



Simply brilliant software



RELEASE NOTES for DRIVE

Version 3.5

INTRODUCTION

In this latest release of **DRIVE CRM and Practice Management**, and as part of our ongoing commitment towards enhancing security and user experience, we have implemented a change in our login process and updated our licencing/registration process.

Previously, users accessed the system using a unique user ID and password. However, in response to evolving B2C practices and the need for improved security, we have now integrated users' email addresses with their user IDs.

Licencing/Registration will now be handled by us using Maxio [a third-party application specifically designed for subscription management].

In this guide, we'll walk you through the process, step-by-step.

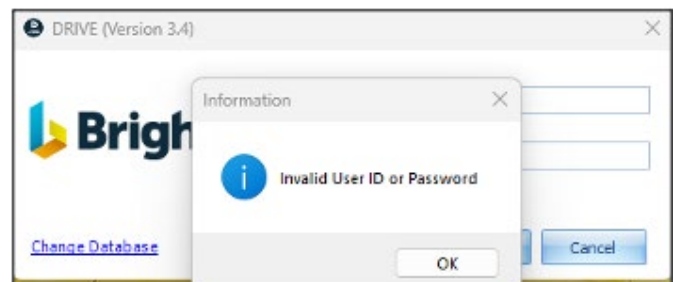
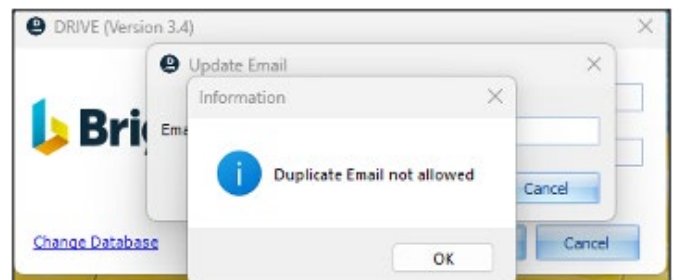
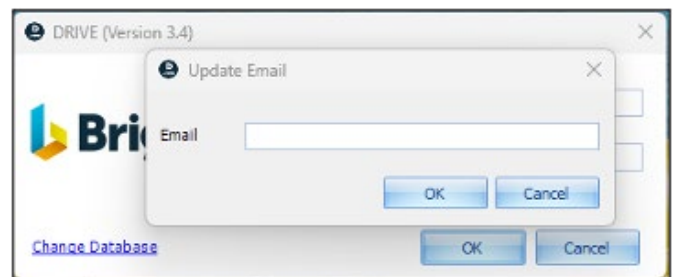
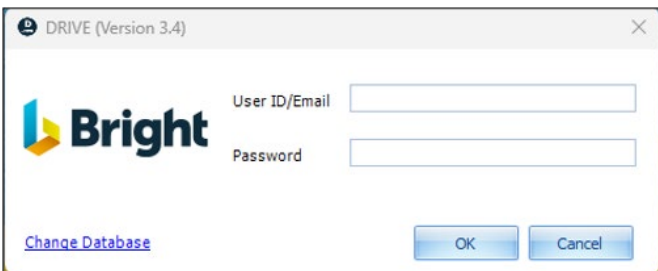
INTEGRATING YOUR EMAIL ADDRESS WITH YOUR USER ID

To integrate your email address with your user ID, please follow these steps:

1. **Update to the Latest Version:** DRIVE CRM and Practice Management Version, 3.5.
2. **Login with Current Credentials:**
 - a. Open the DRIVE CRM and Practice Management **Login dialog** box.
 - b. Enter your current **user ID** and **password**, then click **OK**.

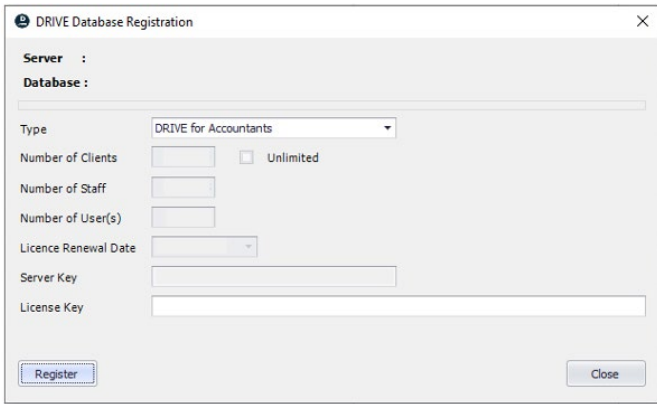
3. Enter Your Email Address:

- a. A dialog box will appear prompting you to enter your email address.
- b. Make sure to use a valid email address. If the email address is duplicate or invalid, you will receive a prompt indicating the issue.



4. Drive Database Registration:

- a. Upon successful login, you will be directed to the **DRIVE Database Registration** screen.

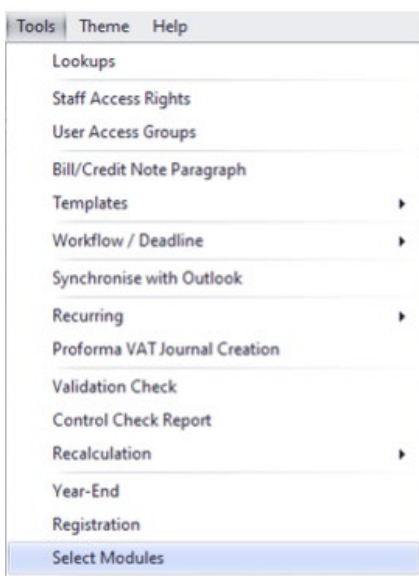


- b. Enter your **license key**, which you should have received by email.

- 5. **Complete the Registration:** Enter the license key and click **Register** to complete the integration process.

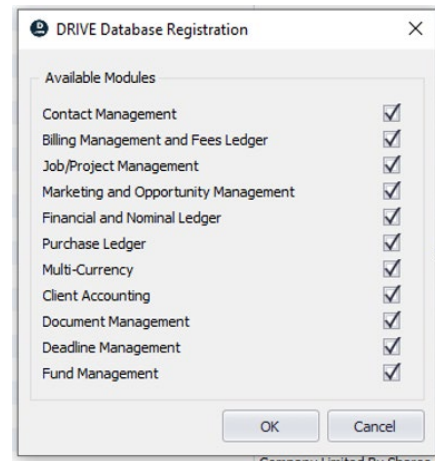
6. Customize Your Practice Panel:

- a. After successful registration, you can customize the modules displayed on your practice panel.
- b. Navigate to **Select Modules** under the **Tools** tab.



7. Select Modules:

- a. The DRIVE Database Registration, Available Modules screen will open.
- b. **Tick** the modules you want to reflect on the left panel and click **OK**.



If you encounter any issues or need further assistance, please contact our support team.