

## **About Practice Perfect**

Practice Perfect is a 'client/server' application. In other words, there are two parts to the software that make it usable: The 'server' software, which runs in the background on one computer, handles all of the data storage and retrieval. It is transparent to the average user – you'll never be aware its even running. The 'client' application is the front-end part of the program, its what you see when you are using the program, the screens, menus, reports, invoices, etc.

Every Practice Perfect installation has ONE 'server' running somewhere and one or more 'clients'. If you are running Practice Perfect on a standalone computer, then internally there is both a 'server' and a 'client', although to the user, this is transparent, all you will see is the 'client' software.

For you techies, Practice Perfect uses TCP/IP protocol to communicate between the client and server, across an office or across the Internet.

## Installating Practice Perfect

To install Practice Perfect on either a server, a workstation or a standalone computer, visit the weblink outlined in your letter of introduction. If you don't have the weblink, please contact our support department at **(877) 510-7473** or email us at <u>support@practiceperfectemr.com</u>. The setup program will run, as follows:



To begin the installation procedure, click on <u>Next</u>. Otherwise, to end the process, click on Cancel. Assuming that you proceed, the following panel will appear:

| S Practice Perfect Setup Wizard  | x |  |  |  |
|--|---|--|--|--|
| License Agreement Please read the following important information before continuing.   | X |  |  |  |
| Please read the following License Agreement. You must accept the terms of this agreement<br>before continuing with the installation.   |   |  |  |  |
| Please review the following license agreement before installing or using the . Practice<br>Perfect EMR & Management Software, any individual Practice Perfect component or<br>other Practice Perfect EMR & Management Software, software product or part thereof,<br>and/or all related materials. If you agree to the terms herein then you must select the<br>"I accept" option during the software installation process as confirmation before you<br>are permitted to use this software and related documents. |   |  |  |  |
| DEFINITIONS:   |   |  |  |  |
| This Practice Perfect EMR & Management Software End-User Software License<br>Agreement ("EULA") is a legal agreement between you (either as an individual user,<br>corporation or single entity) and Practice Perfect EMR & Management Software<br>("Practice Perfect") for the Practice Perfect EMR & Management Software, and/or   |   |  |  |  |
|  |   |  |  | <pre>✓ practice perfect &lt; Back Next &gt; Cancel</pre> |

Again, to continue, click on "*I accept the agreement..."* and click <u>Next</u> to continue or Cancel to end the process. The following panel will appear:

| Practice Perfect Setup Wizard   |   |  |  |  |
|---|---|--|--|--|
| Select Country Select the country Practice Perfect EMR & Management Software running on |   |  |  |  |
| Select country from the following list:   | Description<br>Selecting the correct country will enable<br>the proper address labels and invoice<br>styles to be installed |  |  |  |
|   |   |  |  |  |

Select which country Practice Perfect is being installed for, *Canada*, the *United States* or *both*, and click on <u>Next</u>. The following panel will then appear:

| Practice Perfect Setup Wizard   |  |  |  |  |  |
|---|--|--|--|--|--|
| Select the setup type to install  |  |  |  |  |  |
| Click the type of setup you prefer, then click Next.                                      |  |  |  |  |  |
| <ul> <li>Workstation/Server</li> </ul>  |  |  |  |  |  |
| Installs Practice Perfect EMR & M<br>server applications, database and                    | anagement Software client applications,<br>d documentation |  |  |  |  |
| Workstation Only  |  |  |  |  |  |
| Installs Practice Perfect EMR & Management Software client applications and documentation |  |  |  |  |  |
| Server Only   |  |  |  |  |  |
| Installs Practice Perfect EMR & M<br>database and documentation                           | anagement Software server applications,                    |  |  |  |  |
| <b>√ practice</b> perfect   | < <u>B</u> ack Next > Cancel                               |  |  |  |  |

If you are installing Practice Perfect on a <u>standalone computer</u> (eg; it's the only computer using Practice Perfect) OR if you are installing Practice Perfect on one of several computers but <u>this is the main computer where the data will be located</u>, click on the <u>Workstation/Server</u> option (meaning that you want to install both the 'server' and the 'client' as outlined above)

If you are installing Practice Perfect on a second, third, etc computer at the clinic and a main computer has already been established and installed, click on the Workstation Only option.

Finally, if you are installing Practice Perfect on the <u>main computer</u> but it won't be used to actually use Practice Perfect, click on Server Only.

Follow your selection by either clicking on  $\underline{Next}$  to proceed or Cancel to end the installation.

If you selected the Workstation/Server or Server Only option, proceed to **Continue Here...** on the next page.

If you selected the Workstation Only option, you will be asked where Practice Perfect on this computer can find the server computer. The following panel will appear:



If you know the IP Address of the Practice Perfect server (the <u>main computer</u> where the data is located), select the <u>Manually</u> option. If you do not know the IP address and want to identify the computer by its *name*, select the <u>Select Server</u> from local network view option. Please note that for workstation installations where the server is located across the Internet, the <u>Manually</u> option should always be selected.

If you select the Manually option, a panel will appear asking you for the *IP address* of the Practice Perfect server. If you select the Select server from the local network view option, identify and click on the <u>main computer</u> from the list of available computers.

In either case, click on <u>N</u>ext to continue.

Continue Here...

The following panel will then appear:

| SPractice Perfect Setup Wizard  |  |  |
|---|--|--|
| Select Destination Location Where should Practice Perfect EMR & Management Software be installed? |  |  |
| Setup wizard will install Practice Perfect EMR & Management Software into the following folder.   |  |  |
| To continue, click Next. If you would like to select a different folder, click Browse.            |  |  |
| C:\Program Files (x86)\PracticePerfect Browse   |  |  |
|   |  |  |
|   |  |  |
|   |  |  |
|   |  |  |
| <pre>✓ practice perfect</pre> <pre><a href="mailto:selfact">&lt; Back</a> Next &gt; Cancel</pre>  |  |  |

Select the destination where you want Practice Perfect to be installed. It is recommended that you accept the default location. Once you have selected the installation directory (or accept the default directory), click on <u>Next</u> to continue.

The next panel will ask you under what *group* Practice Perfect should be stored in your Windows *Start List*. Again, generally you would select the default by clicking on <u>Next</u>.

Finally, you will be asked the following:



Again, click <u>Next</u> to continue. Finally, your 'last chance' screen will appear as follows:

| Setup wizard is now ready to begin installing<br>Software on your computer. | g Practice Perfect EM    | R & Management      |           |
|---|--------------------------|---------------------|-----------|
| Click Install to continue with the installation, settings.                  | , or click Back if you v | vant to review or d | hange any |
| Setup Type:   |                          |                     |           |
| Workstation/Server  |                          |                     |           |
| Selected Components:  |                          |                     |           |
| Workstation   |                          |                     | =         |
| Server  |                          |                     |           |
| Database  |                          |                     |           |
| Documentation   |                          |                     |           |
| Destination Location:   |                          |                     |           |
| C:\Program Files (x86)\PracticePerfect                                      |                          |                     |           |
| Shark Manu Fallow   |                          |                     |           |
| Start Menu Folder:  |                          |                     | -         |
|   |                          |                     |           |
|   |                          |                     |           |

Click on Install to install Practice Perfect or Cancel to stop the process. The software will then be installed.

If this is a Workstation/Server or Server only installation, one final panel will be presented to you, as follows:

| Practice Perfect Setup Wizard  |   |
|--|---|
| Create Account<br>Create a default account in Practice Perfect   |   |
| Account Information<br>Please input user name and password to<br>User Name<br>Password<br>Confirm Password<br>Office Information | to create an account in Practice Perfect. |
| ✓ practice perfect   | < <u>Back</u> Next > Cancel               |

The installation program needs some basic information about your facility prior to completion. First, every Practice Perfect user requires a *username*. An initial *username* and optional *password* must be supplied during installation (additional users and security settings can be setup as outlined in Chapter 1 of the Users' Guide).

Enter an initial *username* in the User Name field.

Next, you may supply an optional Password. There are no special requirements for password lengths or content, they can be anything you like. Re-enter the password in the Confirm Password field.

Finally, in the Facility Name field, enter the name of your Facility. When done, click on <u>N</u>ext.

Of course, all of this information can be changed once you are within Practice Perfect.

After a moment, you will be told that the installation has been completed and asked to click on Finish to return to Windows. Once you click on Finish, the process has been completed.