

Client Onboarding



Pre-Launch



Confirm



Design

Installation



Account Setup



Integration Setup

Go-Live



Username & Password



Train Staff

How Your Onboarding Works

1 Gather some information and configure your solution

2 The Zingit onboarding team will connect to your EHR and set up the Zingit connection, then build the features in your account. We don't start features until your go-live call.

3 Staff is trained and features go-live

Features & Functions

Inbox

Reviews & Reputation Management

Recalls/Reactivations

Birthday Club

Editing Appointment Reminders

Web Integrations

Broadcaster

Video

Mobile Web Page



Account Configuration Meeting

What we expect from you:

- Sign your Zingit Agreement
- Sign your LOA form if you want to use your business line
- Provide videos if you want them embedded into your texts
- Fill out the Onboarding Form

What we'll do together:

- Review your form submission
- Discuss and schedule the install



Install & Set Up

What you can expect from us:

- Engineering Team connects Zingit to your digital calendar where appointment records are stored
- Build your automation and set up your account - everything will remain off until we get on a final call
- Import your patient data



Train and Activate

What we expect from you:

- Circulate the training material to any staff that may be involved with Zingit or patient communication
- To use the Zingit Chatbot, Appointment Requester, or Review Streaming Widget on your website, you'll want to provide the document that was provided in the onboarding email to the company that hosts your website so they can embed them for you
- Come prepared to the check in call with questions

What you can expect from us:

- Login and training material provided
- Final QA of your account
- Activate your features on a predetermined date

What we'll do together:

- Hop on a final call to make sure you feel confident in the system and the set up
- Activate the automated features
- Create a transition plan away from your existing service