MAXASSIST® x Clarion SOLUTIONS

Getting started with MaxAssist

A short guide step-by-step to getting set up.

1

Setup Appointment:

A 15-minute appointment dedicated to seamlessly integrating MaxAssist with your database. In preparation for this session, kindly ensure you have access to your server and all relevant passwords necessary for accessing both the computer system and the database. If your session is coordinated through your IT provider, rest assured that we will handle all necessary communications and actions through them.

2

Onboarding Portal:

After the setup on your server is complete, you will receive an email with a link to access your MaxAssist Onboarding Portal. **This portal is where you'll provide the necessary information to create your account.** This portal will also showcase all your branded messaging, giving you the opportunity to review and either approve or customize our default settings.

3

Prep Call:

Once you've provided all required information in your onboarding portal, **an onboarding agent will reach out before your kickstart session** to validate all your account information, address any questions you may have, and ensure you are fully prepared for your upcoming training sessions.

4

Kickstart Training:

A 1-hour long session designed to have your team up and ready to use MaxAssist as quickly and efficiently as possible. **Once your Kickstart is complete, your account is live, you'll have full access, and your messaging will begin.**

5

Dashboard Training:

Enhance your productivity with our **1-hour session tailored for office managers and practice owners.** This session is crafted to empower you with a comprehensive understanding and practical utilization of MaxAssist analytics. Unlock the full potential of this software to optimize your operations and maximize your results.