# **CRM User Guide**

Sycle Private Practice



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# **Table of Contents**

| 1. Overview                            | 1  |
|--|----|
| 2. Configuration                       | 2  |
| 2.1. Assigning the Marketing Privilege | 2  |
| 2.2. Assigning a CRM Role              | 4  |
| 3. Customer Care Mail                  | 5  |
| 3.1. Manage Your Logos                 | 5  |
| 3.2. Manage Your Signatures            | 6  |
| 3.3. Create New Mail Pieces            | 7  |
| 4. Mail Queue                          | 14 |
| 5. Mail History                        | 15 |
| A. Document Revision History           | 16 |



# **1.** Overview

The CRM module is accessed via the Marketing tab.



The CRM module is divided into the following main areas:

• Customer Care Mail (Customer Care Mail, page 5) displays the number of current patients (and the number of valid/invalid addresses) and lists your active/inactive mail pieces. This page is where you can configure mail pieces, manage your logos, and set up your signatures.



- Mail Queue (Mail Queue, page 14) displays all the campaigns generated for active mail pieces. This page allows you to review your approval dates; preview, edit, and deactivate letters; and edit the list of patients that are marked to receive letters.
- Mail History (Mail History, page 15) displays the list of campaigns that have already been sent or have passed the campaigns' mail dates.

| Mail History             | Reactivate  | Ехро             | rt   | Preview | Maple       |               |         | ~               |         |   |
|--------------------------|-------------|------------------|------|---------|-------------|---------------|---------|-----------------|---------|---|
| Campaign                 | Mail Date   | Canceled<br>Date | Cost | Clinic  | ln<br>House | Mail<br>House |         |                 |         | θ |
| September Sales          | Sep 13 2018 | -                | \$0  | Maple   | 2           | -             | Preview | Export List Rea | ctivate |   |
| Manufacturer<br>Warranty | Dec 04 2018 | -                | \$0  | Maple   | 1           | -             | •       | •               | •       |   |



# 2. Configuration

Settings and permissions are configured from pages accessed via the Administration tab.

### 2.1. Assigning the Marketing Privilege

Privileges control a staff member's access to certain features and functions within Sycle Private Practice.

These instructions walk you through adding the **Marketing** privilege to a user. This privilege allows the staff member to be assigned a CRM Role (Assigning a CRM Role, page 4) and view Marketing reports.

- 1. Navigate to the Administration screen.
  - On the top navigation bar, click the **administration** tab.



2. In the *staff* section, select the staff member. You can enter a full or partial name in the field to help locate the staff member.



3. Click Edit to open the Edit Staff screen.

| staff                     |   |      |
|---------------------------|---|------|
| John Doe                  | ~ | edit |
| Create a new staff member |   |      |

4. Navigate to the **privileges** section.



5. Select the **Marketing** flag to enable the privilege for the user.





Some flags may not be visible on your instance of Sycle Private Practice. The availability of some flags is subject to whether a feature is enabled for your instance.



Privilege flags may be enabled or disabled automatically when a change is made in the **Type** field. The list of privilege flags available to select for a staff member is controlled by the selection made in the **Type** field.

- 6. Click save.
- 7. Click **close** to return to the **Administration** screen.



# 2.2. Assigning a CRM Role

After enabling the **Marketing** privilege for a user (Assigning the Marketing Privilege, page 2), that user can be assigned a **CRM Role**. This role controls the level of access the user has to CRM features.

- 1. Navigate to the Administration screen.
  - On the top navigation bar, click the **administration** tab.
- 2. On the Administration screen, select  $CRM \rightarrow CRM$  Permission to open the CRM Configuration screen.

| <u>Legal Entity</u>          |      |
|------------------------------|------|
| CRM<br><u>CRM Permission</u> |      |
| Appointment Remin            | der: |

3. On the CRM Configuration screen, navigate to a user with the Marketing privilege enabled.



Users without the **Marketing** privilege can not be assigned a **CRM Role**. To assign a user the **Marketing** privilege, refer to Assigning the Marketing Privilege, page 2.

4. Assign the user a **CRM Role**. This can be one of **Read Only**, **Read and Write**, or **Read**, **Write**, **and Approve**.

| CRM Configuration |                             |  |
|-------------------|-----------------------------|--|
| Staff             | <b>Marketing Privileges</b> | CRM Role   |
| Adam Adamson      | Yes                         | Read, Write, and Approve 🗸                               |
| Adam Ademsun      | No                          | User must have Marketing privileges to assign a CRM Role |

- 5. Click save.
- 6. Click **close** to return to the **Administration** screen.



# **3. Customer Care Mail**

The **Customer Care Mail** section of the CRM module is where you can configure mail pieces, manage your logos, and set up your signatures.

By default, this section includes several inactive "stock" mail pieces. These can be reviewed as reference material or edited to meet your needs. You can create new mail pieces rather than use the provided stock mail pieces.

Sycle suggests configuring your logo and signature first during the initial setup of **Customer Care Mail**.

### 3.1. Manage Your Logos

1. Open the CRM module by clicking the **Marketing** tab.



2. On the *Customer Care Mail* page, click **Manage Your Logos** to open the *Manage Your Logo & Signatures* screen.



- 3. Under Manage Your Logo & Signatures  $\rightarrow$  Logo, select a clinic or clinics in the Assign Clinic field.
- 4. Click **Choose File** and select the logo image.



The logo file must be one of **.png**, **.gif**, **.jpeg**, **.pjpeg**, **.x-png**, or **.jpg**. The filesize must be less than 100 KB.

The logo's file name will be used to select the logo when creating new mail (Create New Mail Pieces, page 7). If you use multiple logos, ensure you use a descriptive file name.



5. Review your logo in the Preview area. Click Submit.

| Manage Your Logo & Sign                               | atures  |
|---|---------|
| Logo  | Preview |
| Assign Clinic<br>Test Clinic<br>Choose File<br>Submit | S       |

#### 6. Click Save & Close.

Your logo will now appear under *Manage Your Logo & Signatures*  $\rightarrow$  *Logo*  $\rightarrow$  **Uploaded Logo**, and can be used in mail pieces.



Uploaded logos can be deleted by hovering over them with the mouse and selecting **Delete**.

### 3.2. Manage Your Signatures

1. Open the CRM module by clicking the **Marketing** tab.



- 2. On the *Customer Care Mail* page, click **Manage Your Signatures** to open the *Manage Your Logo & Signatures* screen.
- 3. Under Manage Your Logo & Signatures → Signature, select a staff member in the Select Staff Member field.
- 4. Do one of the following:
  - Select a font in the Select Font For Signature field.
  - Click Choose File and select an image of the signature.



The signature file must be one of **.png**, **.gif**, **.jpeg**, **.pjpeg**, **.x-png**, or **.jpg**. The filesize must be less than 100 KB.



5. Review your signature in the **Preview** area. If you used an image in Step 4, click Submit.



#### 6. Click Save & Close.

If you did not upload an image in Step 4, the signature generated with the chosen font can be used in mail pieces.

If you used an image in Step 4, your signature will now appear under Manage Your Logo & Signatures  $\rightarrow$  Signature  $\rightarrow$  Uploaded Signature and can be used in mail pieces.



Uploaded signatures can be deleted by hovering over them with the mouse and selecting **Delete**.

## **3.3. Create New Mail Pieces**

Creating new mail pieces consists of:

| Compose Letter, page 7             | Naming and adding logos to the letter; writing the body of the letter<br>(with optional parameters to populate the letter with data from your<br>clinic's database), and selecting signatures. |
|------------------------------------|--|
| Define Schedule & Audience, page 9 | Defining the mail piece's schedule and audience.   |
| Preview & Confirmation, page<br>11 | Review your letter and configure how the letter will be handled  |

#### **Compose Letter**

- 1. Enter a name for the letter in the Create New Mail  $\rightarrow$  Compose Letter  $\rightarrow$  Name Your Letter field.
- 2. Select a logo in the [Clinic Name] Logo field.



You can also upload a new logo by clicking **Edit** beside the **[Clinic Name] Logo** field. Refer to Manage Your Logos, page 5 for more information on uploading logos.



#### 3. Write your letter in the **Type Your Message** field.

Use the **Insert Parameter** field to populate the letter with data from your clinic's database, such as the patient's name or your clinic's phone number.



Changing the font size of the parameter will affect the size of the data displayed by the parameter. For example, a increasing the font size of the **[signature]** element will increase the size of an uploaded signature image.



A patient will not be added to a campaign if the patient does not have valid data for a parameter used in the body of the letter, even if that patient otherwise fulfills the conditions defined on the *Define Schedule & Audience* screen (Define Schedule & Audience, page 9).





Adding parameters unrelated to the trigger selected in the *Define Schedule & Audience*  $\rightarrow$  *Define Trigger for Generating Mail* field (Define Schedule & Audience, page 9) will drop the patient from the campaign in cases where the parameter would always be empty. For example, the **appointment\_date** parameter is invalid when **Patient Birthday** is set as the trigger.

4. Select a signature in the **Select Signature 1** and/or **Select Signature 2** fields.



Signatures selected in these fields are *not* automatically added to the mail piece. Use the **Insert Parameter** field to insert the signature parameter(s) into the body of the letter.

5. Click **Continue** to proceed to the *Define Schedule & Audience* tab (Define Schedule & Audience, page 9).

#### **Define Schedule & Audience**

1. Under Choose the type of campaign you want to create, select **One-Off** or **Continual**.



Selections made in other fields may change this selection automatically.

2. Select one or more of the patient types under the Select Audience for field.



Patient type is set during patient intake, and can be seen and edited on the Patient Summary.



3. Select a trigger in the Define Trigger for Generating Mail  $\rightarrow$  Select Trigger field.

| Define Trigger for Generating | Mail:    |
|-------------------------------|----------|
| Select Trigger                |          |
| Select Trigger                | ~        |
| Select Trigger                | <b>A</b> |
| Appointment Date              |          |
| Intake Date                   |          |
| Hearing Aid Sale              |          |
| Hearing Aid Return            |          |
| Tested Not Sold               |          |
| Hearing Test Entered          |          |
| Patient Birthday              |          |
| Warranty Expiration           | -        |

4. Make a selection in the second field under Define Schedule & Audience.

| Define Trigger for Generating M | lail:  |                            |        |
|---------------------------------|--------|----------------------------|--------|
| Select Trigger                  |        | Past or Future Appointment |        |
| Appointment Date                | $\sim$ | Future Appointment         | $\sim$ |



The label and purpose of the second field varies depends on the selection in the *Select Trigger* field in Step 3. Not all triggers have a secondary field.

#### 5. Complete the Define When to Generate section.

| /hen to Ge  | nerate:     |                   |   |
|-------------|-------------|-------------------|---|
| Days/Months | /Years      |                   |   |
| Day         | $\sim$      | Before            | ~   |
|             | Days/Months | Days/Months/Years | Days/Months/Years     Day       Day    Before |



When you use the **Before** option (i.e. the letter should be sent out before the trigger), this defines when the patient should *receive* the letter. The letter will generate based on approximate delivery time.

When you use the **After** option (i.e. the letter should be sent out after the trigger), this defines when the letter should be *mailed*.



6. (Optional) Make a selection in the *Exclude These Patients*  $\rightarrow$  **Do Not Send If** field(s).

| Exclude These  | Patients:           |          |
|----------------|---------------------|----------|
| Do Not Send If | Made a Purchase     | ~        |
| Do Not Send If | None                | <b>•</b> |
| borrocochan    | Made a Purchase     | - 11     |
| Do Not Send If | Tested Not Sold     |          |
|                | Medical Referrals   |          |
|                | Future Appointments | - IF     |

The Exclude These Patients triggers are calculated exclusive of the inclusive triggers in the Select Audience for and Define Trigger for Generating Mail  $\rightarrow$  Select Trigger fields (i.e. the exclude trigger rules are applied to the results of the include triggers).

7. (Optional) If applicable, complete the secondary fields for the selection(s) made in the *Exclude* These Patients  $\rightarrow$  **Do Not Send If** field(s).

| Do Not Send If | Made a Purchase       | ~ | Any Purchase | ~ | In the Last | ~ | 6 | Month | ~ |
|----------------|-----------------------|---|--------------|---|-------------|---|---|-------|---|
| Do Not Send If | Returned Hearing Aids | ~ |              |   | In the Last | ~ | 3 | Month | ~ |
| Do Not Send If | None                  | ~ |              |   |             |   |   |       |   |



Dates in these fields are relative to the date selected in the *Define When to Generate* field.

- 8. (Optional) Complete the Describe the Mail Piece (optional)  $\rightarrow$  The Purpose of This Letter field.
- 9. (Optional) Complete the Describe the Mail Piece (optional)  $\rightarrow$  Mail Piece Description field.
- 10. Select Continue to proceed to the Preview & Confirmation tab (Preview & Confirmation, page 11).

#### **Preview & Confirmation**

The *Preview & Confirmation* tab is where you can review your letter's configuration, preview the letter's contents, and configure how the letter will be handled.



| Compose Letter                           | Define Schedule & Audience Preview & Confirmation  |
|--|--|
| Test Latter                              |  |
| Test Letter                              |  |
| Active Inactive                          | Preview  |
| Printing Type                            |  |
| Inhouse Free 🗸                           | Test Clinic Audiology<br>1345 Hyperion Avenue  |
| Clinic<br>Test Clinic Audiology          | Autumn Hill, NY 10027  |
|  | 6  |
| Current                                  |  |
| Schedule                                 | [Patient Name]<br>[Patient Address]  |
| Purpose                                  | [Patient City & State]<br>[Mail Date]  |
| Sed et interdum augue.                   | [patient_full_name]<br>[patient_street]<br>[patient_city_state_zip]  |
| Description                              | (Lease, Text) Text (Lease, Lease, Lease |
| Sed enim arcu, condimentum sed magna ac, |  |
| porttitor tempus mauris.                 |  |
|  | Dear [patient_title] [patient_last_name],  |
|  | Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec eget ligula eget nibh iaculis<br>imperdiet vel vel sapien. Suspendisse potenti. Sed et interdum augue. Proin vitae erat tortor. Sed<br>commodo urna ut justo tincidunt hendrerit. Donec orci massa, finibus ac ex ut, volutpat tristique<br>nisl. Donec non lacus nec est varius porttitor.   |
|  | Sed enim arcu, condimentum sed magna ac, porttitor tempus mauris. Quisque finibus nisl elit, ac egestas quam rhoncus a. Fusce scelerisque blandit tellus, a hendrerit mauris vehicula nec.   |
|  | Donec ipsum erat, accumsan a nibh eget, efficitur pharetra mi. Nunc at lobortis neque, sit amet venenatis mauris. Quisque tincidunt massa eget dolor pharetra accumsan. Donec nec porttitor lorem, eget pellentesque mi.   |
|  | Very truly yours,  |
|  | NewTest  |
|  | New Test   |

1. Review the contents and layout of the letter under *Preview*. To edit the letter, click **Edit Content** at the bottom of the letter preview to return to the *Compose Letter* tab (, page 7).



The preview is an approximations of the final output. The generated PDF may vary slightly from the preview.

#### 2. Select Active or Inactive.

Only **Active** letters are processed and display in the Mail Queue (Mail Queue, page 14). **Inactive** letters are *not* processed and do not appear in the Mail Queue, but are still shown in the Mail History (Mail History, page 15) if they have been sent in the past.



3. Select a **Printing Type**.



The only option available for this field is **Inhouse Free**. This signifies that you will be responsible for printing and mailing the letters, rather than an external mail-house.

- 4. Review the **Clinic**, **Current Schedule**, **Purpose**, and **Description** fields.
- 5. Click Save & Close to return to the Customer Care Mail page (Customer Care Mail, page 5).



# 4. Mail Queue

The Mail Queue section displays all active and pending letters from the campaigns. Whenever a trigger condition is met for a patient, a new letter will appear in the queue (e.g. patient birthdays). Pending letters are those awaiting approval.

|                 | Customer Ca   | are Mail 🛛 Mail 🤇 | Queue Mail   | History   |            |            |           |            |         |           |
|-----------------|---------------|-------------------|--------------|-----------|------------|------------|-----------|------------|---------|-----------|
| laueth.         | Mail Que      | eue Approv        | e Deactivate | Edit List | Preview 3+ | Selected   | ,         | -          | Show 10 | • entries |
| Campaign 🗸      | Approval Date | Mail Date         | Event Date   | Clinic    | In House   |            |           |            |         |           |
| Coverage Letter | Approved      | Tomorrow          | Mar 09 2018  | Helena    | а.         |            |           |            | •       |           |
| Test Continual  | Approved      | Feb 21 2018       | Feb 16 2018  | Helena    | 2          | EditLetter | Edit List | Deactivate | •       | Approve   |



The Mail Queue only displays campaigns with a mail date greater than today's date.

For individual letters in the Mail Queue, you can select one of the following options:

- Edit Letter Opens the letter for editing. For instructions on editing the letter, refer to Create New Mail Pieces, page 7.
- Edit List View and make manual adjustments to the generated mailing list for the letter based on audience and exclusions. You can edit individual patient details; preview and print the letters that will be generated for the patients; and edit, add, or remove a patient from the mailing list.
- Deactivate Deactivate this letter campaign. This will mark the letter as **Inactive**, meaning no more of these letters will be added to the Mail Queue until the letter is marked as **Active** again.
- Cancel Cancels and removes only this instance of the letter in the Mail Queue. The letter campaign itself is left **Active**, meaning future instances of this letter will continue to be added to the mail queue.
- Approve Approve a pending letter for distribution.



You can perform actions on multiple rows by clicking the  $\checkmark$  symbol on those rows to select them, then clicking one of the **Approve**, **Deactivate**, **Edit List**, and **Preview** buttons on the top of the page.



# 5. Mail History

The Mail History section shows a record of all letters from each campaign that have been mailed or otherwise passed the campaign date.

| Ma | ail History              | Reactivate  | Expo             | rt   | Preview | Maple       |               |         | ~                      |   |
|----|--------------------------|-------------|------------------|------|---------|-------------|---------------|---------|------------------------|---|
|    | Campaign                 | Mail Date   | Canceled<br>Date | Cost | Clinic  | In<br>House | Mail<br>House |         |                        | Θ |
|    | September Sales          | Sep 13 2018 | ÷                | \$0  | Maple   | 2           | -             | Preview | Export List Reactivate | 0 |
|    | Manufacturer<br>Warranty | Dec 04 2018 | -                | \$0  | Maple   | 1           | -             | •       | • •                    | 9 |



Mail History only displays campaigns with mail dates prior to today's date.

For individual letters in Mail History, you can select one of the following options:

- Preview Generate a PDF preview of the letter(s) in the campaign.
- Export List Generate and download a .XLS file containing the Patient Name, Patient ID, Patient Address, Patient City, Patient Street, Patient Zip Code, Mail Date, Event Date, Campaign, and Clinic.
- Reactivate This option only appears for **Inactive** campaigns. Clicking this option will mark the letter campaign as **Active**.



You can perform actions on multiple rows by clicking the  $\checkmark$  symbol on those rows to select them, then clicking one of the **Reactivate**, **Export**, and **Preview** buttons on the top of the page.



# Appendix A. Document Revision History

| Rev # | Date                | Description  |
|-------|---------------------|--|
| 1.0   | January 31,<br>2025 | <ul> <li>Document re-written to provide more detailed and granular information.</li> </ul> |
|       |                     | <ul> <li>Document updated to current branding guidelines.</li> </ul>                       |
|       |                     | <ul> <li>Removed references to the Sycle Mail House feature.</li> </ul>                    |
| 0.1   | March 12,<br>2020   | Initial document creation.   |