**MHVI – CRM**

Login Screen

Dashboard – Home Page

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| **MHVI – CRM**  **Home**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Reports** |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Last Name:** |  |  |  | **Add / Search** |  |  |  |  |  | | --- | --- | --- | --- | |  | **Clients** | **Visits** | **Services** | | Total for (Month): | Nnnn | Nnnn | Nnnn | | Total for (Year): | Nnnn | Nnnn | Nnnn | | Overall Total: | Nnnn | Nnnn | Nnnn | |

**Intake**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **MHVI – CRM**  **Clients**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Reports** |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Last Name:** |  | Green |  | **Add** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | **Green, Matt** | **04-07-1980** |  | **Edit** |  | **Visit** |  | **Service** | |  |  |  |  |  |  |  |  | | **Green, Kim** | **01-27-1983** |  | **Edit** |  | **Visit** |  | **Service** | |

Somehow verify that the person is not already in the system. If so, allow the user to edit, add a visit or service. If new allow the user to add the new Client.

**Intake - 2**

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| **MHVI – CRM**  **Clients**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Reports** |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **Back** |  | **Visit** |  | **Service** |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **Last Name:** |  | Green | | | | | |  |  |  | | | | |  | | **First Name:** |  |  | | | | | |  |  |  | | | | |  | | **Address:** |  |  | | | | | |  |  |  | | | | |  | | **City:** |  |  | | | | | |  |  |  | | | | |  | | **State:** |  |  |  | **Zip:** | |  | |  |  |  | | |  | |  | | **Gender** |  |  | | | | | |  |  |  | | | | |  | | **Birthday** |  |  | | | | | |  |  |  | | | | |  | | **??????????:** |  |  | | | | | |  |  |  | | | | |  | | **??????????:** |  |  | | | | | |  |  |  | | | | |  | | **??????????:** |  |  | | | | |  |  |  | | --- | --- | |  | **Save** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  | |

The Last Name should automatically fill from the last screen.

**Visit**

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| **MHVI – CRM**  **Visit**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Reports** |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **Back** |  | **Visit** |  | **Service** |  |  |  |  | | --- | --- | --- | | **Date:** |  |  | |  |  |  |  | | **Staff:** |  |  | |  |  |  |  | | **Primary Purpose:** |  |  | |  |  |  |  | | **Notes:** |  |  | |  |  |  |  | | **??????????:** |  |  | |  |  |  |  | | **??????????:** |  |  |  |  |  | | --- | --- | |  | **Save** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  | |

Staff would be selected from available staff.

Purpose is from a selection.

**Visit**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **MHVI – CRM**  **Service**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Reports** |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **Back** |  | **Visit** |  | **Service** |  |  |  |  | | --- | --- | --- | | **Date:** |  |  | |  |  |  |  | | **Staff:** |  |  | |  |  |  |  | | **Service Provided:** |  |  | |  |  |  |  | | **Notes:** |  |  | |  |  |  |  | | **??????????:** |  |  | |  |  |  |  | | **??????????:** |  |  |  |  |  | | --- | --- | |  | **Save** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  | |

Staff would be selected from available staff.

Service Provided is from a selection.

**Reports**

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| **MHVI – CRM**  **Reports**   |  |  |  | | --- | --- | --- | | **User:** Bob Smith |  | **Back** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  | **Clients** |  | **Visits** |  | **Services** |  | **Staff** |  |  |  | | --- | --- | |  | **Save** |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  |  |  | |

Staff would be selected from available staff.

Service Provided is from a selection.