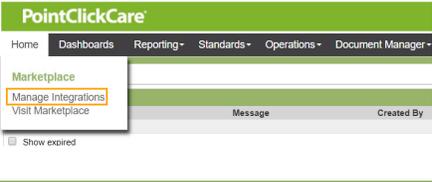
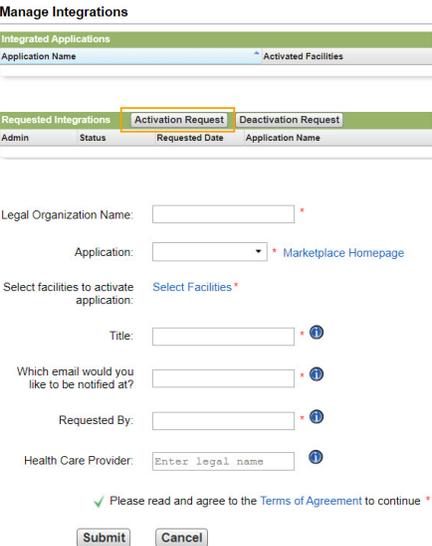


# Self Serve Activation for Marketplace Applications Quick Reference Guide

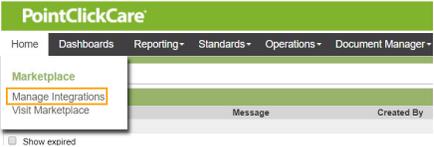
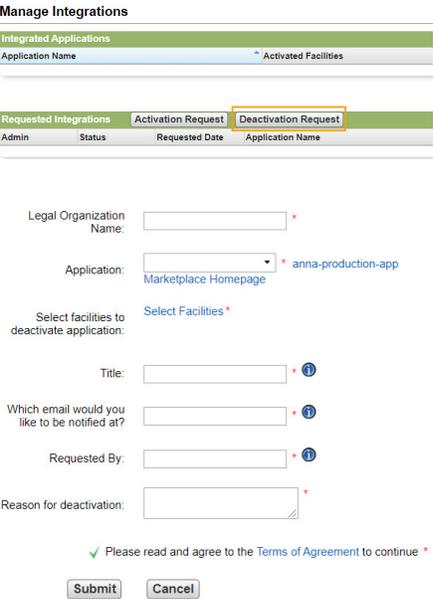
This quick reference guide provides the steps required to activate and deactivate Marketplace applications. To learn more about Marketplace applications, visit the [Marketplace](#).

| Step                                | Action   | Application View  |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
|-------------------------------------|--|---|--|-----------|------------|--------------------------|----------|-----|--------------------------|-------------|-------|-------------------------------------|----------------|----------------|--------------------------|----------|-------|--------------------------|--------------|---------|--------------------------|------------|--------|--------------------------|--------------|----------|
| 1.                                  | <p><b>Assign Application Activation security</b></p> <div data-bbox="391 569 950 674" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  <p><b>NOTE</b><br/>You must assign security before you can complete application activation.</p> </div> <ol style="list-style-type: none"> <li>1. Login to PointClickCare.</li> <li>2. Do one of the following:                             <ul style="list-style-type: none"> <li>• Single facility: Admin &gt; Setup &gt; Security Roles.</li> <li>• Multi-facility: Management Console &gt; Standards &gt; Financial Management &gt; Security Roles.</li> </ul> </li> <li>3. Assign system security role:                             <ul style="list-style-type: none"> <li>• Authorized Vendor Application Purchaser</li> </ul> </li> </ol> <div data-bbox="431 1003 950 1108" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  <p><b>NOTE</b><br/>For multi-facility organizations, you must also have access to the Management Console.</p> </div> <ol style="list-style-type: none"> <li>1. Click <b>users</b>.</li> <li>2. Select applicable user(s).</li> <li>3. Click <b>Save</b>.</li> </ol> <ol style="list-style-type: none"> <li>4. To immediately apply security updates to users currently logged in, scroll to the bottom of Security Roles and click <b>clicking here</b>.</li> </ol> | <p><a href="#">users</a> <a href="#">print</a> <a href="#">copy</a> Authorized Vendor Application Purchaser</p> <div data-bbox="1003 590 1442 856" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p><b>Users Assigned to Authorized Vendor Application Purchaser</b></p> <table border="1"> <thead> <tr> <th></th> <th>User Name</th> <th>Login Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>BOM Role</td> <td>bom</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Hanna Abbot</td> <td>hanna</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Harold Swanson</td> <td>harold.swanson</td> </tr> <tr> <td><input type="checkbox"/></td> <td>jane doe</td> <td>janed</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Jaxon Solits</td> <td>jsoltis</td> </tr> <tr> <td><input type="checkbox"/></td> <td>John Davis</td> <td>jdavis</td> </tr> <tr> <td><input type="checkbox"/></td> <td>John McGinty</td> <td>jmcginty</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p> </div> <p><small>Any role updates made will take effect the next time a user logs in to the system.<br/>Role updates can be applied immediately to user's currently logged in by <a href="#">clicking here</a>.<br/>All role updates should be completed before applying them to current users.</small></p> |  | User Name | Login Name | <input type="checkbox"/> | BOM Role | bom | <input type="checkbox"/> | Hanna Abbot | hanna | <input checked="" type="checkbox"/> | Harold Swanson | harold.swanson | <input type="checkbox"/> | jane doe | janed | <input type="checkbox"/> | Jaxon Solits | jsoltis | <input type="checkbox"/> | John Davis | jdavis | <input type="checkbox"/> | John McGinty | jmcginty |
|                                     | User Name  | Login Name  |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | BOM Role   | bom   |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | Hanna Abbot  | hanna   |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input checked="" type="checkbox"/> | Harold Swanson   | harold.swanson  |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | jane doe   | janed   |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | Jaxon Solits   | jsoltis   |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | John Davis   | jdavis  |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |
| <input type="checkbox"/>            | John McGinty   | jmcginty  |  |           |            |                          |          |     |                          |             |       |                                     |                |                |                          |          |       |                          |              |         |                          |            |        |                          |              |          |

## Self Serve Activation for Marketplace Applications Quick Reference Guide

| Step | Action  | Application View  |
|------|---|---|
| 2.   | <p><b>Activate a new application</b></p> <ol style="list-style-type: none"> <li>1. Login to PointClickCare.</li> <li>2. Do one of the following:                             <ul style="list-style-type: none"> <li>• Single facility: Home &gt; Marketplace &gt; Manage Integrations.</li> <li>• Multi-facility: Management Console &gt; Home &gt; Manage Integrations.</li> </ul> </li> <li>3. Click <b>Activation Request</b>.</li> <li>4. Complete the following:                             <ul style="list-style-type: none"> <li>• <b>Legal Organization Name</b> - Type your legal organization name at the time of submitting the application activation request.</li> <li>• <b>Application</b> - Select an application.</li> <li>• <b>Select facilities to activate application</b> - Select the facilities in which the application is installed.</li> <li>• <b>Title</b> - Type the title of the authorized requester.</li> <li>• <b>Which email would like to be notified at?</b> - Type email address. This email is used for communication regarding this request.</li> <li>• <b>Requested By</b> -Type the first and surname of the requester. Requester must be an authorized signer for your organization.</li> <li>• <b>Health Care Provider</b> - Type the Health Care Provider name.</li> <li>• <b>Please read and agree to the Terms of Agreement to continue</b> - Read the Terms of Agreement and click <b>Accept</b>.</li> </ul> </li> <li>5. Click <b>Submit</b>.</li> </ol> | <p><b>Single facility</b></p>  <p><b>Multi-facility</b></p>  <p><b>Manage Integrations</b></p>  |

## Self Serve Activation for Marketplace Applications Quick Reference Guide

| Step | Action   | Application View   |
|------|--|--|
| 3.   | <p><b>Deactivate an application</b></p> <ol style="list-style-type: none"> <li>1. Login to PointClickCare.</li> <li>2. Do one of the following: <ul style="list-style-type: none"> <li>• Single facility: Home &gt; Marketplace &gt; Manage Integrations.</li> <li>• Multi-facility: Management Console &gt; Home &gt; Manage Integrations.</li> </ul> </li> <li>3. Click <b>Deactivation Request</b>.</li> <li>4. Complete the following: <ul style="list-style-type: none"> <li>• <b>Legal Organization Name</b> - Type your legal organization name at the time of submitting the deactivation request.</li> <li>• <b>Application</b> - Select an application.</li> <li>• <b>Select facilities to deactivate application</b> - Select the facilities in which the application is installed.</li> <li>• <b>Title</b> - Type the title of the authorized requester.</li> <li>• <b>Which email would like to be notified at?</b> - Type email address. This email is used for communication regarding this request.</li> <li>• <b>Requested By</b> -Type the first and surname of the requester. Requester must be an authorized signer for your organization.</li> <li>• <b>Reason for deactivation</b> - Type the reason.</li> <li>• <b>Please read and agree to the Terms of Agreement to continue</b> - Read the Terms of Agreement and click <b>Accept</b>.</li> </ul> </li> <li>5. Click <b>Submit</b>.</li> </ol> |    <p>The 'Manage Integrations' form includes the following fields:</p> <ul style="list-style-type: none"> <li>Legal Organization Name: <input type="text"/></li> <li>Application: <input type="text" value="anna-production-app"/> (Marketplace Homepage)</li> <li>Select facilities to deactivate application: <input type="text" value="Select Facilities"/></li> <li>Title: <input type="text"/></li> <li>Which email would you like to be notified at?: <input type="text"/></li> <li>Requested By: <input type="text"/></li> <li>Reason for deactivation: <input type="text"/></li> </ul> <p>At the bottom, there is a checkbox for 'Please read and agree to the Terms of Agreement to continue' and 'Submit' and 'Cancel' buttons.</p> |