

## Dental Referrals Link Button

### Installation Notes

V1.0,

26<sup>th</sup> July 2018

### Introduction

The installation of the Dental Referrals link button consists of two main steps.

The first step is to run an installer which prompts the user to enter **Dental Referral authorisation token** (API Key), which is used by Dental Referrals to identify which practice is using the portal.

The second step is to switch on the link button in Exact. To do this you will require a licence key issued by SOE. The same key will be used for every Link Button installation (i.e. it's a generic licence key).

### Installation PART 1 : Run the Dental Referrals Link Button installer

1. Place a copy of the drlink-Install application (the attached zip/exe file) onto the PC you want to utilise the link button.

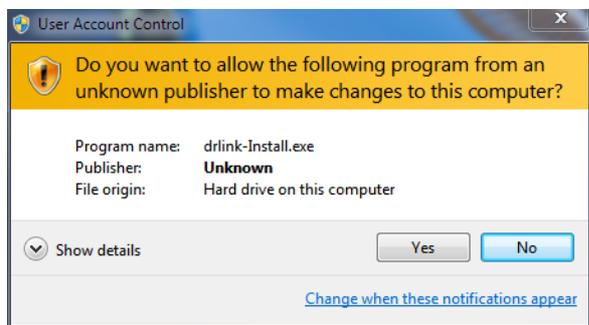
Make sure you have the Dental Referrals Authorisation Token (API Key) before continuing.

*Please note that this installation step will need to be repeated on every workstation you want the link button to be used.*

2. Run the installer

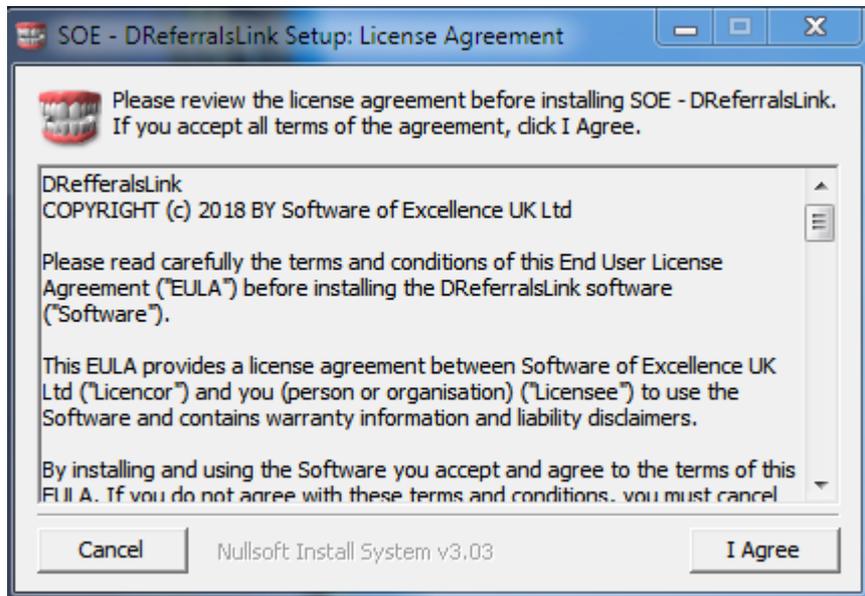
3. You will likely see the following UAC popup appear.

If it does, then please select yes.



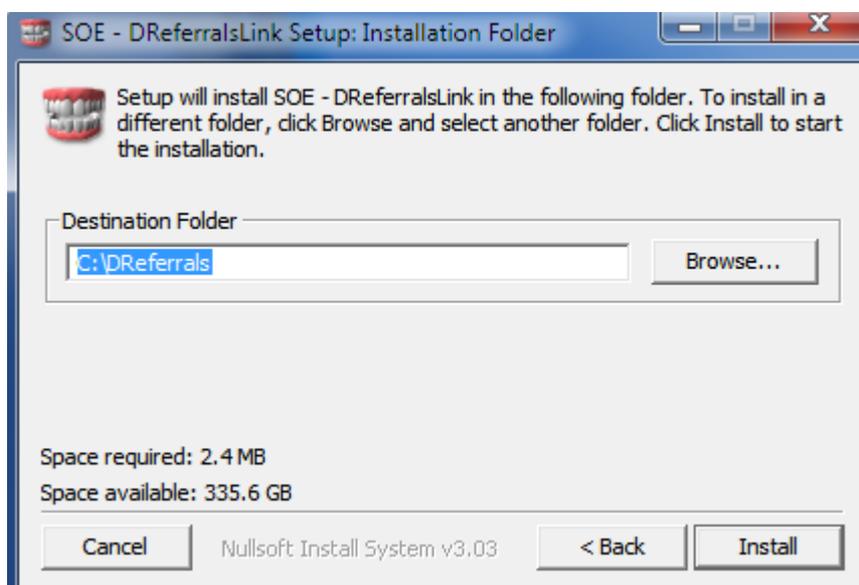
4. You now need to review and agree to the licensing terms.

When ready, please select I agree.



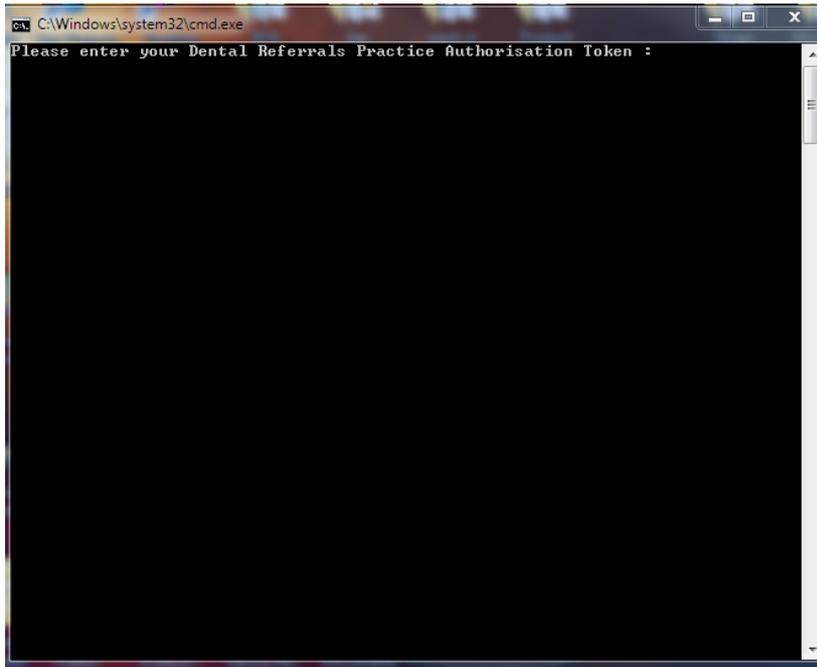
5. Specify installation folder.

For the purposes of the beta trial please stick to using the default installation folder shown below.



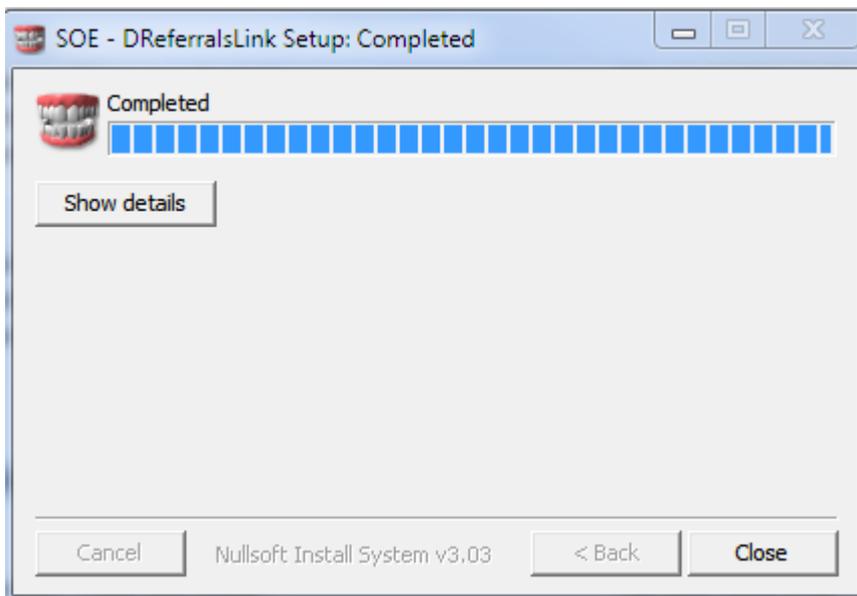
Select Install.

6. At the end of the install process a windows popup will be displayed prompting for your Dental Referrals Practice Authorisation token (API Key). This is the authorisation token issued by Dental Referrals to the practice. Enter your code after the prompt and hit return.



If the wrong code is entered or this code needs to be changed then this step can be repeated by running the CreateAuthToken script in the install directory.

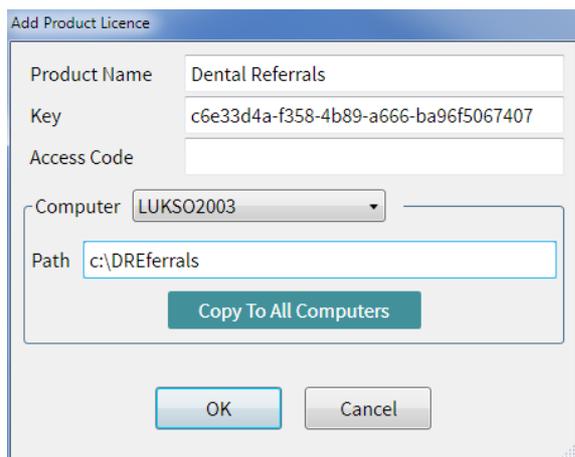
7. Complete the installation by selecting close



You can now move on to PART 2.

## Installation PART 2: Run the Dental Referrals Link Button installer

1. Ensure that the version of Exact that's installed supports Link Buttons. You will need to ensure that you have Exact V12.7 PF2 or newer installed (check the Exact Help>About option to display the software version).
2. Login to Exact with Admin privileges
3. Select Configure > Practice Settings > Product Licences
4. Select "+1" to add a new Licence.



5. Under Product Name enter a title that is initially meaningful to you.

We Suggest "Dental Referrals"

Please note that once the licence has been authenticated this name will update to reflect the actual name registered against the licence key.

6. Under the key enter the following SOE link button licence key

c6e33d4a-f358-4b89-a666-ba96f5067407

***This is a free licence so the same key can be used to enable this link button on any number of workstations.***

7. Please leave the access code blank ( it is not required for this Link Button ) .

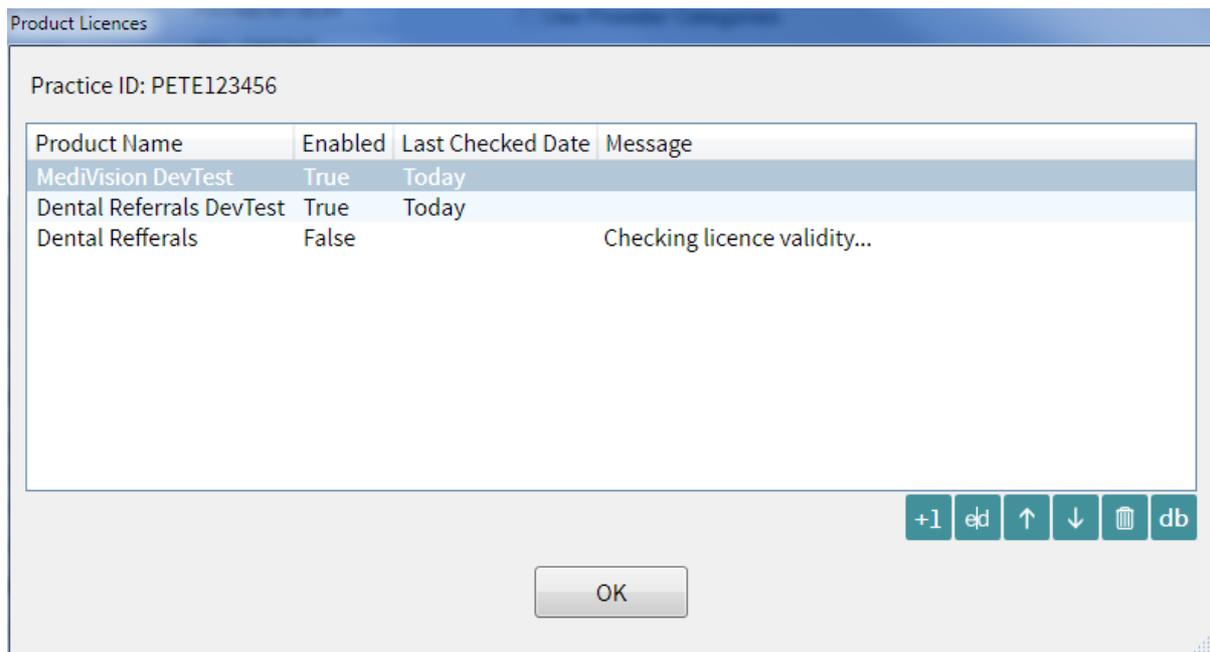
8. Enter the directory path where you have installed the scripts in Part one.

At the current time you should be using C:\DReferrals.

This will need to be entered on every workstation using the link button. You can use the "Computer" drop down to choose the workstation and enter the path.. If you wish for the link to be activated on all machines then you can use the "Copy to All Machines" option.

9. Check that all details have been entered correctly and then press OK.

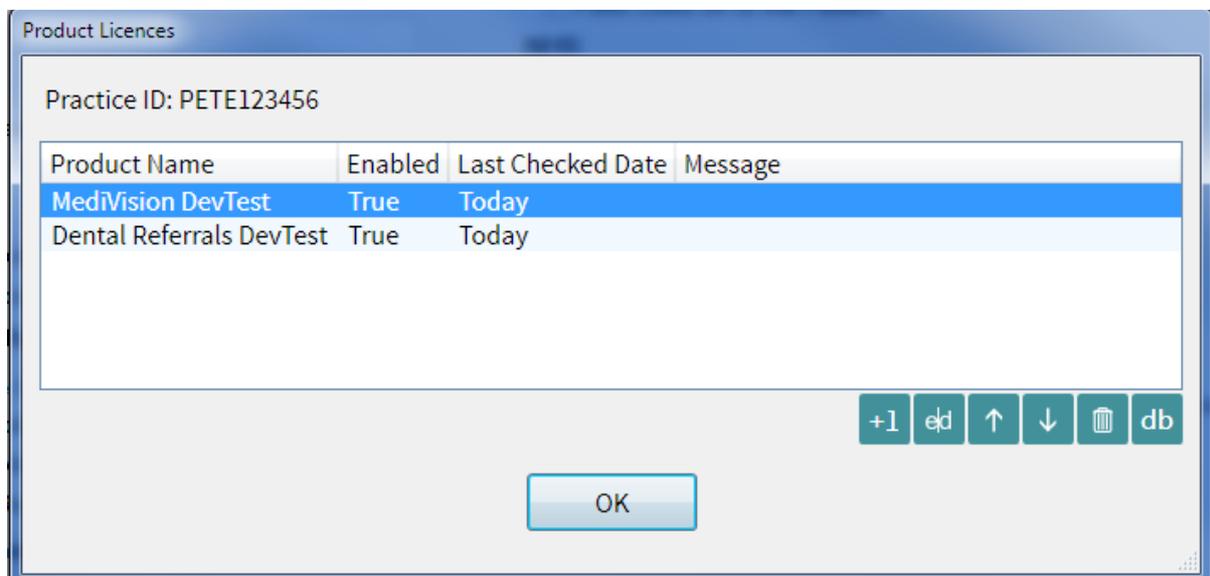
The licence will now be checked and validated and you should see an entry similar to below.



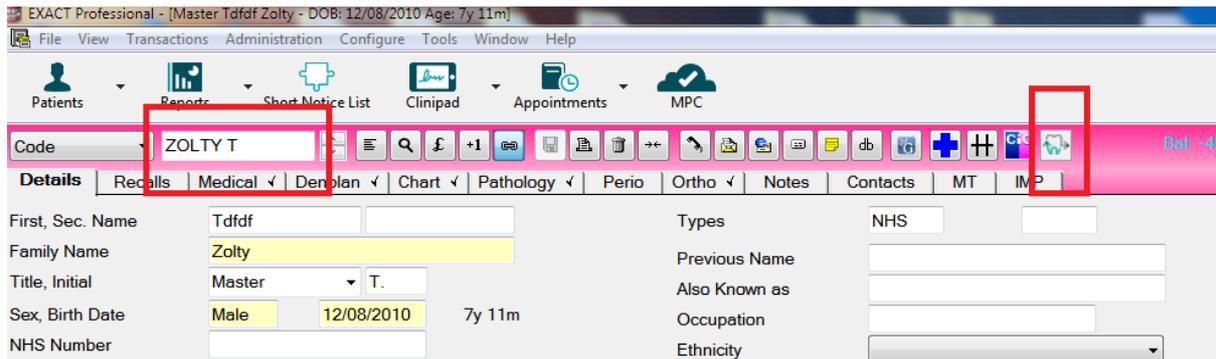
Please note this screen does not auto update so please exit this screen by pressing OK.

Checking the licence validity can sometimes take a couple of minutes to process so please wait a minute or two and then re-enter the product licences screen. Once confirmed the licence should change to enabled = True.

You should now see a screen similar to below.



Once the licence is enabled then close and relaunch Exact workstation. When you select a patient from the patient toolbar the extra Dental Referrals Icon will appear. ***Please note the icon will not appear until you select a specific patient.***



When you select this icon the Windows default web browser will be launched, pointed at the Dental Referrals web portal front screen which then prompts the user to select a type of referral form.

Once the referral form is selected, the form will be displayed with the supported patient fields prepopulated.

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