warp.

WARP Technologies Limited

Easyslot CRM Data Transfer Bookmarklet

Reference Guide

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Document Information

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1 Initial Setup

1.1 Step 1

Click the Funnel Icon on the Navigation Bar:



1.2 Step 2

Ensure 'Look for' is set to 'Work Orders' and 'Use Saved View' is set to 'All Active Cases':



nt Work Order Does Not Contain Data

1.3 Step 3

On the right panel, click 'Add Columns':

>

🛂 Custom Controls	
Configure Sorting	
F Add Columns	
Change Add additio	nal col
🙀 Remove	

1.4 Step 4

Add the following columns to the Advanced View:

Field	Related Entity		
Our Reference	Case		
Medical Records Required	Case		
MedCo Reference Number	Case		
Customer Reference Number	Case		
First Name	Client		
Last Name	Client		
Birthday	Client		
Salutation	Client		
Email Address	Client		
Daytime Telephone	Client		
Mobile	Client		
Evening Telephone	Client		
Address 1 Street 1	Client		
Address 1 ZIP/Postal Code	Client		
Incident Date	Parent Event		
Event Type	Referral		
Account	Referral		

1.5 Step 5



1.6 Step 6

Name the Advanced View 'Easyslot' then click 'Save.

Save as new View The view is stored in the list of saved views.	×
Name * Easyslot	
Save	el

1.7 Step 7

If you're unable to find 'Medco Reference Number' field, ensure the 'Add Column' search type is changed from 'Default' to 'All':

Original Search Type	Fixed Search Type		
Add columns $\qquad \qquad \qquad$	Add columns $\qquad imes$		
Work Order Related	Work Order Related		
$ ho$ Search Default \sim	🔎 Search 🛛 All 🗸		
田 Created By	🗔 (Redundant) Auto Report QA		
⊞ Created By (Delegate)	চ্চা (Redundant) Defendant's Clinician		
户 Croated On	Med (Rodundant) Defendant's Hospital Trust		

2 Installation

2.1 Step 1

Navigate to <u>https://warp.co.uk/easyslot.html</u> in the browser the bookmarklet will be installed on.

2.2 Step 2

Drag the orange 'CRM DATAGRAB' button to your bookmarks bar:



3 Usage

3.1 Step 1

Navigate to CFM Cases and select the 'Easyslot' View:



3.2 Step 2

Select the relevant case by clicking on the row until it's highlighted:

Reference \uparrow \checkmark	Event Type (Referral) 🗸	First Nar
0001281/102	Road Traffic Accident	licker.
0001281/104	Road Traffic Accident	itokan
0001281/105	Road Traffic Accident	Broken

3.3 Step 3

Click on the bookmarklet to copy the case data to the clipboard:



3.4 Step 4

Navigate to the Easyslot 'Book Appointment Slot' page:

Book Appointment Slot Enter all required information to BOOK the appointment.					Selected slot will be		
Selected Appointmer	Selected Appointment Slot Details						
		Anna Anna Anna Anna Anna Anna Anna Anna	el Texasterio Carlo Reference e	Not served a descent	Rates (Second	Louis and	-
Client Personal Detai	il		4	Accident Detail			
Title*	Forname*	Surname*	P	Accident Date		Accident Type	
Mr	~			dd/mm/yyyy		please select	¥
Gender*	· · · · · · · · · · · · · · · · · · ·	dd/mm/yyyy	4	Agency/Soicitor Detail			
Client Contract Datail			4	Agency*		Agency Ref*	
Client Contact Detail				Medical Specialist Reporting Group			
Home Tel	Work Tel	Mobile	S	Solicitor Add New		Solicitor Ref	
Email				piease select	•		
				Medco Detail			
Address Detail			h	MedCo ID			
Postcode*							
		Search Address	F	Records Required?			
Building No	E	Building Name	0	Check this box if medical records are required for this case.			
Address Line 1			1	Instruction Letter (Max 10MB)			
Address Line 2			Choose file No file chosen				
Terrent Miller		Appointment Notifications?					
Townycity			C	Send Email to Solicitor? Send Email to Client? Other than above selection, System will send appointment notifications to Expert and Instructing party.			tructing party.

3.5 Step 5

Click on the bookmarklet again to paste the case data into Easyslot:

Easy	slot CRM Trans	
	Contact	FAQs
	🗆 Dashboard	
	Account Settings	
	🗆 Search Slots	Selected Appointment C

[End of Document]