



## Email Notifications

Email Type	Description	Recipient	Trigger	Product	Payment Plan service Enabled via OrthoBanc
New User	Welcome email to new users when an account is created	Client Users	User account is successfully created	AccepTx Pro	Not Required
Forgot Password	Update a forgotten password to regain access to the AccepTx Pro	Client Users	User password changes (Forgot password link)	AccepTx Pro	Not Required
Reset Password	Email sent to user after password has been reset by user (following admin choosing Reset Password in user actions dropdown)	Client Users	User resets password through the AP Reset Password pages	AccepTx Pro	Not Required
Re-enabled User Account	Email sent to user when the user's account has been re-enabled	Client Users	Admin changes the user's status from inactive to active (re-enabling the user)	AccepTx Pro	Not Required
Share Presentation	Email RP access to treatment package presentation	RP	TC selects the "Share" button and the email address is entered	AccepTx Pro	Not Required
First Appointment Date Set	Alert when the TC sets the appointment/payment date	RP	User saves the first appointment/payment date AND the Responsible Party has a valid email address	AccepTx Pro	Not Required
RP eSigns Agreement - Appointment Date Needed	Alert when the treatment agreement is signed and the patient needs first appt date set	TC	RP eSigns the Treatment Agreement, AND 1st appt date not set, AND Practice Setting for email alerts is on	AccepTx Pro	Optional
RP eSigns Agreement	Alert when the RPP is signed	TC	RP eSigns the OB Recurring Payment Plan (RPP) agreement AND Practice Setting for email alerts is on	AccepTx Pro & OrthoBanc	Both Required