CRM User Guide

Sycle Private Practice

January 31, 2025
Revision 1.0

Disclaimer
The information provided by Sycle, LLC ("we," "us," or "our") in this document (the "Document") is subject to change without notice. We may make improvements and/or changes at any time to the product(s) and/or program(s) described in the Document. While all information in the Document is provided in good faith, we provide this information with no representation or warranty of any kind, express or implied.

The Document can not and does not contain medical/health advice. Any examples of medical/health information within the Document are provided with the intention of demonstrating the function of a product or service and are not intended to be seen as accurate or representative medical information.

The Document may contain links to materials or websites containing content belonging to or originating from third parties. We do not warrant, endorse, guarantee, or assume responsibility for the accuracy or reliability of any information or service offered by third-party material or websites linked within the Document.

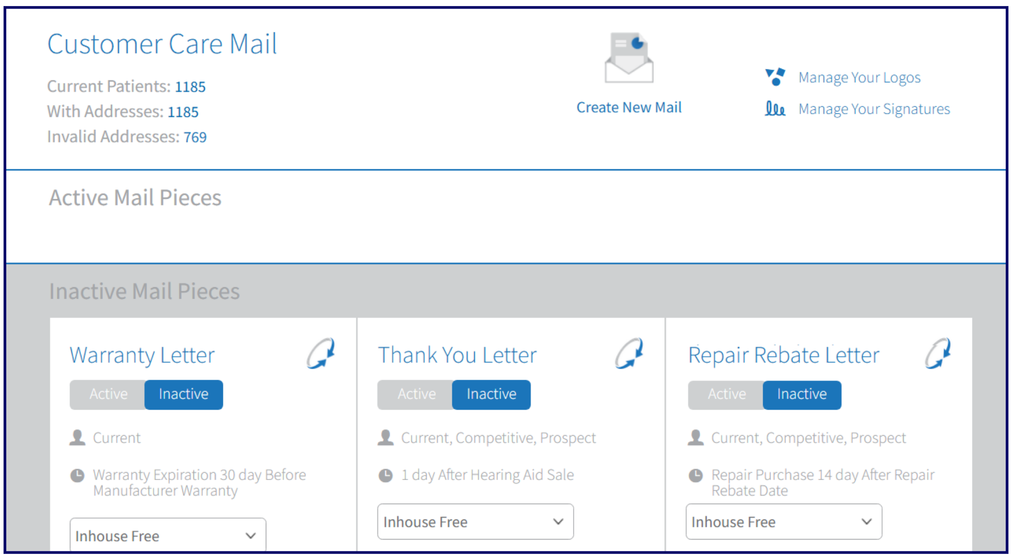
Table of Contents

1. Overview

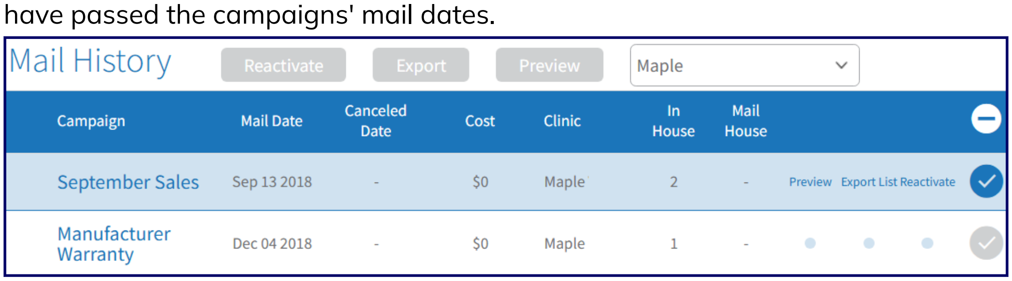
The CRM module is accessed via the **Marketing** tab.

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.



2. Configuration

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

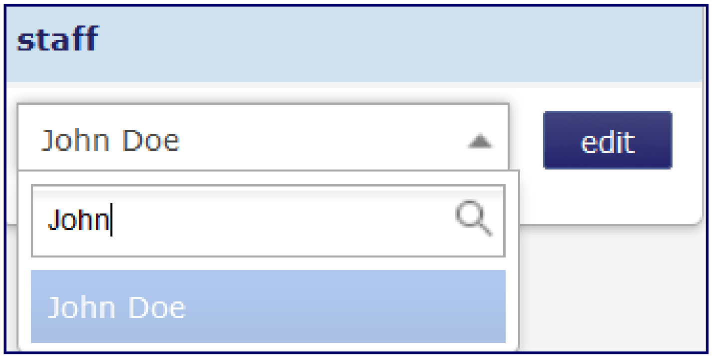
2.1. Assigning the Marketing Privilege

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

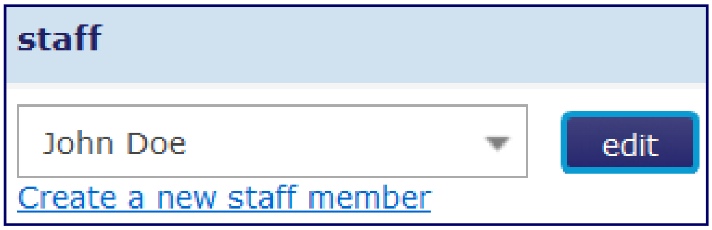
These instructions walk you through adding the **Marketing** privilege to a user. This privilege allows the staff member to be assigned a CRM Role (Assigning a CRM Role, page 4) and view Marketing reports.

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.

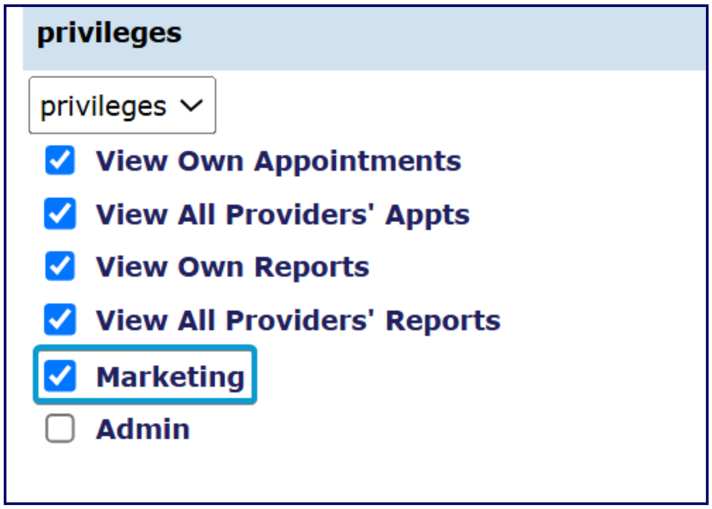


3. Click **Edit** to open the *Edit Staff* screen.



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.

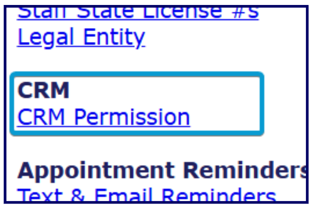
6. Click **save**.
7. Click **close** to return to the **Administration** screen.

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.

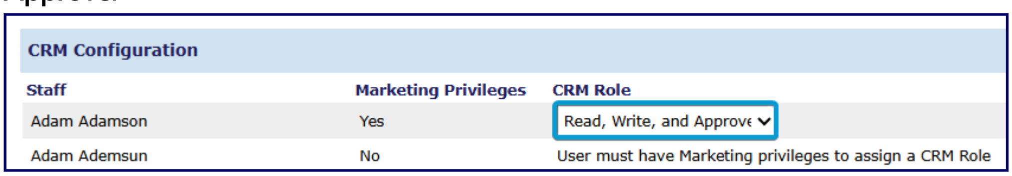
2. On the **Administration** screen, select *CRM* → *CRM Permission* to open the *CRM Configuration* screen.



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**.



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 → 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**.

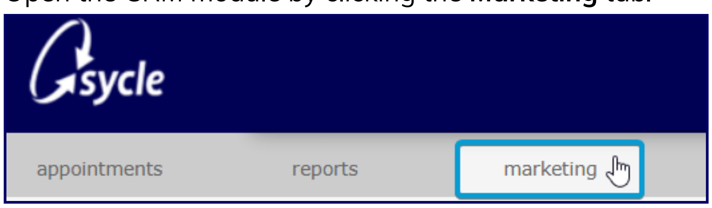
6. Click **Save & Close**.

Your logo will now appear under *Manage Your Logo & Signatures* → *Logo* → **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* → *Signature* → **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:

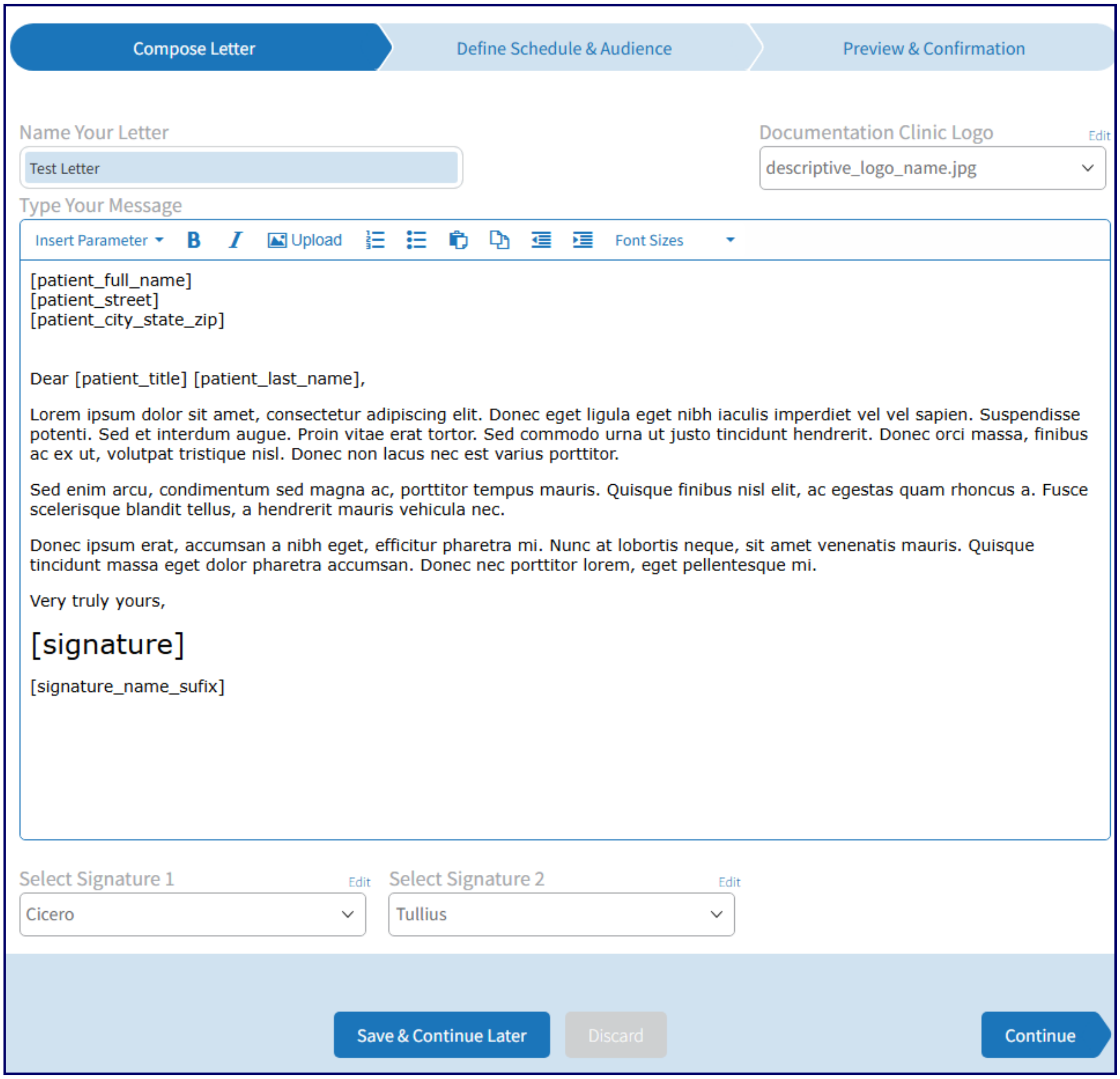
Compose Letter, page 7	Naming and adding logos to the letter; writing the body of the letter (with optional parameters to populate the letter with data from your clinic's database), and selecting signatures.
Define Schedule & Audience, page 9	Defining the mail piece's schedule and audience.
Preview & Confirmation, page 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* → *Compose Letter* → **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 → 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

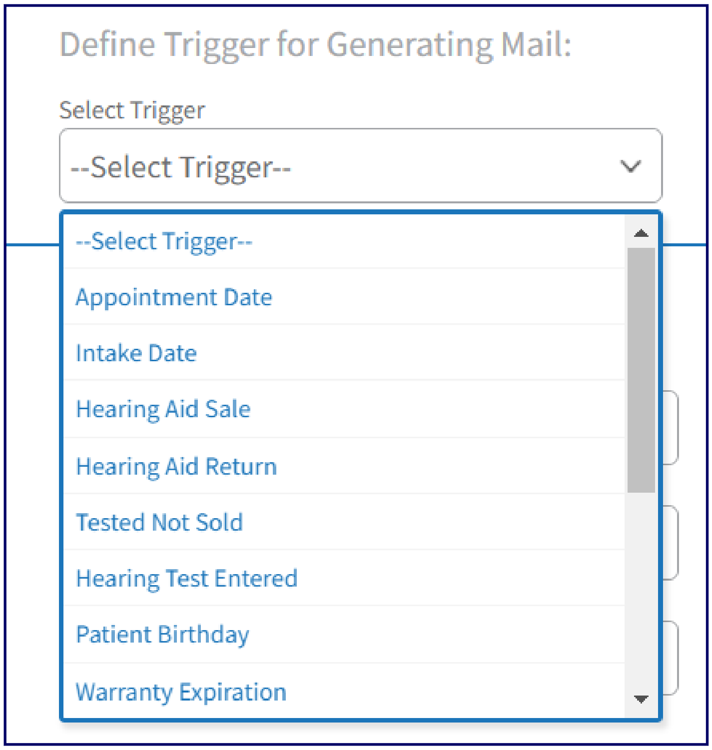
1. Under *Choose the type of campaign you want to create*, select **One-Off** or **Continual**.

   Selections made in other fields may change this selection automatically.

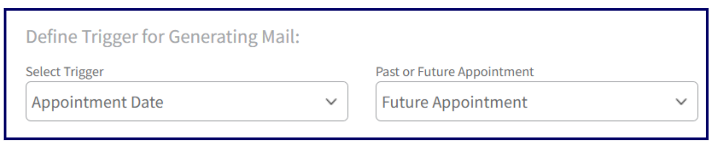
2. Select one or more of the patient types under the *Select Audience for* field.

   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* → *Select Trigger* field.

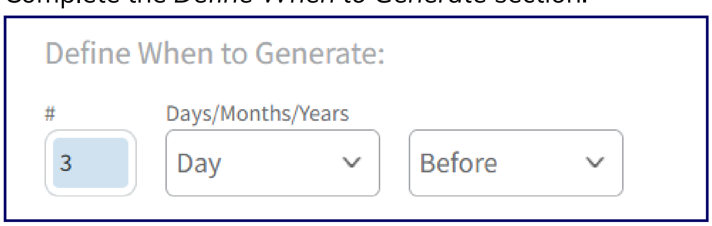


4. Make a selection in the second field under *Define Schedule & Audience*.



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.

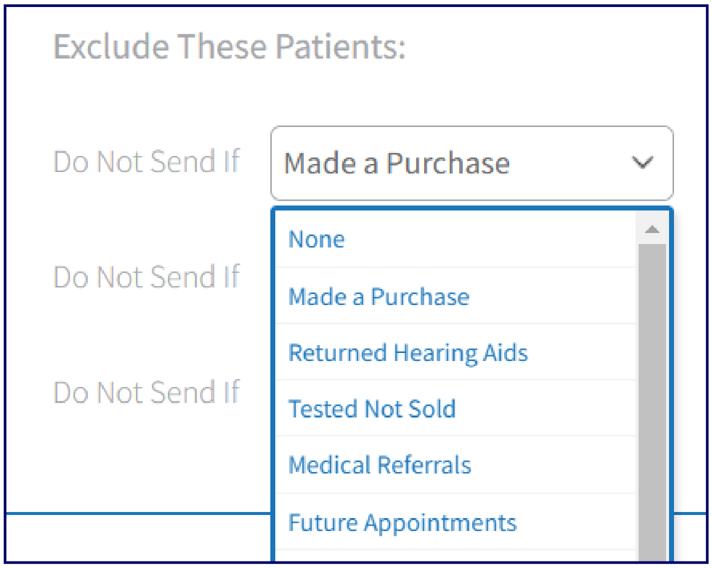
5. Complete the *Define When to Generate* section.



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.

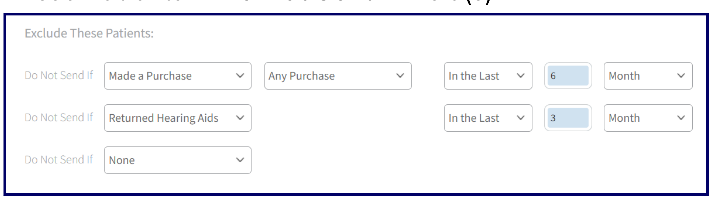
When you use the **After** option (i.e. the letter should be sent out after the trigger), this defines when the letter should be *mailed*.

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



> **!** The *Exclude These Patients* triggers are calculated exclusive of the inclusive triggers in the *Select Audience for* and *Define Trigger for Generating Mail* → *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* → **Do Not Send If** field(s).

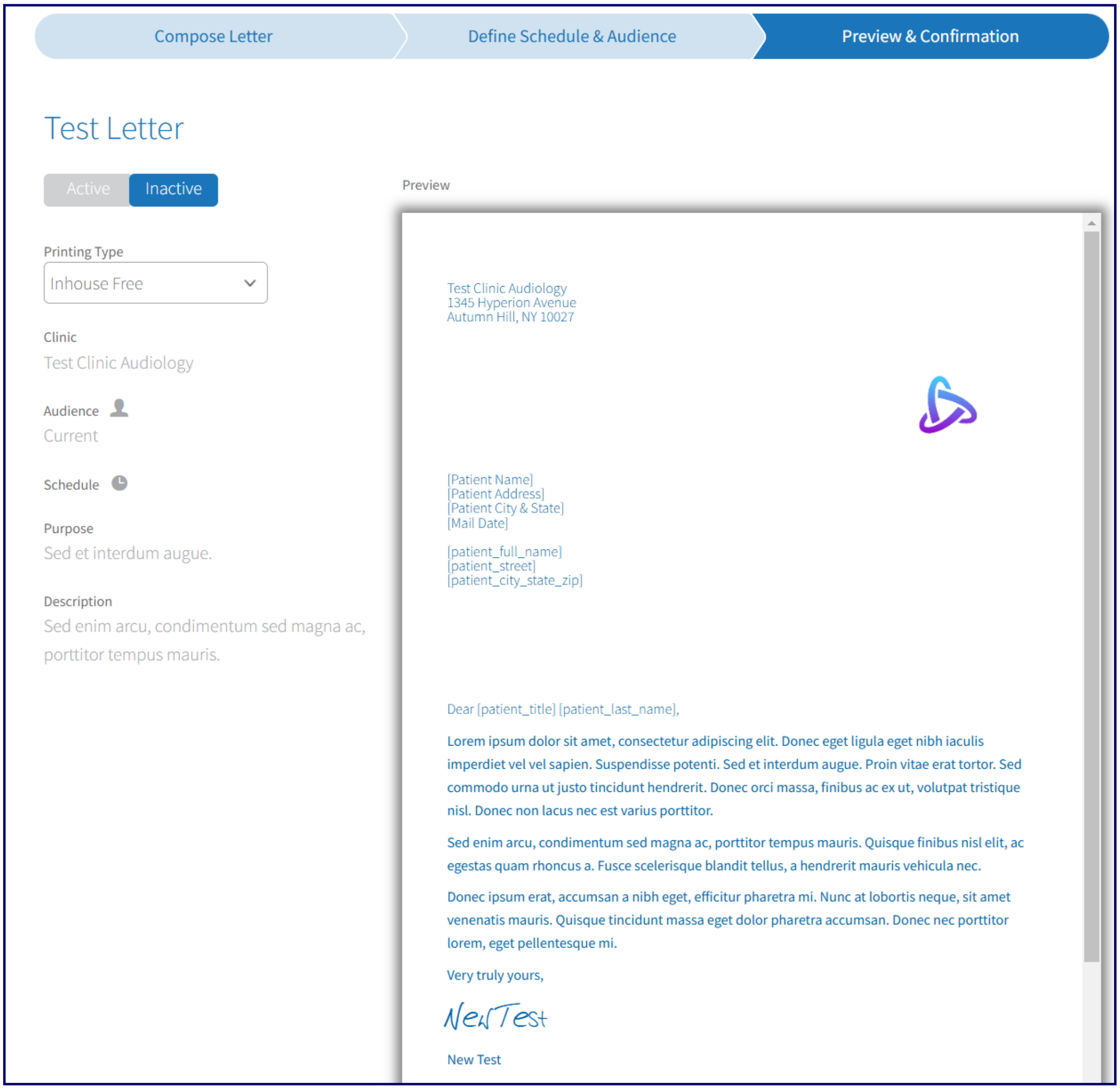


> **!** Dates in these fields are relative to the date selected in the *Define When to Generate* field.

8. (Optional) Complete the *Describe the Mail Piece (optional)* → **The Purpose of This Letter** field.
9. (Optional) Complete the *Describe the Mail Piece (optional)* → **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.



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.

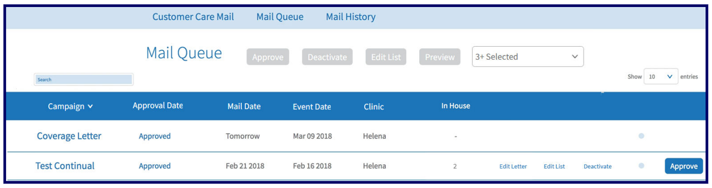
3. Select a **Printing Type**.

> 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.



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

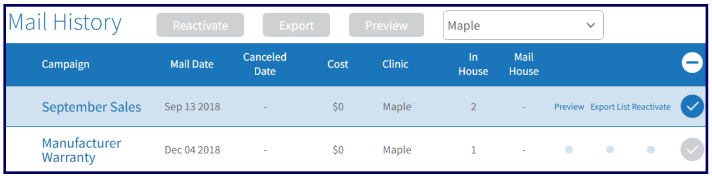
For individual letters in the Mail Queue, you can select one of the following options:

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 ✓ 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.



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 ✓ 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, 2025	• Document re-written to provide more detailed and granular information. • Document updated to current branding guidelines. • Removed references to the Sycle Mail House feature.
0.1	March 12, 2020	Initial document creation.