

# Insight Customer Portal (Medtech Evolution)



**Insight**, Medtech's customer portal, is a new channel of communication and knowledge sharing, specifically developed for Medtech customers. To make Insight as accessible as possible, direct, single-sign-on access to Insight from within Medtech Evolution has been made available.

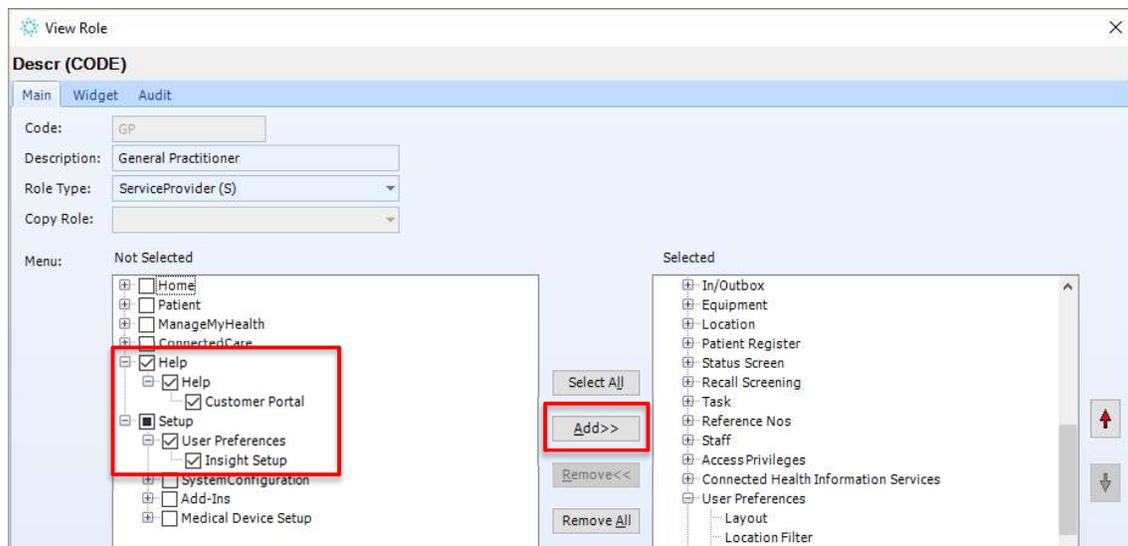
**Note:** we recommend that the Practice Manager register for a practice, in the first instance, so that they can become familiar with Insight and its capabilities, prior to other users accessing it.

## Set up Roles to Access Insight Portal

### File ► Options ► Access Privileges ► Role

To allow users to access Insight Portal, you firstly need to give their 'Role' access privileges, by selecting the following options and adding them to the role:

- Help ► Help ► Customer Portal
- Setup ► User Preference ► Insight Setup



**Note:** you'll need to do this for each role in the practice.

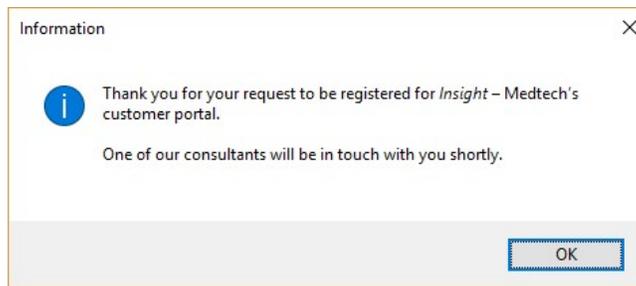
## Register for Insight, directly from within Medtech Evolution

### File ► Options ► User Preferences ► Insight Setup ► Register section

In order to access the resources made available within the Insight customer portal, you can register for Insight, by selecting the 'Register' button.



Clicking on the 'Register' button will prompt with the following message:

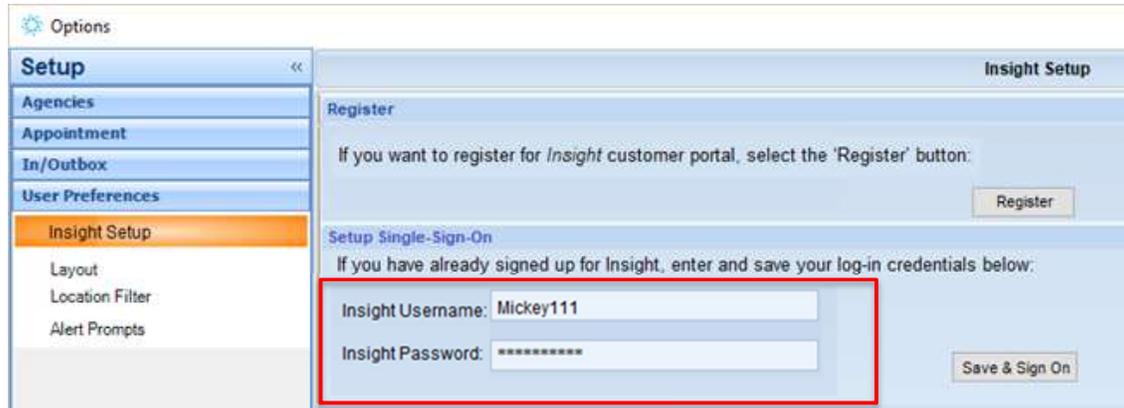


A Medtech Customer Support agent will contact you to complete the registration process.

## Setting up access to Insight, directly from within Medtech Evolution

Once you have completed your registration process for Insight and have your login credentials, enter these in the 'Setup Single-Sign-On' section. Then, select the 'Save & Sign On' button to save your credentials and launch **Insight** using your default web browser.

**File ► Options ► User Preference ► Insight Setup ► Setup Single-Sign-On section**



## Accessing Insight, directly from within Medtech Evolution

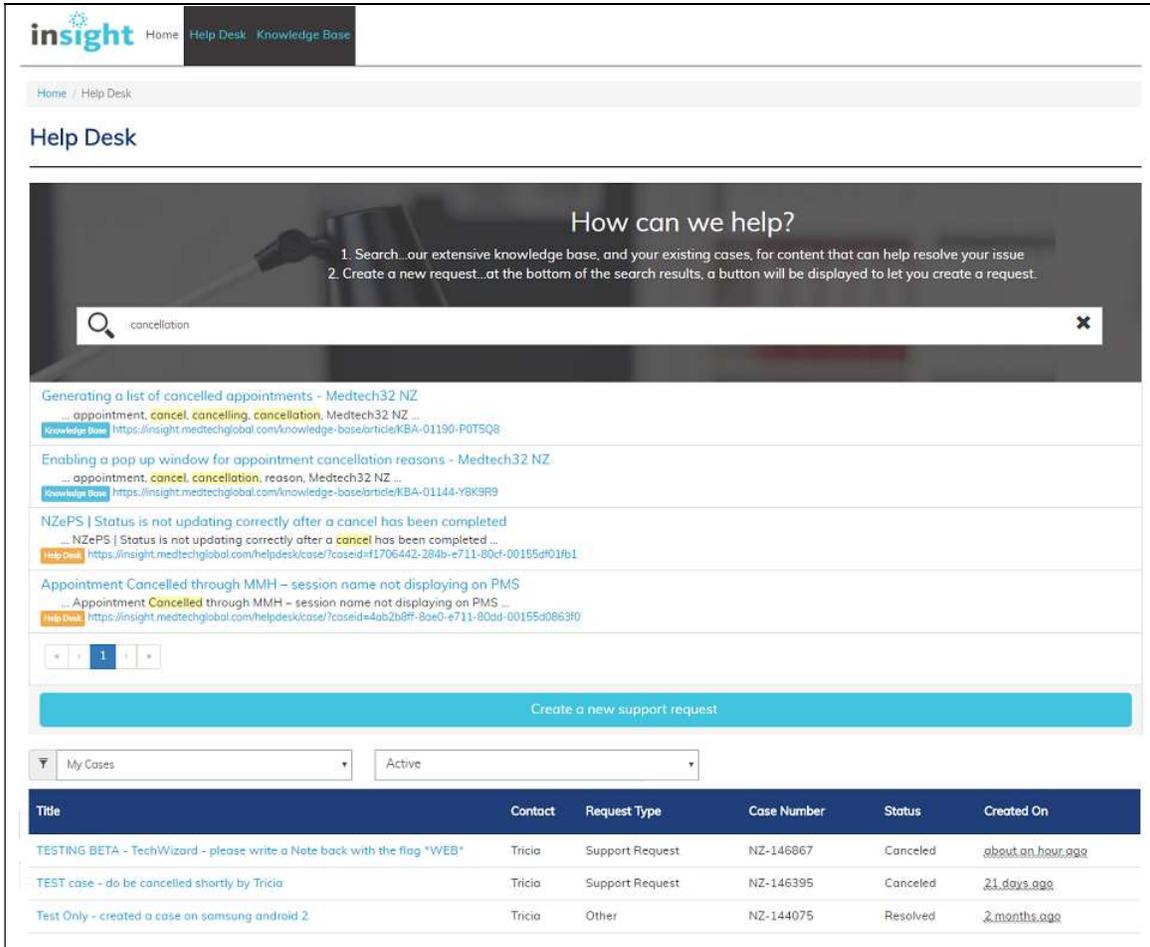
**Help ► Insight - Customer Portal**

Once you have saved your login credentials, you can directly access the Insight customer portal from the Help menu, without having to re-enter your login credentials.

If you have not yet completed registered for Insight, and entered your user name and password into the Single Sign On setup, clicking on the **Help ► Insight – Customer Portal** option will open the 'Insight Setup' screen.



**Important Note:** An 'Insight – Customer Portal' button  is also available for you to add to your Quick Access Toolbar.



The screenshot shows the Medtech Insight Help Desk interface. At the top, there are navigation links for 'Home', 'Help Desk', and 'Knowledge Base'. Below this, a search bar contains the text 'cancellation'. The main content area displays a list of search results, including articles about appointment cancellations and status updates. A 'Create a new support request' button is visible below the search results. At the bottom, there is a table of 'My Cases' with columns for Title, Contact, Request Type, Case Number, Status, and Created On.

Title	Contact	Request Type	Case Number	Status	Created On
TESTING BETA - TechWizard - please write a Note back with the flag *WEB*	Tricia	Support Request	NZ-146867	Canceled	about an hour ago
TEST case - do be cancelled shortly by Tricia	Tricia	Support Request	NZ-146395	Canceled	21 days ago
Test Only - created a case on samsung android 2	Tricia	Other	NZ-144075	Resolved	2 months ago

For further information on these new features, or any other queries regarding the changes in this release, please contact Medtech Support via:

- Medtech Evolution application [**Help ► Contact Support**]
- Online Chat: [www.medtechglobal.com](http://www.medtechglobal.com)
- Email: [support@medtechglobal.com](mailto:support@medtechglobal.com)
- Phone: **0800 2 MEDTECH (633 832)**