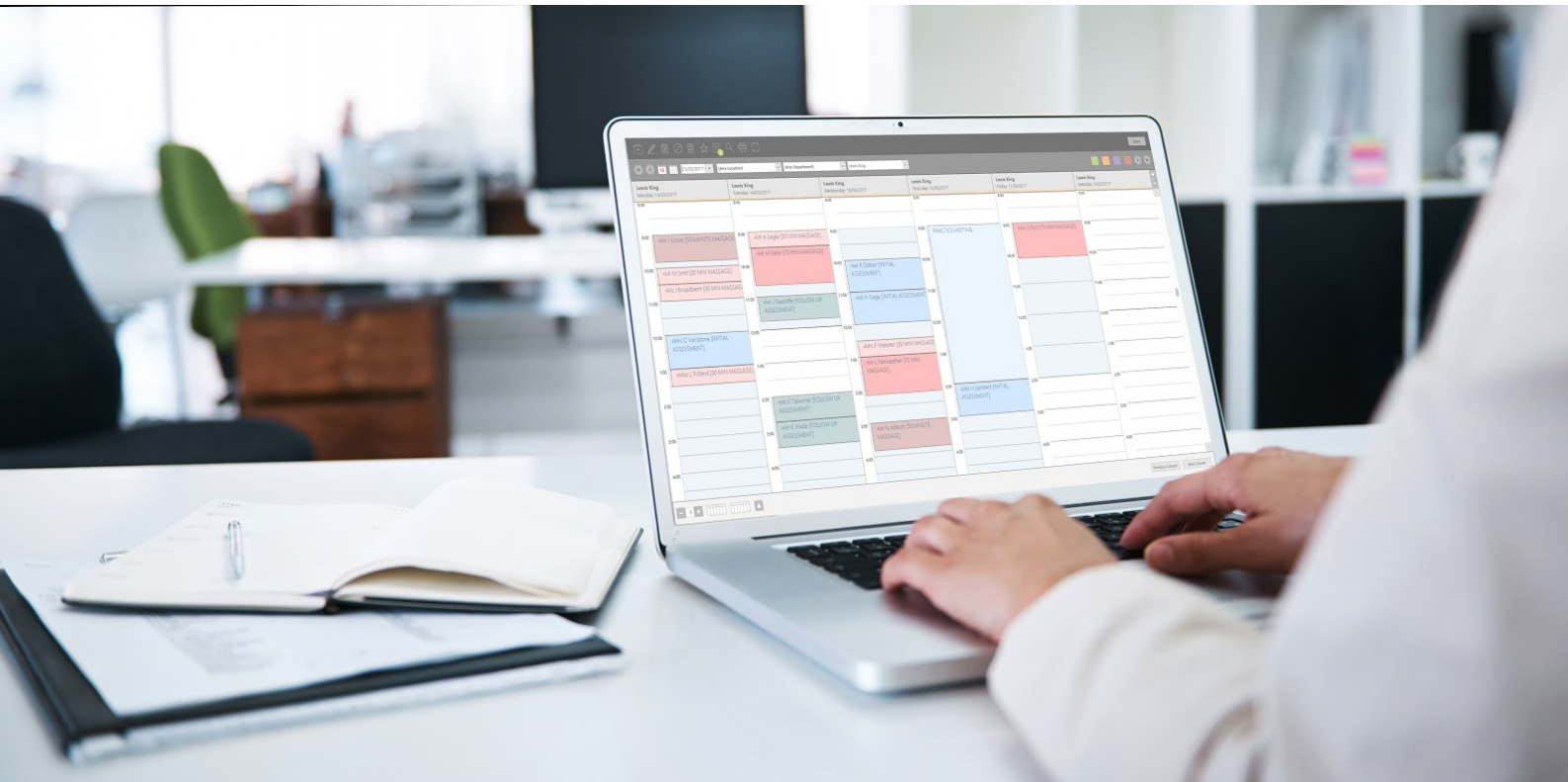# Welcome to PPS

Thanks for choosing PPS as the solution for your practice! In order to get you off to the best start, we've put together a small starter pack which will help you get to grips with the basics and ensure that you make the most of your subscription!

Setting Up

If you took advantage of our free 30-day trial, then you might already be familiar with some of the setup options. We want you to have the confidence of a PPS pro, so here are our top tips for making sure PPS is setup exactly how you want it!

Getting logged in

Hopefully, you already have this step mastered! Should you need a refresher, here's a guide on how to set up access to your PPS Hosted service on your PC if you're working on a Mac you'll need to follow this guide instead. As PPS Hosted is online, you can access your data on any device with an internet connection! So if you're always on the go, here's how to access PPS from your phone or tablet if you use Apple products, or if you're an Android user.

Top Tip: Your PPS Hosted username contains your PPS registration number. It's a 6 digit number that starts with 55. This number allows us to identify your account when speaking with our support or sales teams.

Adding users

When you first log in to PPS you will be the only user and therefore, by default, will become the system administrator. You can set up other members of your team as system users by following this guide.

Top Tip: It's important that everyone that will be accessing PPS has their own username and password, this allows you to properly manage the access rights of different users and allows PPS to correctly store a record of the actions undertaken by each PPS user in the database audit.

Your schedule

Before you can start booking your appointments you'll need to set up your availability. PPS has a flexible appointments diary that can be customised to suit your exact schedule including varying working days, hours, and slot durations. If you have several members of staff you can set up each diary to suit each individual's availability, here's how to get started.

If you work in different locations or have different departments and treatment rooms, make sure you set them up in PPS too, making sure you never get in a muddle again!

Top Tip: Your PPS diary is not just for scheduling your treatments! If you have regular breaks, practice meetings or any other reason that you are unable to book an appointment at a certain time, you can use the 'block time' feature to mark those slots as unavailable, saving you from double bookings and keeping all of your activities in one place!

Treatments and charges

Once you have your diary set up, the next step is adding your treatments so that you can start taking bookings! You can add a description of your treatments, the typical duration and even choose which practitioners and locations can provide each treatment, adding those details lets PPS know exactly how much time to book out in your diary and who this treatment can be booked with and where! Here's how to add your treatments!

Top Tip: Each appointment type can be assigned a colour to make it easy to identify different types of treatments in the diary at a glance! Just select 'Highlight Colour' at the bottom of the appointment type window to select your own colours.

Whenever you complete an appointment in your PPS diary, you will be prompted to bill the client for their treatment. In order for PPS to tell you what you should be billing, you can associate your typical charges to each of your treatments so all you have to do is choose how to bill or record the payment! Here's how to set up your charges.

Top Tip: If you have a number of practitioners or locations that offer the same treatments but have different prices, you can use price profiles to allow PPS to check the details and automatically adjust the cost accordingly! Here's how to set up price profiles.

Booking confirmations and reminders

PPS can send out appointment booking confirmations and reminders to your patients to make sure they never miss a booking! You can choose how you want your clients to receive these, either via email or SMS, or a combination of the two! You also have total control of the content of your booking confirmations and reminders so you can make sure that they contain all the info that they need prior to their treatment! Here's how to get set up.

Top Tip: Each SMS can hold up to 160 characters, make sure you stick to this limit to avoid using more than one SMS credit per confirmation or reminder! SMS credits can be purchased directly from our sales team and cost around 6p per message. Our bundles of SMS credits start from £30 for 500 credits.

Extras

Billing clients

Whenever you invoice a client or receive a payment, PPS generates either an invoice or a receipt that you can print or email to your clients. Make sure that your clients know where these invoices and receipts are coming from by adding your practice details to the invoice header! Here's the guide on how to get set up!

Top Tip: If you have a company logo you can customise your invoices and receipts to include this, too! Just make sure you have a .JPEG or .PNG copy of your logo and follow this guide to add it!

Insurance companies, GPs and other third-party details

When you register your clients you might ask for details of their GP, insurance company or any other third parties that might be relevant to you or the client during treatment. In the client details screen you'll find a section dedicated to storing the details of any third parties, but before you can associate them to your client, you'll need to add the third party to PPS! Here's how to add your third-party details!

Top Tip: Once you have added third-party details you can associate that third party with as many clients as you like, so if some of your clients share the same GP or are covered by the same insurance company, you only need to add the third-party details once. When you come to associate the third party with your next client you can simply search for the details and select!

Treatment notes

Recording treatment notes is nice and easy in PPS! For each appointment, you can start a new consultation where you can record notes in the free-text window. After a number of consultations, your client's history will begin to build up and you will also be able to review previous notes as you record new ones. To make sure you stay focused on treating your client rather than typing things up on your screen, be sure to take advantage of time-saving tools including customisable text sets , body charts and custom forms!

Top Tip: If you have documents relating to your client's treatment stored outside PPS, you can attach the documents to the client's log so that you can view them as part of the treatment history, keeping everything in one place making it easier for you to review all of the relevant info! Here's how!

Making the most of PPS

Managing Clients

PPS creates a client details screen and client log for each client that you register. These two screens will be your go-to areas when it comes to searching for things such as contact preferences and looking back on the history of the client's interaction with your practice.

The client log pretty much takes care of itself, keeping a record of all appointments, consultations, bills and activities. Using the filters on the left-hand side of the window you can choose to look at a particular type of record, making it easy to find historical data!

The client details screen is where you will store all of the information that you capture when you register new clients. Use the client profile section to add your own custom fields should you need to record any extra information.

Top Tip: PPS has the ability to automatically send and schedule emails, SMS and more! In order to take full advantage of this, don't forget to ask each client how they prefer to be contacted and record the outcome in the contact preferences section at the bottom of the client details screen, once you have done this, PPS will do the rest!

KPIs and clinic statistics

The reports wizard in PPS allows you to pull out any data that you have put into the system, this gives you a great insight into key performance indicators and the customisable report criteria and breakdowns allow you to report on what's important to your clinic. Within the reports wizard you'll find some existing reports that you can use to get instant results or if they're not quite what you're looking for you can tweak them to fit your needs!

Top Tip: Once you have built the report you've been looking for, we recommend saving your reports to your 'favourites' list. This means when you need the results again you don't have to recreate the report, you can just click to run your saved favourite!

Emails, SMS, letters and more!

Client communication is a key aspect of any successful practice, so making sure that all of your emails, SMS and letters are efficient and effective is integral!

As most of the communications you send out will probably be very similar (think booking confirmations and appointment reminders). PPS enables you to set up default templates so

you don't have to create your message content each time! You can even add 'merge fields' to your templates to pull through unique client data like the time and date of their next appointment.

Already have your own templates setup? Don't worry, they don't have to go to waste! If your existing templates are in a Word document or something similar, you can just add it to PPS! You can still use merge fields like you would in any of your other PPS templates, too. Here's how to set up your standard templates.

Top Tip: Each template that you create in PPS can be automatically followed up by another template. This is great if you want to get a little more info to your clients, but don't want to overwhelm them with too much in the first email, or it's the perfect solution for forgetful clients that need a little more prompting than others to rebook appointments! Using this feature you can create a daisy chain of templates that can be sent out to your clients at your chosen intervals without having to remember to do anything manually!

Don't forget!

We know that getting started with a new software can seem like a daunting task, especially when you're starting with a blank canvas!

Hopefully this guide will have helped you to cover the basics, when you're ready to sink your teeth into some more, check out our PPS Support website, the home of all of our help guides and videos! You can either use the search bar at the top to find what you are looking for, or click PPS on the homepage and explore the different categories! Bookmark www.ppssupport.com in your browser as it's sure to become your new best friend!

Help & Feedback

Whenever you are logged in to PPS you have direct access to our help and feedback by clicking the link at the bottom of your taskbar on the left of your screen. If you need some help or advice from our support team you can check the knowledge base or raise a ticket with them. If you just want to let us know what you think, click feedback!   The feedback we receive influences the development of our products and features, so if there is something you think we could improve on or something new that you think you would benefit from, please let us know!