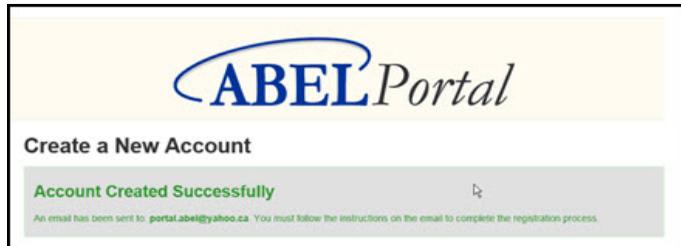
Email Address

Date of Birth April 1962

Note:
Registration will only be successful if you use the same name and email address that we have on file for you.
Please call us if you need assistance determining this information or if you require further help with this registration process.

5 Click **Register** and the following will occur:

- A message will appear stating the account was created successfully.



- An email will be sent to the email address of the Test Patient. It will contain a link to ABELSoft's account registration page where you can set your password.
- 6 Advise the Dentist/Office Manager that Portal setup is completed and to contact ABELSoft for training. See "Portal Training" on the next page.

Training

ABELDent Inc. strongly suggests you arrange internet-based training to configure your ABELDent Portal settings and features. On-site training is also available at an extra cost.

Once you've activated your Portal, an ABELDent representative will contact you to arrange training.

Remember, unlike your ABELDent system in your office, ABELDent Portal will be used by your patients and you will be sending correspondence to them.

- You want the messages you send to be clear and comprehensive.
- You want your patients to have access to the features you want them to use and to not have access to the features you'd rather they not use.

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