

Front Desk 2014

Practice Management System

Installation Guide

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Installing Front Desk 2014 - Single Licence

To install the Front Desk 2014 - Practice Management System you will require the Front Desk 2014 CD, which will be supplied by Smartsoft (Australia) Pty Ltd.

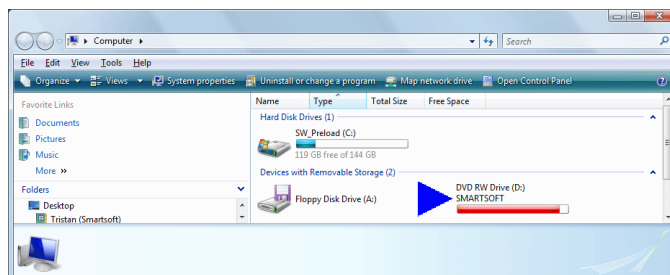
If you have already installed the Front Desk 2014 Demo Version, **DO NOT** install the full version. Please contact Smartsoft so we can check that you have the latest version and replace the demo data with a clean system.

Insert the Front Desk 2014 CD into your CD/DVD Drive

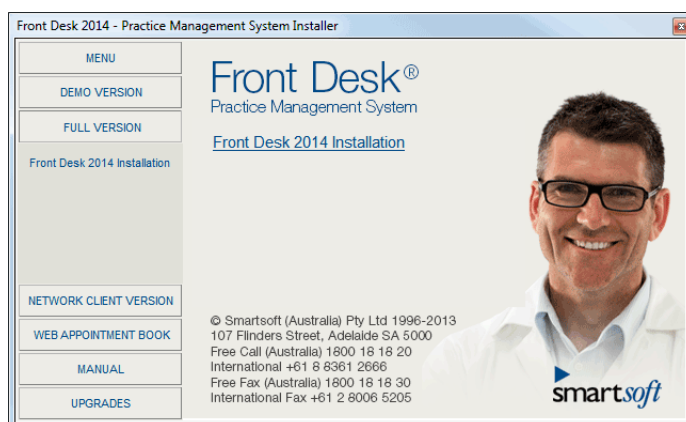
The dialog below will appear on your screen.



Please note: If the screen above does not appear, you will need to activate the Front Desk 2014 CD manually. To do this, double click on **My Computer**, a screen will appear as shown below. Double click on the CD/DVD drive labelled **Smartsoft**.



Select **Full Version** from the left hand side menu and then select the **Front Desk 2014 Installation** option.



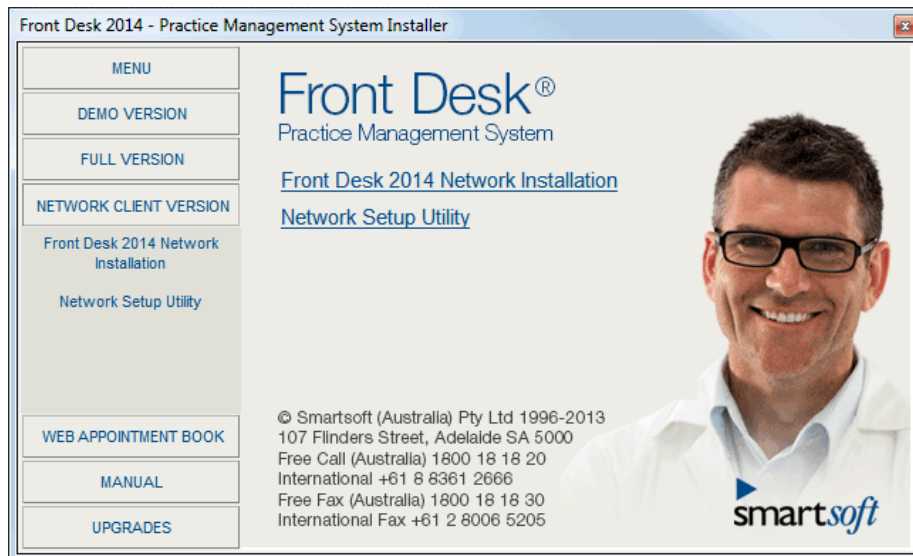
The Front Desk 2014 (Full Version) program will now begin to install.

Congratulations, you have successfully installed the *Front Desk 2014 – Practice Management System*.

Installing Front Desk 2014 - Network Licence

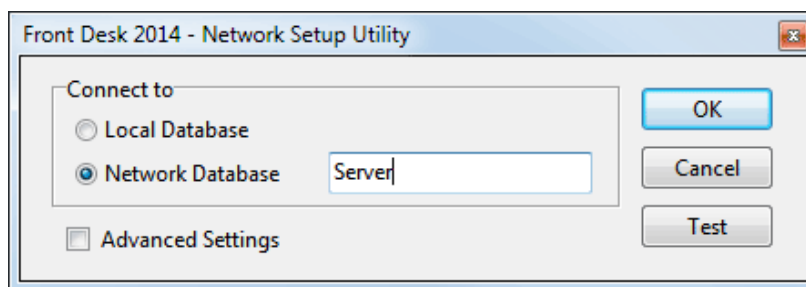
Front Desk 2014 - Practice Management System can be used in a multi-user environment on an office computer network. Additional network licences are required for this type of installation. The **Network Client Version** of Front Desk 2014 should be installed on the second and subsequent computers.

Insert the Front Desk 2014 CD into your CD-ROM.
Select **Network Client Version** from the left hand side menu and select **Front Desk 2014 Network Installation**



This will install the application to run Front Desk 2014 as a network version.

When the installation is complete, the following **Network Setup Utility** dialog will appear.



To use the database on the client computer select the **Local Database** option.

If your database is on another computer select **Network Database**. Click on the browse button to nominate the specific computer name.

Once you have selected the database location click **Test** to check your database connection.

Congratulations, you have successfully installed the *Network Version of Front Desk 2014*.

Installing Front Desk 2014 - Web Appointment Book

The Front Desk Web Appointment Book is a web based read only appointment book, which can be used to view the Front Desk appointment book via a web browser.

To install the Front Desk Web Appointment Book you will need to have Internet Information Services (IIS) running on your machine. **NOTE – The installation and management of IIS or access to the Front Desk Web Appointment Book over the Internet is outside the normal scope of the support provided by Smartsoft and may require the assistance of your hardware/network technical people.** (A basic guide on installing IIS on Windows Vista/Windows 7 has been included for illustration purposes).

A prerequisite for installing the Front Desk Web Appointment Book is one of the following operating systems:

- Windows Server 2003
- Windows Server 2008
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Vista Home Premium (or above)
- Windows 7 Home Premium (or above)
- Windows 8/8.1

and

- Internet Information Services (IIS) installed and running on the machine you wish to host the website

STEP 1

You need to install this package on the computer hosting the web site, which may or may not be the machine hosting the Front Desk database.

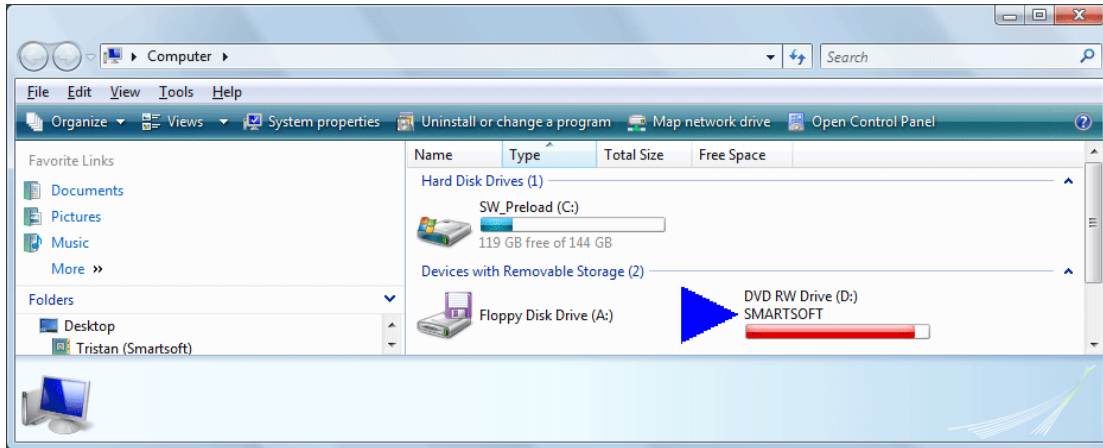
Insert the Front Desk 2014 Version 16.0 CD into your CD/DVD.

The dialog below should automatically appear on your screen.



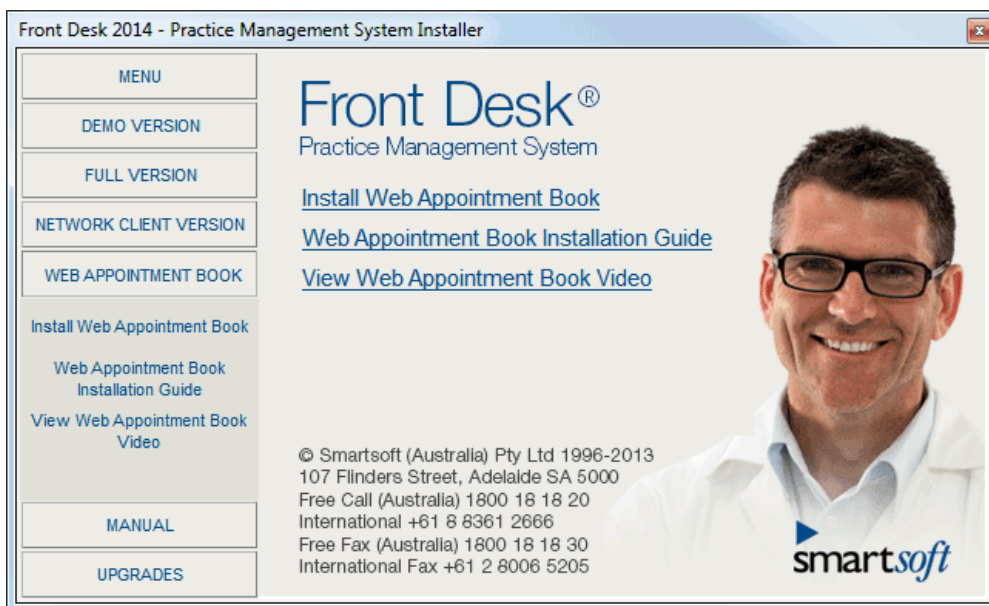
Installing Front Desk 2014 - Web Appointment Book

Please note: If the dialog above does not appear automatically you need to activate the Front Desk CD manually. Double click on **My Computer**, a screen will appear as shown below. Double click on the CD/DVD drive labelled **Smartsoft**.



STEP 2

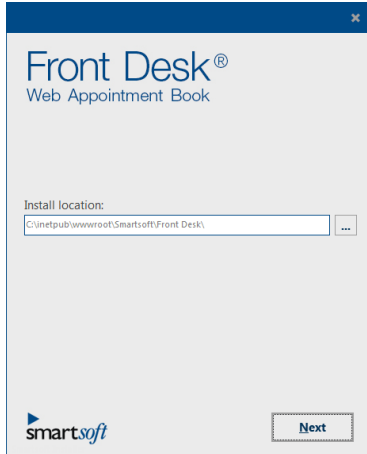
From the left hand side menu select **Web Appointment Book** and then click the **Install Web Appointment Book** option.



Installing Front Desk 2014 - Web Appointment Book

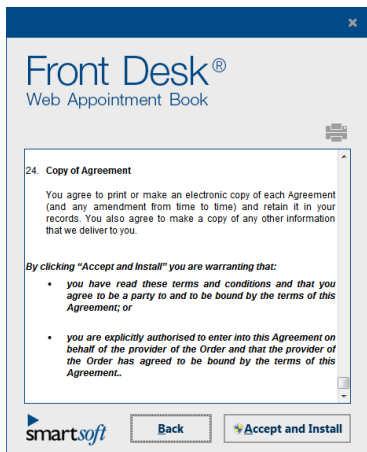
STEP 3

The following dialog will appear on your screen. Click **Next** to continue.



STEP 4

Please read and accept the End-User Licence Agreement and then click **Accept and Install**.

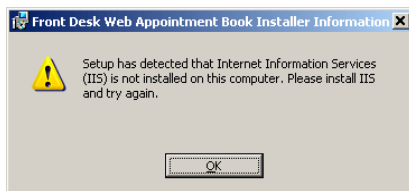


This install should take approximately 5 minutes.

We recommend that you install the Web Appointment book in the default destination folder.

Click the **Finish** button when prompted.

If you see the following message you will need to install Internet Information Services (IIS). Please follow the steps below to do this or go to **Step 5** if you do not see this message.

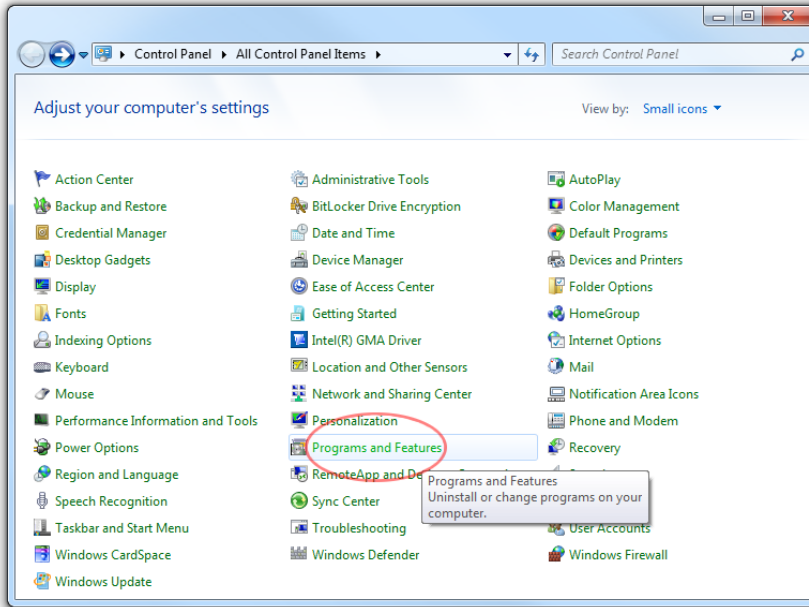


Installing Front Desk 2014 - Web Appointment Book

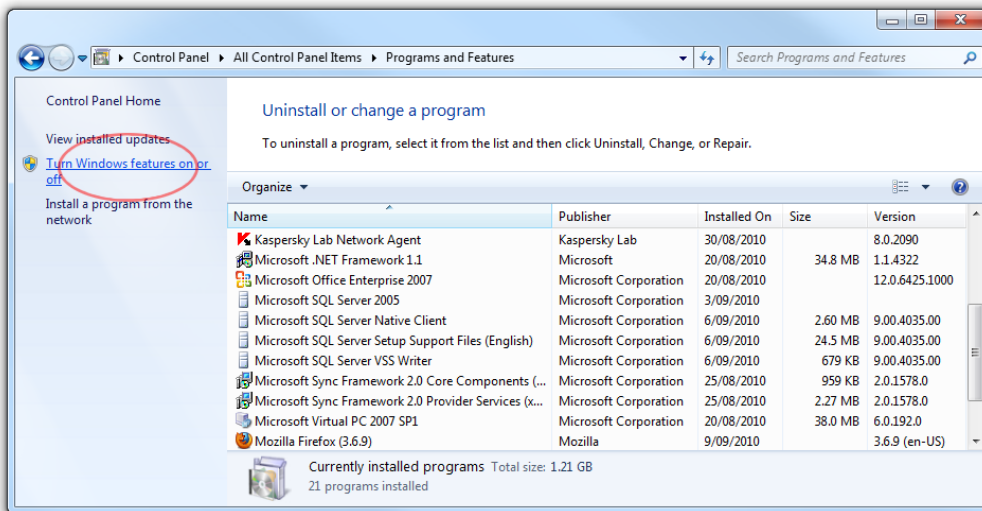
STEP 4

IIS Installation for Vista/Windows 7/Windows 8:

Go to the Control Panel and select Programs and Features.

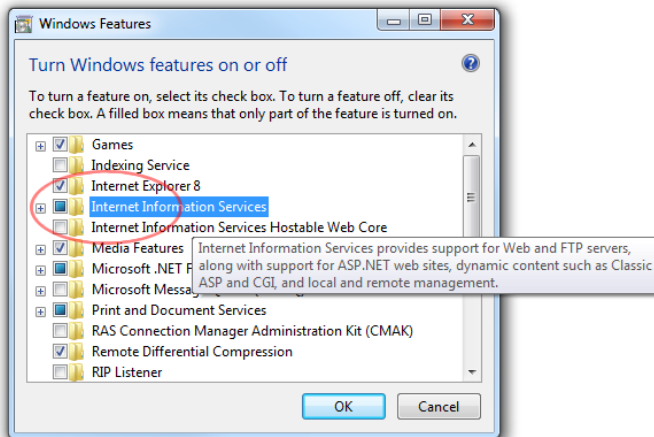


Select Turn Windows features on or off.

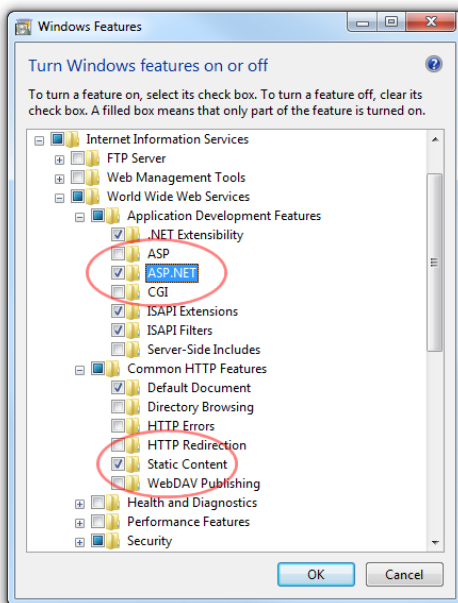


Installing Front Desk 2014 - Web Appointment Book

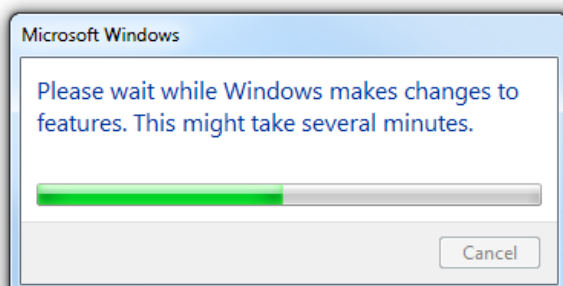
Select Internet Information Services and click on the checkbox to mark it for installation. You will also need to click the “+” icon to open its installation options.



Please ensure that the ASP.NET and Static Content options are both checked. Click OK when done to install Internet Information Services (IIS). Windows may ask you to insert the Windows CD to enable installation of the components selected.



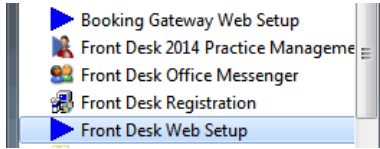
Internet Information Services will then be installed.



Installing Front Desk 2014 - Web Appointment Book

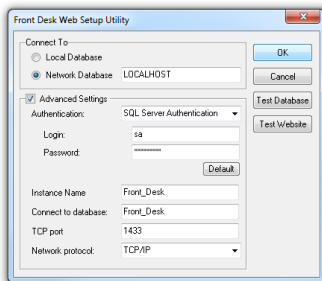
STEP 5

Once you have successfully completed the installation you will find an additional icon **Front Desk Web Setup** under Smartsoft in the Programs list of your computer



Click **Front Desk Web Setup** and select the location of the Front Desk database.

Select **Local Database** if the Front Desk database is on the same machine or **Network Database** to select another computer on your network by either entering the machine name or network IP address of this machine.



Once you have selected the database location click **Test Database** to check your database connection, to test the Website click **Test Website**.

Click **OK** to save your configuration settings.

To access the Web Appointment Book from outside of the clinic, port forwarding will need to be setup in your modem/router. Please refer to your technical support specialist for assistance.

STEP 6

Running the Web Appointment Book on a PC

To run the *Front Desk 2014 Web Appointment Book* on a PC, open up your web browser (e.g. Internet Explorer) and type *localhost/frontdesk* or *computername/frontdesk* in the address bar where *computername* is the name of the computer hosting the Front Desk Web Appointment Book.

Running the Appointment Book on a Mobile/PDA device

To run the *Front Desk 2014 Web Appointment Book* on a mobile device, such as an iPhone or Android phone, open up your web browser and type *localhost/frontdesk/mobile* or *computername/frontdesk/mobile* in the address bar where *computername* is the name of the computer hosting the Front Desk Web Appointment Book. On older style smartphones (e.g. Blackberry or Nokia devices) enter *localhost/frontdesk/pda* or *computername/frontdesk/pda* in the web browser.

Congratulations, you have successfully installed the *Front Desk 2014 Web Appointment Book*.

How do you plan to back up your data?

It is very important to backup the data from any system that contains valuable information.

Users must make daily backups of the data contained in *Front Desk 2014 - Practice Management System*.

In the unlikely event of a serious hardware fault, theft, fire or accidental deletion of files, your data may be restored from a previous backup.

Front Desk 2014 offers a built in fast backup to make this task easy.

Flash Drives



RECOMMENDED

USB flash drives can be connected directly to a computer's USB port without cables and act as storage devices. These pocketable drives offer a good way of exchanging data between any PCs. They come in various storage capacities however we recommend a minimum of 4 GB.

External HDD USB or Ethernet



RECOMMENDED

External USB / Ethernet Hard Disk Drives are a good way to back up your data in Front Desk 2014. They are safe, fast and easy to use, especially in a network environment.

Tape Backup Drive



RECOMMENDED WITH CAUTION

This type of backup requires expert technical knowledge to be set up and used correctly. Users must contact Smartsoft for a special additional utility, provided at no charge, or use specialised backup software which is capable of backing up MS SQL Server data.

Cloud Offsite Backup



RECOMMENDED WITH CAUTION

This type of backup requires expert technical knowledge to be set up and used correctly. Users must contact Smartsoft for a special additional utility, provided at no charge, or use specialised backup software which is capable of backing up MS SQL Server data.

CD / DVD Writers



NOT RECOMMENDED

We do not recommend CD / DVD writers, as backing up and managing your CD / DVD media is not a trivial process. They can also be easily damaged if not handled correctly. Many hardware suppliers will unknowingly recommend this type of backup not completely understanding how it will be used. Our experience has shown that this is a poor choice for backing up data in Front Desk 2014.

If any assistance is required in developing your backup strategy, please contact our technical staff on 1800 18 18 20 or frontdesk@smartsoft.com.au

Training Check List

Prior to booking your telephone training sessions with Smartsoft, please check that the following has been completed.

- Install the Full Version of *Front Desk 2014* and registered your clinic name.**
Instructions are on Page 3 (Contact Smartsoft to obtain a clinic name password.)
- Check that you can connect to the internet.**
- If you plan to use a speaker phone for the telephone training, check that this is correctly set up.**

During the Front Desk Multimedia CD training you will require the following information:

- **Clinic Details** - clinic name, address, phone numbers, A.C.N and A.B.N
- **Fee Categories** - a list of different fee rates or categories that apply to your practice
- **Item Codes** - a list of codes for every service and non-service provided at your practice. *If you do not have a list of Item Codes you can obtain a copy from your Professional Association or health fund.*
- **Bank Account details** - account name, branch and account numbers
- **Practitioners** - provider numbers, qualifications, title.
- **General Info** - Clinic shifts, appointment book start and end times, appointment time intervals

If you are having difficulties with the multi media training, we can complete this during the first telephone training session.

Please do not hesitate to contact the staff at Smartsoft to assist you through the set up of *Front Desk 2014 – Practice Management System*.