MoCo[™] SMS Suite

Quick Guide for Clinics

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Chapter 1: Introduction

1.1 Purpose

The purpose of this document is to provide a Quide Guide for customers who are using MoCo in dental / specialist / medical clinics.

1.2 Target Audience

The target audiences of this document are all clinic operators in the dental / specialist / medical sector.

Chapter 2: Patient Database Management

2.1 Import existing patient database

You can import your existing patient information into MoCo's Address Book. The import file can be either in csv (comma-separated-values) format, or a tab-delimited file, or a MS Excel file (*.xls).

2.1.1 Prepare Import File (csv/txt) from existing database

To prepare import file from your existing Microsoft Excel spreadsheet,

Step 1: Open your patient database spreadsheet using MS Excel.

Step 2: From the File menu, select "Save As ..." option.

Step 3: A "Save As" dialog box will appear.

	A		B	C	D	E	F	G	Н	1	J	K	L	M	N	0	P	Q	F.
	Dennis Chang	+6591									? 🛛								
			Save As																
	Daniel Chua	+6598	Save in:	🗎 MoCo Te	stBed		¥ (3	- 🔰 🖸	X 📬 📰	 Tools 									
	Eric Boo	+6581																	
	Chang Cheow Joo	+6581	Ò	Export Add															
	Hark Loong	+6598	My Recent	Export Add															
	Kahshin	+6593 +6597	Documents	Import Add															
	Mun Kiat	+6597	-	Import Add															
9	Wilson Chia	+6598		Import Add															
10				Import Add															
11			Desktop	Import Add															
12			-	Import Add															
9 10 11 12 13 14				aniport Aut	ur DUUK 7.0	.57													
14			My Documents																
15		-	rij bosanorio																
10																			
1/																			
10			My Computer																
19			~																
20										_									
21			My Network	File name:	Import A	ddr book1.c	SV.		*		<u>ave</u>								
22			Places	Save as type:	CSV (Co	mma delimite	ed) (*.csv)		~		ancel								
20		- L		_	Unicode	Tevt (* hvt)													
25					Microsof	t Excel 5.0/9	95 Workbook	(*.xls)											
26					Microsof	t Excel 97- E	95 Workbook Excel 2003 & ! ed) (*.csv)	5.0/95 Workb	iook (*.xls) —	-									
27					Microsof	t Excel 4.0 V	Worksheet (* Worksheet (*	xls)											
28					Microsof	t Excel 3.0 V	Varksheet (*	xls)	*										
29																			
30																			
31																			
32																			
16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 32 4																			_
24 4 4	Export Ad	ldr book	:1/	1							<								>

Step 4: Key in the file name to be saved and select the type of file to be saved. For csv file, select "CSV (comma-delimited) (*.csv)" as the file type. For tab-delimited file, select "Text (Tab-delimited) (*.txt)" as the file type.

Step 5: Click "Save" button. The below warning box may appear. Just click "Yes" button.

Microsoft Excel
Export Addr book1.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? V To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, dick No. Then save a copy in the latest Excel format. To see what might book, click Heb.
Yes No Help

Step 6: The csv / txt file is saved successfully. Close the MS Excel application.

2.1.2 Prepare Import File (MS Excel) from existing database

To directly import the address book from a MS Excel sheet, you need to convert the "Mobile Number" field (and whatever number fields you have in your database) into a Text field:

Step 1: Open the existing excel file using Microsoft Excel. A sample of the excel file is shown below:

	A	B	C	D	E	F
1	Name	Raw Mobile	Address	DOB	Gender	Group
2	Chee Yong	91112222	Blk 23 Potong Pasir #04-08	11/14/1975	Male	Member
3	CSL	+6592221111	123 Eunos Road	1/20/1972	Male	Non-member
4	Dennis	92223333	Blk 3 Geylang Road #01-234.	11/12/1975	Male	Member

Step 2: Convert column B ("Raw Mobile") into TEXT:

2a. Highlight the column (in this case, column B) to be converted.

2b. Select from menu, "Data -> Text to Columns ..." option.

2c. The dialog box shown below will be displayed. Click the "Next" button.

	determined that your data is Delimited. ose Next, or choose the data type that best describes your data.	
Original data type		
Choose the file type	e that best describes your data:	
 Delimited Fixed width 	 Characters such as commas or tabs separate each field. Fields are aligned in columns with spaces between each field. 	
Preview of selected		
_		

2d. The dialog box shown below will be displayed. Click the "Next" button again.

Convert Text to Columns Wizard - Step 2	of 3	? 🗙
This screen lets you set the delimiters your data or how your text is affected in the preview below. Delimiters I gab Semicolon Gomma Space Other: Data greview	ontains. You can see	
Raw Mobile 91112222 #6592221111 92223333 93334444		
Cancel	Next > Einist	

2e. The dialog box shown below will be displayed. Select "Text" and click "Finish" button.

This screen lets you select each column and set the Data Format.	Column data format
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.	⊙Text ∩ Date: MDY ▼
-	
	🔘 Do not import column (skip)
<u>A</u> dvanced	
	Destination: \$B\$1
Data greview	
Text	
Raw Mobile 91112222	
T <u>ext</u> Raw Mobile 91112222 +6592221111	
Raw Mobile 91112222 46592221111 92223333	
Raw Mobile 91112222 +6592221111	

2.1.3 Configure type of Import file

Before importing the Address Book, you need to select the type of import file that MoCo needs to import.

Step 1: At the MoCo software, select "Configuration Settings". A dialog box as shown below will appear.

Configuration Setting	gs	
Configuration Settin Basic General Address Book Scheduler Appointment Book Device GSM Terminal	Address Book Area Code to be auto-inserted : +65 Default SMS Subscription By default, subscribe to SMS By default, do not subscribe to SMS Default Import Address Book Delimiter Format for importing address book : MS Excel SpreadSheet Name : Sheet1 Duplication Check Enable Duplication Check when adding/updating contacts	
	OK Cancel	Apply

Step 2: Under "Format for importing address book", select the type of import file you are going to import into MoCo's address book. For MS Excel file, you will need to specify the SpreadSheet name also.

Step 3: Click "OK" button.

2.1.4 Import csv/txt/excel file into MoCo

To import from csv file into address book,

Step 1: From the File menu, click on the Import Address Book

Step 2: From the **Open** dialog box, select the csv or txt file to import into the database. Click "Open" button.

Open				? 🛛
Look in:	🗀 MoCo TestBe	d	- 🔶 🖻	* 💷-
My Recent Documents Desktop My Documents My Computer	Export Addr bo	iak.csv iak I.csv iak 2.csv iak 3.csv iak 3.csv iak 4.csv iak 5.csv		
S	File name:	Export Addr book1.csv		Open
My Network Places	Files of type:	Comma Separated Values Files	(".csv)	 Cancel

Step 3: On the **Import Address Book** dialog, match and select the correct field of each column. If you do not select a field name above the column, that particular column will not be imported.

Name	-	Mobile Number	-	NRIC	💌 Contac
Dennis Chang		+6591181254		57012345A	
Foo Chee Yong		+6596988152		57123436B	Friends
Daniel Chua		+6598465863		57234567C	Friends
Eric Boo		+6581983951		57345678D	
Chang Cheow Joo		+6581239211		S7456789E	
Hark Loong		+6598268922		S7567890F	
Kahshin		+6593625065		57678912G	
Mun Kiat		+6597429045		57789123H	
Wilson Chia		+6596885046		57891234I	

Step 4: If one of the column of your database contains the name of the contact group, you can select the option "Contact Group" for that column. For contacts who are members of multiple contact groups, the contact group names are separated by semicolons within the column.

Mobile Number	NRIC	Contact Group
+6591181254	S7012345A	
+6596988152	S7123436B	Friends;Class A
+6598465863	S7234567C	Friends;
+6581983951	S7345678D	Friends;Class B
+6581239211	S7456789E	
+6598268922	S7567890F	
+6593625065	S7678912G	
+6597429045	S7789123H	
+6596885046	57891234I	

Step 5: Click **Import** button to start importing.

Step 6: A dialog box as shown below will appear, displaying the contacts that are imported successfully and those that failed.

Import Result		
Passed Contacts Total number: 9 Chang Cheew Joo Daniel Chae Bene Boo Foo Chee Yong Hast Loong Hast Loong Mun Kiat Witton Chie	Feiled Contacts— Totel number: 0 Contact Name Reason of Feilure	
	Save Result Proceed	i Cancel

Step 7: To save result of the import process, click "Save Result". The result is saved into a text document.

Step 8: To proceed with the import process, click "Proceed" button. To abort the import process, click "Cancel" button.

2.2 Register new patient

To register new patient into MoCo, go to the Address Book page of MoCo.

Step 1: Click on state button to clear contact information area.

Step 2: Enter patient information into respective fields.

Name	Dennis Chang	<u>^</u>
Mobile Number	+6591111222	
NRIC	57012345A	
User ID	123456	
Gender	Male	_
Date of Birth	November 12, 1975	
Telephone (Home)	65554444	
Telephone (Office)	67778888	
Address	10 Anson Road #20-10	
Email	abc@hotmail.com	
Last Visit		
- Members of		

Step 3: Click on *Step* 3: Click on save contact information when done.

2.3 Printing Patient Labels

MoCo allows user to perform label printing on standard label type 1029.

To perform label printing, select "Print Label" from the File menu. A dialog box as shown below will appear.

Print Label		×
Select Contact :	Dennis Chang	•
Type of Label :	Label No. 1029 💌	ОК
Position in Label		Cancel
 Left 		
C Right		

Step 1: Select the contact who you wish to print the label of.

Step 2: Make sure the type of label is "Label No. 1029".

Step 3: Select the position within label for printing. Click "OK". The below Print dialog box will appear.

Print		?
Printer		
Name:	Canon MP700 Printer	▼ Properties
Status:	Ready	
Type:	Canon MP700 Printer	
Where:	USB002	
Comment:		Print to file
Print range		Copies
• All		Number of copies: 1 📑
C Pages	from: 1 to: 1	
C Select	ion	11 22 33
Help		OK Cancel

Step 4: Select the appropriate printer name. Click "Properties" button to set the paper size.

🐝 Canon MP700 Printer Properties		2
😂 Main 😂 Page Setup 🙆 Sta	mp/Background 🛛 🎺 Effec	ts 🚰 Profiles 👪 Maintenance 🛛
	📃 Page Size:	A5
	♣ Orientation: ▲	Portrait A C Landscape
	💾 Printer Paper Size:	Same as Page Size
	Printing Type:	Normal-size Printing
	Borderless Printing Amount of Extensit	······································
A5 Normal-size Printing	Duplex Printing Staple Side:	Long-side stapling O Short-side stapling
	Copies:	1 (1-999)
	3	Reverse Order Collate
		Defaults
		OK Cancel Help

Step 5: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 6: Go to Page Setup and set the Page Size to "A5".

Step 7: Click "OK". You will return to the previous Print dialog box.

Step 8: Click "OK" to proceed with the printing.

Chapter 3: Create Message Templates

MoCo's Template Editor allows user to create reusable SMS messages. Frequently used SMS can be saved as template and recalled when needed. User will be able to access the created template by right-clicking of the mouse button in all "Message" text boxes, and then choosing from the options "Insert Template" or "Append Template" to include a template into the message.

To create new templates,

Step 1: Click on button to clear Template Information area.

Step 2: Enter template information (template name and content) into respective fields.

Template Name :	Patient Recall Template	_
Template Content :	Hi < <recipient name="">>, it's time now! You are due for your routine checkup at ABC clinic. Please call us at 6353535 for an appointment.</recipient>	<
	[135 characters]	

Step 3: Click on to save template.

When a template is created successfully, the template name will appear on the List of Templates box.

3.1 Message Tags

MoCo supports the use of "Message Tags" for creating dynamic message content.

List of Templates : Test Template	Template Information-					
	Template Name :	Test Template			-	Add New Template
	Template Name : Template Context :	Hi < <recipient na<="" td=""><td>ane>>, please remember to co <april time="">>, To confirm, rep ABC Dental. Undo Cut Copy Paste Delete Insert Message Tag ></april></td><td>me for your appointment at by SMS "Confirm <<appt Recipient's Name Recipient's Number Originator's Number Originator's Number Specific Ume Appointmer: Date</appt </td><td></td><td>Template Delete Template Update Clear Entries</td></recipient>	ane>>, please remember to co <april time="">>, To confirm, rep ABC Dental. Undo Cut Copy Paste Delete Insert Message Tag ></april>	me for your appointment at by SMS "Confirm < <appt Recipient's Name Recipient's Number Originator's Number Originator's Number Specific Ume Appointmer: Date</appt 		Template Delete Template Update Clear Entries
				Appointment Time Appointment Name		

You can insert message tags into templates by right-clicking of the mouse, and then select "Insert Message Tag" to insert the appropriate message tags.

Currently, MoCo supports the use of the following message tags:

- Recipient's Name This tag shall be used to insert the name of individual recipients at the time of sending.
- Recipient's Number This tag shall be used to insert the mobile phone number of individual recipients at the time of sending.
- Originator's Name This tag is only used in the "Forward to selected Recipients" action of the "Automatic Response System". It shall insert the name of the originator of SMS into the message.
- Originator's Number This tag is only used in the "Forward to selected Recipients" action of the "Automatic Response System". It shall insert the mobile number of the originator of SMS into the message.
- Specific Date This tag is only used in the Scheduler. It shall insert the specific date of the scheduled SMS sending into the message.
- Specific Time This tag is only used in the Scheduler. It shall insert the specific time of the scheduled SMS sending into the message.
- Appointment Date This tag is only used in the Appointment Book. It shall insert the appointment date into the message.
- Appointment Time This tag is only used in the Appointment Book. It shall insert the appointment time into the message.
- Appointment Name This tag is only used in the Appointment Book. It shall insert the appointment name into the message.

Chapter 4: Patient Regular Callback

MoCo can be used to perform patient callback on a regular basis for routine checkup.

4.1 Update patient's last visit & recall date

After every appointment, the clinic's operator shall update the patient's last visit and recall date fields inside MoCo Address Book. These information shall be used for patient recall.

Step 1: Select the patient to be updated from the List of Contacts.

Step 2: Key in the last visit (current date) and the recall date (say 6 months later).

Telephone (Home)	2 C C C C C C C C C C C C C C C C C C C
Telephone (Office)	
Address	
Email	
Last Visit	3/20/2007
Recall Date	9/20/2007
Available for Recall	_
Race	
Nationality	
SMS Subscription	■
Remarks	
- Members of	

Step 3: Click on *Step 3*: Click on *Step 4*: Click

4.2 Perform patient recall

Patient recall can be performed every month. The key to performing patient recall is to retrieve the patients' whose recall date is up and send out sms to them.

To perform recall on patients whose recall date is next month,

Step 1: From "Tools" menu, select "Send SMS" option. You can also click the 🕅 button on the toolbar alternatively.

Step 2: A dialog box as shown below will appear. Type in the message you want to send in the message box provided. The text on the left indicates the number of characters within the message. For "Normal Text" message, one SMS allows 160 characters. For "Unicode (Chinese Text)" message, one SMS allows 70 characters. If the number of characters exceeds the limit, it shall be broken into multiple SMSes before sending out.

_			Send
Recipients			Cancel
Advanced		~	
Message :	This is the message I want to send.	~	
[35 characters]	-		
		_	

Step 3: Alternatively, you can select from a list of message templates by right-clicking the mouse inside the message box. A context box will appear. Move the mouse to "Insert Template" option to select a pre-defined message template.

Message :	I		
		Undo	
		Cut	~
	1	Сору	
Manage T	Normal Text	Paste	
Message Type :	Informativest	Delete	
		Insert Template 🔹 🕨	Test Template
		Append Template	2
		Insert Message Tag 🔸	

Step 4: Select the Message Type of the message you wish to send. If your message contains chinese text, you must select "Unicode (Chinese Text)" option.

Step 5: Click the "Advanced" button.

Step 6: The "Advanced Recipient Selection" dialog box will appear. There are two ways of retrieving patients whose recall date is up.

Method 1: Using "Recall Date" field

Field Name		Search Type	Parameter	<u>^</u>	Search
Recall Date	-	Is within next month	_		And a second second
	-		•		Clear Criteria
	-		•		
	-		•		
	-		•		
	-		-		
	•		-		
	-		-		
	-		-	~	

Method 2: Using "Last visit" and "Available for Recall" fields

Field Name		Search Type		Parameter		^	Search
Last Visit	•	Number of months before today	•	5			And the second
Available for Recall	•	Includes	•	Yes	-		Clear Criteria
	•		•				
	•		•				
	•		•		_		
	-		•				
	-		•				
	•		•				
	•		•			~	

Step 7: Upon clicking the "Search" button, the result shall be displayed on the lower portion of the dialog box.

	i911	S7012345A		Select All
		37012343R		Select All
Foo Chee Yong +65	5969	S7123436B		
Daniel Chua +65	5984	S7234567C		Selected
Eric Boo +65	5819	S7345678D		Contacts
Chang Cheow Joo +65	812	S7456789E		Accession
Hark Loong +65	5982	S7567890F		
Kahshin +65	936	S7678912G		Clear Entrie:
Mun Kiat +65	974	S7789123H		Allection
Wilson Chia +65	5968	S7891234I		

Step 8: Click "Select All" button to select all the contacts retrieved from the search. You can also select a few of the contacts by pressing "Ctrl" key and click on their individual names, then click "Selected Contacts" button.

Step 9: Click "Send" button to send the SMS.

Send SMS			
Recipients Advanced Message : [135 characters]	Dennis Chang,Foo Chee Yong,Daniel Chua,Eric Boo,Chang Cheow Joo,Hark Loong,Kahshin,Mun Kiat,Wilson Chia; Hi < <recipient name="">>, it's time now! You are due for your routine checkup at ABC clinic. Please call us at 6353535 for an appointment.</recipient>	<	Send Cancel
Message Type :	Normal Text	V	

Chapter 5: Appointment Management

5.1 Setting up Auto Appt Confirmation

To set up MoCo for Automatic Appointment Confimation,

Step 1: At Auto Response System page, create a new rule:

les Information
tule Name : Appt Confirmation
Condition
Sender ##ALL##
Advanced
Advanced
Message Pattern
Begins with Confirm
Ends with
Contains
Action
Action Type :
Action Parameters
Auto Reply to Sender
Forward to selected Recipients Type of Message: Invoke External Application
Automatic Shutdown
Export to Text Document
SMS Subscription
Register Contact
Confirm/Cancel Appointment SMS Vote/Contest/Survey
Information Retrieval

Set the sender condition to "All", and message pattern to "Begin with: Confirm".

Select the "Confirm/Cancel Appointment" action, with type of message set to "Confirmation".

Click "Add New Rule" button to add the new rule.

5.2 Configure Appointment Book settings

To access the Configuration Settings dialog, click on the Particle icon on the toolbar or select Configuration Settings from the Tools menu.

Configuration Setting	35	×
Basic General Address Book Scheduler Appointment Book Device GSM Terminal Enterprise Server Settings	Appointment Book Default settings Appt Start Time : 09:00 SMS Preferred Time : 10:30 Appt End Time : 22:00 Default SMS Reminder : 1 Default Priority Level : Medium Send subsequent SMS reminders C Send subsequent reminders inregardless of response Send subsequent reminders to confirmed recipients only Do not send reminders to confirmed/cancelled recipients Iv Automatically insert appointment name Appointment name starts with : A MultiAppt Book Configuration	
	OK Cancel Apply	

On the Appointment Book configuration page, users can configure the following default parameters:

• Default Settings

User can set the default values of :

- Appointment Start / End Time
- o Preferred time to SMS
- Date for SMS Reminder
- o Priority level
- Send Subsequent SMS Reminders

User can determine how MoCo handle subsequent SMS reminders:

- Send subsequent reminders irregardless of response Subsequent SMS reminders shall be sent out no matter the recipients reply back or not
- Send subsequent reminders to confirmed recipients only Subsequent SMS reminders shall only be sent out if the recipients confirmed their appointments (either manually or automatically)
- Do not send reminders to confirmed / cancelled recipients Subsequent SMS reminders shall not be sent out if the recipients has confirmed or cancelled their appointments (either manually or automatically)
- Automatically insert appointment name

Upon creation of new appointment in the MoCo's Appointment Book, an appointment name has to be given. To auto fill the appointment name, check the box "Automatically Insert Appointment Name" and type the name given to each appointment. MoCo will use this name and append a running number at the end to make each appointment name unique.

• Multiple Appointment Book Configuration

ist of Appt Books: Default	Appointment Book Info	
Dr. Matthew Kan Dr. Richard Pang	Appt Book Name :	Add
	Appt Book Description :	Delete
		Update
		Clear Entrie
	1	
	, 	

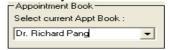
By clicking the "Multi-Appt Book Configuration" button, the above dialog box will appear for you to add / delete / update appointment books.

5.3 Adding, Deleting and Updating Appointment

5.3.1 Add new Appointment

To add a new appointment,

Step 1: Select the Appointment Book within which you wish to add new appointment.



Step 2: Double click on the screen calendar date that you want to create the appointment. A dialog box for adding new appointment will appear.

Step 3: Enter information for the appointment.

Dr. Richard Pang Appointment Book for March 21, 2007	×
Lat of Appointment is a constrained in transition - Appointment Name : A1 Planty : Medium • Subject : Dennis Drang Appointment - Subject : Dennis Drang Appointment - Subject : Of the App	Add New Appointment
End Time: 1000	Appointment
Int SMS Reminder Petered Time to SMS: 10:30 1 Days before appointment Mercage Content : [154 characteri] [155 characteri]	Ces Entires Response
Znd StAS Reminder Preferred Time to SMS: 10.30	Day View
Image Content: Image Content:	

- Appointment Name Appointment name will be used to confirm appointment when recipient reply with SMS message. If the Config Setting for Automatically Insert Appointment Name is set, the appointment name will be auto filled by MoCo.
- Priority You can select from low, medium, high and very high. This is only a color highlight for the appointment subject when you look at the main calendar.
- Subject A brief description of the appointment. The subject text will be displayed on the main calendar.
- Start / End Time The appointment start and end time. Note that the appointment start time can be automatically inserted into the SMS content using message tag <<Appt Time>>.
- Remarks Additional (optional) remarks.
- SMS Reminder Click this checkbox to enable sending of SMS reminder.
- Recipients/Advanced Select the recipients for the appointment reminder SMS. You can select from a list of contacts/contact groups (using Recipient button), or via querying the Address Book (using Advanced button).
- $1^{st}/2^{nd}/3^{rd}$ SMS Reminder Click this checkbox to enable sending of first/second/third SMS reminder.
- Preferred time to SMS The preferred time to send out reminder SMS. You can set the number of days/weeks before the actual appointment date to send the reminder sms.
- Message Type Select from Normal Text, 8-Bit Data and Unicode (Chinese Text). For normal english sms, choose Normal Text. For content containing chinese text, choose Unicode.
- Message Content Actual message content to be sent. You can insert template or type in directly.

Step 4: Click on second to create appointment.

When an appointment is created successfully, the appointment's start date, end date and subject will appear on the main calendar.

5.3.2 Delete Appointment

To delete an appointment,

Step 1: From the calender view, double click on the appointment entry to be deleted. Alternatively, from the Appointment dialog, select the appointment to delete from List of Appointments.

Appointment to delete the highlight appointment. Step 2: Click on

5.3.3 Updating Appointment

To update an appointment,

Step 1: From the calender view, double click on the appointment entry to be updated. Alternatively, from the Appointment dialog, select the appointment to update from List of Appointments.

Step 2: Replace the information to be updated.

Step 3: Click on to save the changed information.

5.3.4 Changing Appointment Date

To change an appointment,

Step 1: From the calender view, double click on the appointment entry to be updated. Alternatively, from the Appointment dialog, select the appointment you wish to change date of from the List of Appointments.

Step 2: Click on to change the appointment's date.

Step 3: A dialog box shown below will appear. Enter the new Appointment Book name, Appointment Date, Appointment Start and End Time. Then click "Ok".

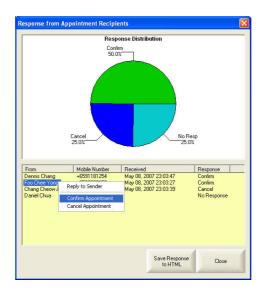
Change Appointment D	ate	
Appointment Book Name :	Dr. Richard Pang	•
New Appointment Date :	10/30/2007 👻	
Start Time :	09:00	
End Time :	22:00	
ОК	Cancel	

5.4 Check Response

To check a confirmation response,

Step 1: Double click on the appointment.

Step 2: Click on to open the response dialog. Check under the Response column for result.



Upon right-clicking on the appointment recipient's name, a context box appear displaying the following options:

- Reply to Sender Select this option to invoke a dialog box for you to send sms reply to the sender.
- Confirm Appointment Do a *manual appointment confirmation*. This option is useful if the customer confirm his appointment via phone call or other means instead of sms.
- Cancel Appointment Do a *manual appointment cancellation*. This option is useful if the customer cancel his appointment via phone call or other means instead of sms.

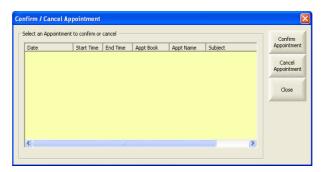
To save the response information into a HTML report, just click "Save Response to HTML" button.

5.4.1 Do manual Appt Confirmation at Transaction Manager

From	Message	Received	Status	Route To	Terr
Dennis Chang	Literatived upur massaria	March 20, 2007 11:16:31	OK	ALL	525
	Reply to Sender				
	Forward message				
	Delete Records				
	Confirm/Cancel Appointment				
	Contrining Cancer Appointment				
<					

The following options are available when you right-click on any records in the Transaction Manager InBox:

- Reply to Sender A dialog box will appear for you to send reply to the selected sender.
- Forward message A dialog box will appear for you to forward the message to other recipients.
- Delete Records Use this option to delete one or more records. Alternatively, you can use the "Delete" key to perform deletion.
- Confirm / Cancel Appointment A dialog box will appear, displaying a list of appointments of the sender.



To confirm/cancel any appointment, just click on the item and then click "Confirm Appointment" or "Cancel Appointment" buttons. This feature is useful in updating the Appointment Book when customers make appointment confirmation via phone call rather than sms.

5.5 View Appointment History

Step 1: Click on Advance Appointment Advance A

Step 2: Select the name of the contact. Click the **Search** button.

ipient			Export to File
			Export to File
ment's Subject			Cancel
start Time End T	ime Appt Book	Appt Name	Subject
.9:00 10:00	Dr. Richard Pa	ng Al	Dennis Chang Appointmen

Step 3: To save the appointment history to file, click "Export to File" button.

5.6 Import Appointment List

Step 1: Click the Appointment. An Open File dialog box will appear for you to load to Appointment list file. MoCo expects a csv (comma-separated-values) file for importing appointment.

Open							? 🛛
Look in:	Co TestBe	d	•	(÷	d 🖥	•	
My Recent Documents Desktop My Documents	Superior Addriba Export Addriba Minopot Addriba Minopot Addriba Minopot Addriba Minopot Addriba Minopot Addriba Minopot Addriba Minopot Addriba	iok.csv iok.l.csv iok.3.csv iok.3.csv iok.4.csv iok.4.csv iok.5.csv					
My Network Places	File name: Files of type:	Comma Separated Values Files	(".cs	v)	•		Open Cancel

A typical Appointment Import file (*.csv) should contain the following fields (not in any order):

- Customer Name
- Customer Mobile Number
- Appointment Start Time (in 24-hour format HH:MM)
- Appointment Book Name (Optional)
- Appointment Duration in minutes (Optional)

All records within a single Appointment Import file should belong to the same appointment date. Each of these fields shall be separated by a comma, and each record separated by a carriage return.

Step 2: Upon selecting the Appointment Import file (*.csv), a dialog box as shown below will appear, displaying all the columns within the import file.

Seneral Appointment Information		Recipient Name	 Appt Book Name 	💌 Recipient Mobile No.	 Appt Start Time 	
Appointment Date : 3/21/20	07 💌	Jorgen Winum	Dr. Richard Pang	96280000	"08:30"	
		Swee Pin Er	Dr. Richard Pang	98520000	"09:00"	
Default Priority : Med	dium 💌	Mark Kum Choon Woo	Dr. Richard Pang	96461111	"09:30"	
Duration (Minutes) : 30	_	Amy, Geok Huay Chia	Dr. Richard Pang	91772222	"10:00"	
Duration (minutes) : 50		Philip Chew Poo Tan	Dr. Richard Pang	97543333	"11:30"	
Preferred SMS Time :		Teng Phuan Chua	Dr. Richard Pang	97114444	"12:00"	
		Kian Heng Chua	Dr. Richard Pang	90675555	"13:00"	
10:30 1 Days	▼ before Appt.	Grace Mei- En Lim	Dr. Richard Pang	92786666	"14:00"	
		I Gek Quek	Dr. Richard Pang	98577777	"14:30"	
Message Type : Normal T	ext 💌	Mong Siang Ong	Dr. Richard Pang	91212324	"15:00"	
Message Content : [154 chara	ectorel	Choo Keow Biao	Dr. Richard Pang	98757777	"16:00"	
		Choo Keow Boon	Dr. Richard Pang	98758888	"17:00"	
Hi < <recipient name="">>, you h appointment with us at <<appt< td=""><td>Date>>,</td><td><</td><td></td><td></td><td></td><td>></td></appt<></recipient>	Date>>,	<				>
< <appt time="">>. To confirm, re "Confirm <<appt name="">>" Al</appt></appt>		Import Process Logger				
	De Donicar]	C:\Temp		Save as	Import	t

Step 3: Select the field names (Eg. Recipient Name, Appt. Book Name, etc) for the columns that you wish to import.

Step 4: At the "General Appointment Information" portion on the left, enter the following information:

- Appointment Date The appointment date for the appointments to be imported.
- Default Priority Priority level of the appointments to be imported. You can use the default value.
- Duration The appointment duration in minutes. If your appointment import file does not contain any information on appointment duration, you can set a standard duration here for all the appointments to be imported.
- Preferred SMS Time The time and number of days/weeks before appointment which you wish to send out SMS.
- Message Type Select from Normal Text, 8-Bit Data or Unicode (Chinese Text). For normal english content, use Normal Text. If content contains chinese characters, use Unicode.
- Message Content The actual message content to be send out via SMS. You can insert template here or key in the text directly.

Step 5: Under the "Import Process Logger" portion, you can save a report of the import process of checking "Save import process report" checkbox. You can also specify the folder which you wish to save the import process report.

Step 6: Once all the information are checked to be correct, you can click the "Import" button to proceed with the import process. Upon successful import, you will see the below message box.



5.7 Print Appointment List

MoCo allows user to perform print appointment list on standard A4 paper.

To perform appointment printing, select "Print Appointment Book" from the File menu. A dialog box as shown below will appear.

Dr. Matthew Kan, Dr. Richard Pang	Print
19/03/2007	Cancel
23/03/2007	
Low, Medium, High, Very High	
	19/03/2007 23/03/2007

Step 1: Select the appointment book name which you wish to print.

- Step 2: Select the starting/ending dates of appointments to print.
- Step 3: Select the priority level of appointments to be printed.

Step 4: Click **Print**. A Print dialog box as shown below will appear.

Print		?)
Printer		
Name:	Canon MP700 Printer	Properties
Status: Type: Where:	Ready Canon MP700 Printer USB002	
Comment:		Print to file
Print range		Copies
• All		Number of copies: 1 🛨
C Pages C Select		11 22 33
Help		OK Cancel

Step 5: Select the appropriate printer name. Click "Properties" button to set the paper size.

🐲 Canon MP700 Printer Properties		<u>?</u> ×
🕲 Main 😂 Page Setup 🙆 Star	mp/Background 🛛 🥩 Effec	ts 📴 Profiles 👪 Maintenance
	Page Size:	A4
	↓ Orientation: ▲	Portrait A C Landscape
	Printer Paper Size:	Same as Page Size
	Printing Type:	Normal-size Printing
	Borderless Printing Amount of Extension	" 🕱 <u>' ' j '</u> 🔟
A4 Normal-size Printing	Duplex Printing Staple Side:	C Long-side stapling C Short-side stapling
	Copies:	1 🚊 (1-999)
	S	Reverse Order Gollate
		Defaults
		OK Cancel Help

Step 6: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 7: Go to Page Setup and set the Page Size to "A4".

Step 8: Click "OK". You will return to the previous Print dialog box.

Step 9: Click "OK" to proceed with the printing.

Chapter 6: Accounts System

MoCo has a built-in Accounts System for user to perform some simple accounting tasks.

To invoke the Accounts System, select "Accounts System" from the Tools menu. A dialog box as shown below will appear.

2 · · · · · · · · · · · · · · · · · · ·		Ref. No.	Date	Client Name	Туре	Description	Amt Paid	P
Today's Transaction		REF00000004	August 07, 2007 13:3	2:10 Peter Tan	Products	Something ABC	25.00	C
Current Month's Transac	tion	REF00000004 REF00000004	August 07, 2007 13:3 August 07, 2007 13:3		Products Services	Something DEF Consultation A	35.00 30.00	0
	.cion	REF00000004	August 07, 2007 13:3 August 07, 2007 13:3		Services	Consultation B	50.00	0
C Customized Period								
From: 8/ 7/2007	v							
To: 8/ 7/2007	-							
Other Options								
Payment Type :								
All	<u> </u>							
Account Type :								
Products, Services	-	<						3
Appt Book Name :		Morning Balance	: 0.00	Afternoon Balance:	140.00	Night Balance:	0.00	-
	100	Morning balance	. 10.00	Mitcifficer balance.	1140.00	Nigric Dalarice.	10.00	
Dr Sob								
Dr Soh	-	Total Balance:	140.00					

6.1 Add New Transaction

Step 1: Click "Add New Transaction" button. A dialog boz as shown below will appear.

Account I	formation					
Referenc		REF0000005	Assistant Nam	e : Eddy		
Client / S	upplier :	John Chan	Remarks :		~	
Payment	Type :	Cash	•		~	
Appt Boo	k:	Dr Soh	✓ Last Modified			
Туре		ription			Amount Paid	
Products Services	▼ Prod				50 100	
bervices	 ■ Serv ■ 	ILE XTZ			100	
	•					
	•					
	-					ľ
	•					
	-					
	•					
	-					
					1	
				Sav	e Cance	

Step 2: Key in the accounts information. For expenses, you can add a minus sign in front of the Amount Paid value.

Step 3: Click "Save" button to add the account.

6.2 Manage existing account items

Ref. No.	Date	Client Name	Туре	Description	Amt Paid
REF00000004	August 07, 2007 1	3:32:10 Peter Tan	Products	Something ABC	25.00
REF00000004	August 07, 2007 1		Products	Something DEF	35.00
REF00000004	A	3:32:10 Peter Tan	Services	Consultation A	30.00
REF00000004	Modify	3:32:10 Peter Tan	Services	Consultation B	50.00
	Delete				
	Print Receipt				

To manage existing account item, right-click on the item and a context menu will appear for the following options:

- Modify Select this option to modify the information of the account item.
- Delete Select this option to delete the account item.
- Print Receipt Select this option to print receipt for this account item. Remember to set the paper size as 'A5'.

6.3 Query Account System

Today's Tran		
Current Mon	th's Transact	ion
Customized I	Period	
From:	8/ 7/2007	-
To: 1	8/ 7/2007	-
Other Options		
Payment Type	:	
All		-
Account Type		
Products, Ser	vices	-
Appt Book Nan	ne:	
Dr Soh		-
Jorson		

At the Display Options, select the query parameters and click "Search" button. The list of account items that satisfy the query parameters will be displayed, together with the calculated balances.

6.4 Accounts Settings

Settings			×
Morning Timings :	12:00 AM	* to 11:59 AM	*
Afternoon Timings :	12:00 PM	to 05:59 PM	•
Night Timings :	06:00 PM	• to 11:59 PM	•
	Save	Cancel	

By clicking the Setttings button on the Accounts System dialog box, the above dialog box will appear. You can set the individual timings and click Save button. The timings shall affect the calculations of individual balances.

6.5 Save Accounts Sheet

By clicking the "Save Account Sheet" button on the Accounts System dialog box, you can save the currently displayed account sheet to a HTML file.

Chapter 7: Medication / X-Ray Records

MoCo has a built-in system for user to manage their medication/X-ray records. This feature is only available in the version for dentist/specialist/medical clinics.

To invoke the Medication/X-Ray system, select "Medical/X-Ray Records" from the Tools menu. A dialog box as shown below will appear.

play Options	Date	Patient Name	NRIC	Туре	Description
Today's Records Current Month's Record Customized Period To: 0/ 7/2007 COMPARENT Record Type : All Call Call Call Call Call Call Call	August 01, 2007 16:01:29 August 01, 2007 16:53:59	Dennis Chang Chee Yong	575343542 57534343A	Medication Medication	Erythromycin: 5, Amoxycillin: 3 Metenamic Acid: 3, Metronidazole: 3
Search					Add Record Manage Medical or X-ray item

7.1 Add Record

Step 1: Click "Add Record" button. A dialog boz as shown below will appear.

ient Name :	Daniel Chua			<u> </u>	Save
:C :	S7987654A				-
e:	Medication		•		Cancel
edication / X-	Ray				
Name of Medi	cation/X-Ray		Quantity	^	
Amoxycillin		•	3		
Chlorhexidine	MW	•	5		
		•			
		•			
		_			
		•			
		•			
		* *			

Step 2: Key in the record information.

Step 3: Click "Save" button to add the account.

7.2 Manage existing records

Dennis Chang Modify Delete	57534354Z 57534343A	Medication Medication	Erythromycin: 5, Amoxycillin: 3 Metenamic Acid: 3, Metronidazole: 3

To manage existing medication/X-ray record, right-click on the item and a context menu will appear for the following options:

- Modify Select this option to modify the information of the item.
- Delete Select this option to delete the item.

7.3 Query System

 Current 	Month's Record	
Custom	ized Period	
From:	8/ 7/2007	-
To:	8/ 7/2007	-
Other Opt	ions	
Record Ty	pe:	
All		-
Patient Na	me :	
		-

At the Display Options, select the query parameters and click "Search" button. The list of records that satisfy the query parameters will be displayed.