How to Manage Invitations Across Your Healthcare Organization

Organization General Set-up & Management · https://connectionpoint.com/help/docs/how-to-manage-invitations-across-your-healthcare-organization/

Invitations make it easy to invite people to create healthcare funding campaigns and other supported experiences across the ConnectionPoint platform.

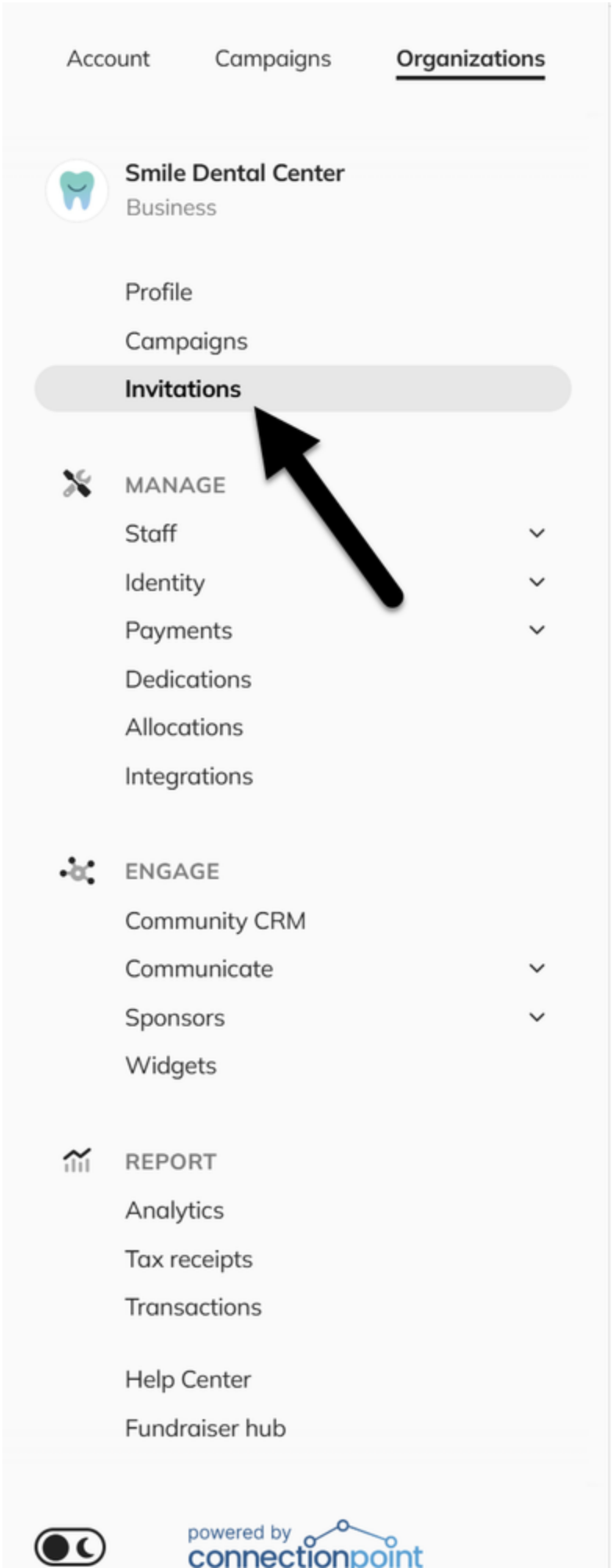
With Release 108, managing Invitations is now easier. Invitations are available directly from your **Organization menu**, allowing you to view and manage Invitations across multiple campaigns from one central location.

What's changed?
Previously, Invitations needed to be managed from within each individual campaign. Invitations can now be accessed from the Organization menu, making it easier to manage participation across multiple campaigns.

Where can I find Invitations?

To access Invitations:

1. Log in to your ConnectionPoint account.
2. Navigate to your **Organization**.
3. Select **Invitations** from the Organization menu.


Account
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Organizations
Smile Dental Center
Business
Profile
Campaigns
Invitations
MANAGE
Staff
Identity
Payments
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Allocations
Integrations
ENGAGE
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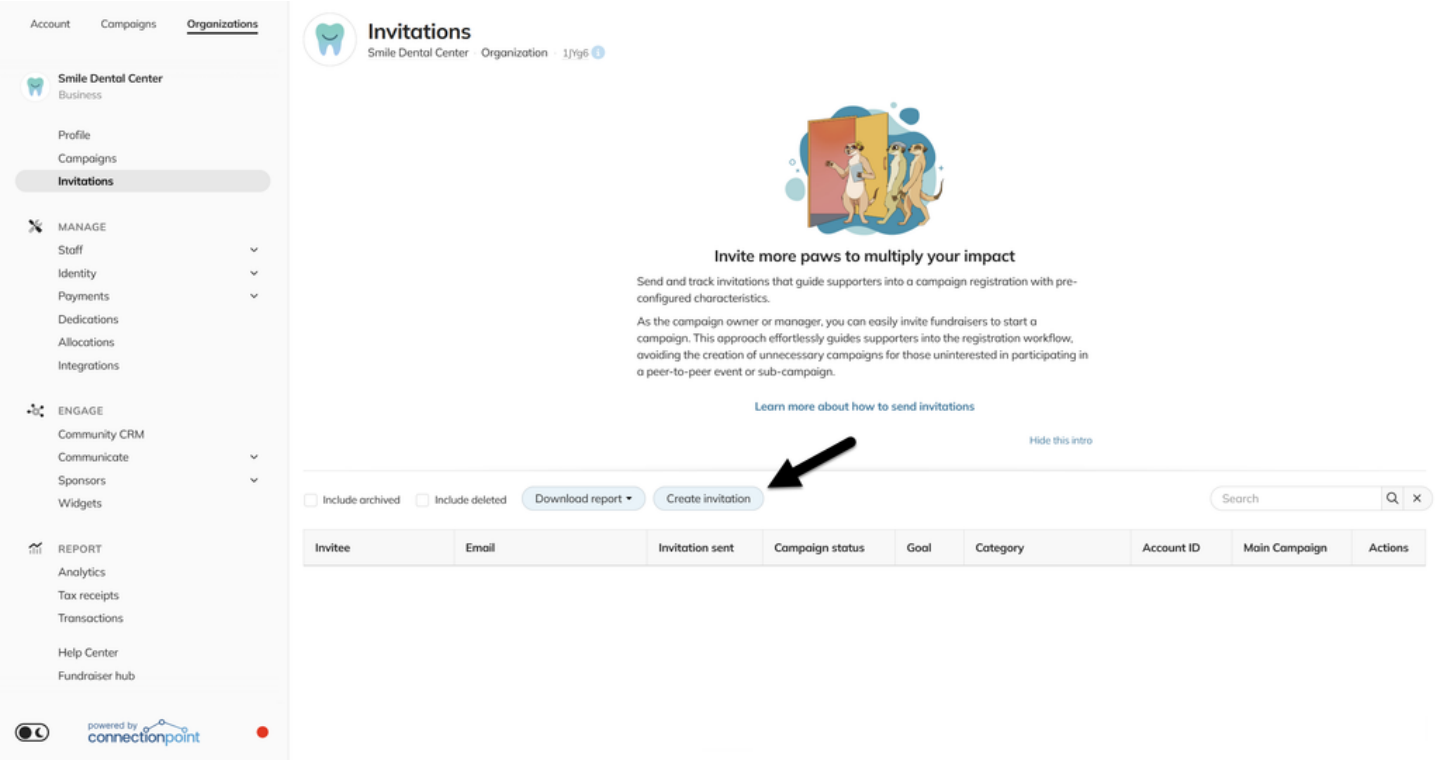
From here, you can view active Invitations across your organization’s campaigns and create new Invitations for campaigns that support this feature.

What can I do from the Invitations page?

From the Organization-level Invitations page, you can:

- View active Invitations across your campaigns
- Create new Invitations without first opening a specific campaign
- Manage Invitations from one central location
- Quickly identify which campaigns have active Invitations



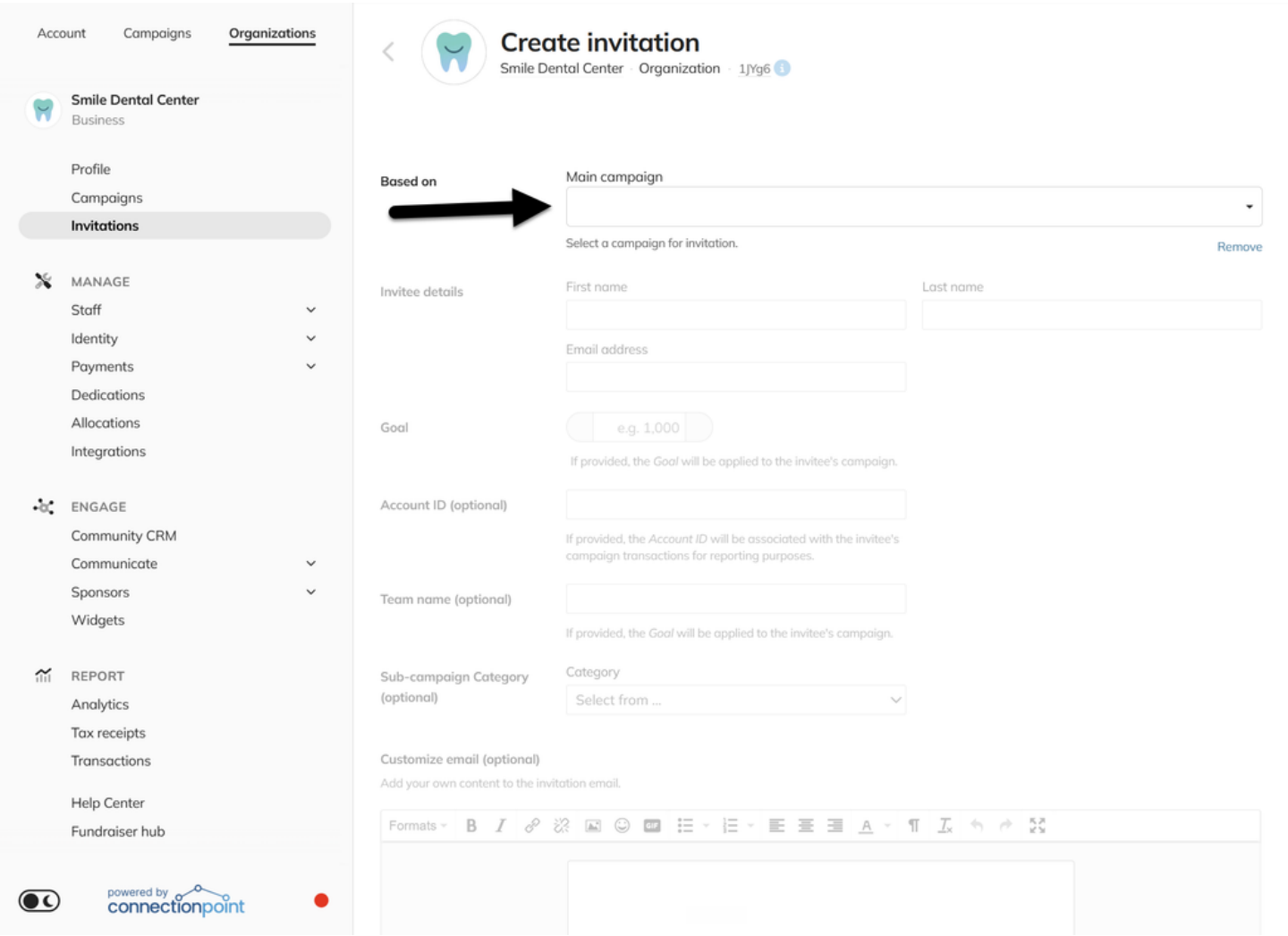
- Active Invitations list
- Campaign name/association
- Invitation status (if available)
- "Create Invitation" button

Caption: Viewing and managing Invitations across your campaigns

Creating a new Invitation

To create a new Invitation:

1. Go to your Organization.
2. Select **Invitations**.
3. Click **Create Invitation**.



4. Select the campaign you want the Invitation associated with.
5. Add the required participant details. Make sure you include the patient's ID number for your clinical management system.
6. Send the Invitation.

- Campaign selection
- Participant information fields

- Send/Submit button

The person receiving the Invitation will be guided through the steps needed to participate based on the campaign type and setup.

Which campaigns support Invitations?

Invitations are available for all campaigns that support Registration.

Availability may vary depending on your enterprise or organizational account configuration.