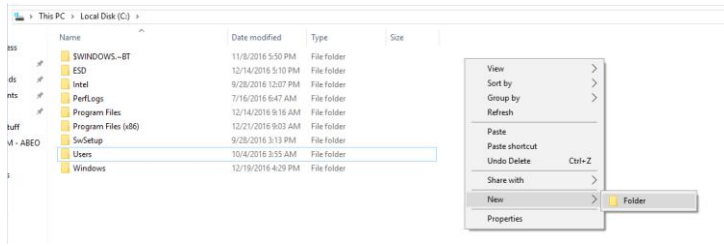
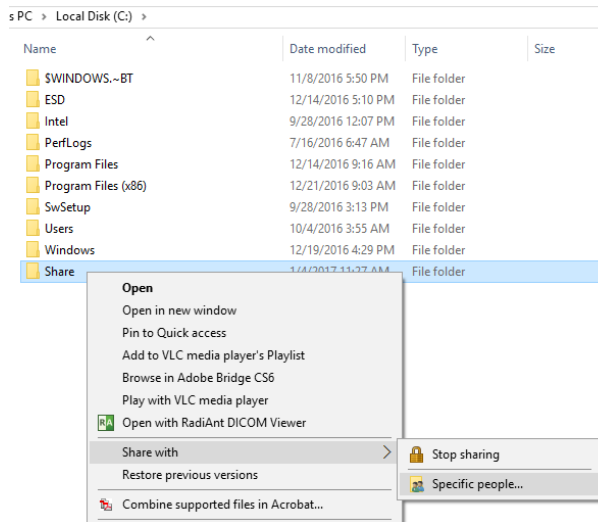


# WINDOWS CONFIGURATION

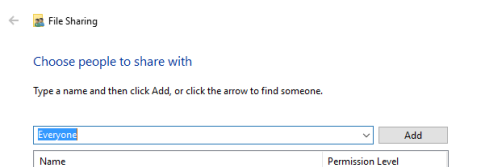
1. Go to the App store on your iPad and purchase CrystalPM Signature Capture then install.
2. On the computer you will mainly be importing the documents on:
  - a. Create a new folder on the root of the C: drive. Name it "Share" (C:\Share)



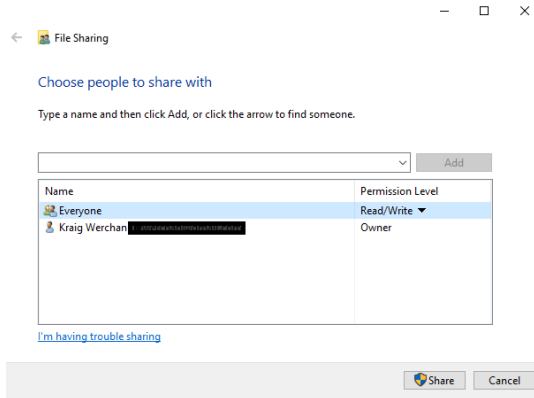
- b. Right-click on the folder and select "Share with" and the "Specific people"



- c. In the blank, enter "Everyone" then click "Add"

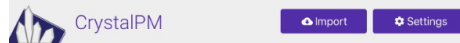


- d. Adjust the permission level for Everyone to "Read/Write" then "Share"

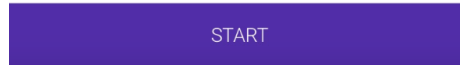


- e. This will be the folder that temporarily stores the patients signature to import

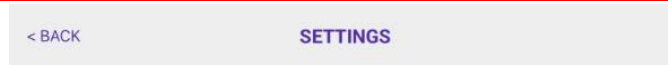
3. Find your computer's IP address: <https://support.microsoft.com/en-us/help/15291/windows-find-pc-ip-address>
4. Open the CrystalPM app on the iPad.



Import PDF documents using the import button above



5. Click the Settings icon in the upper right corner.
6. Here you can enter your company name if you choose. This will appear at the bottom of the document. **When done, click the "keyboard down" icon in the bottom right of the keyboard.**



Your company name  
CrystalPM

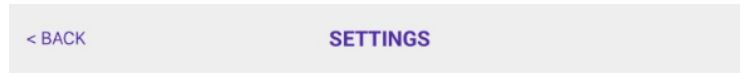
Add company name to generated document

Require at least one document to start

Save

The image shows the settings configuration area. It includes a text input field with the label 'Your company name' and the text 'CrystalPM' entered. Below this are two toggle switches, both of which are turned on (green). The first toggle is labeled 'Add company name to generated document' and the second is labeled 'Require at least one document to start'. At the bottom right of this section is a purple 'Save' button.

7. Select “SMB/CIFS” then switch to “Enabled”
8. Enter the computers IP address from Step 3 along with the folder name “Share”. If you require a username and password when logging into Windows, you’ll want to enter that here, as well.



Enabled  ?

Server IP address (e.g. 192.168.1.1)  
192.168.1.165 ?

Server share name  
Share ?

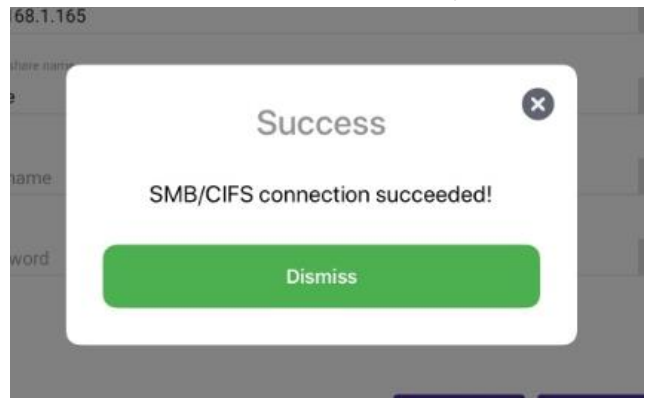
Username ?

Password ?

Test Save

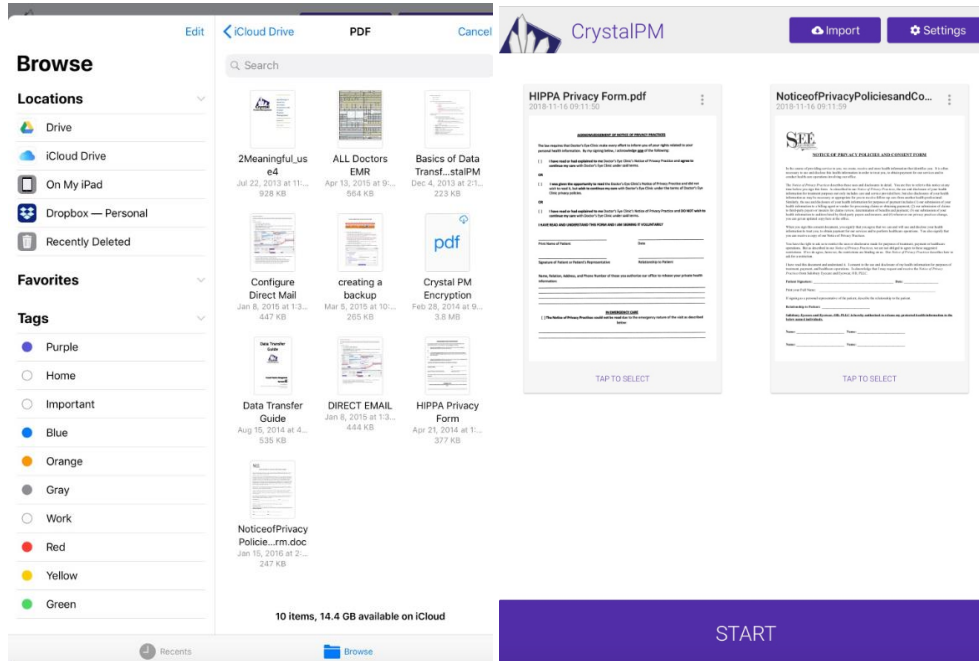


9. Click Verify and look for the Connection Successful window, then Save



10. In Crystal go to Configuration and click iPad. This will open a window requiring you to point Crystal to the “Share” folder.
11. This will also add a button to the Patient – Additional Info page called “iPad” that will import the most recent signed document (**you must import immediately when a doc is signed!**)

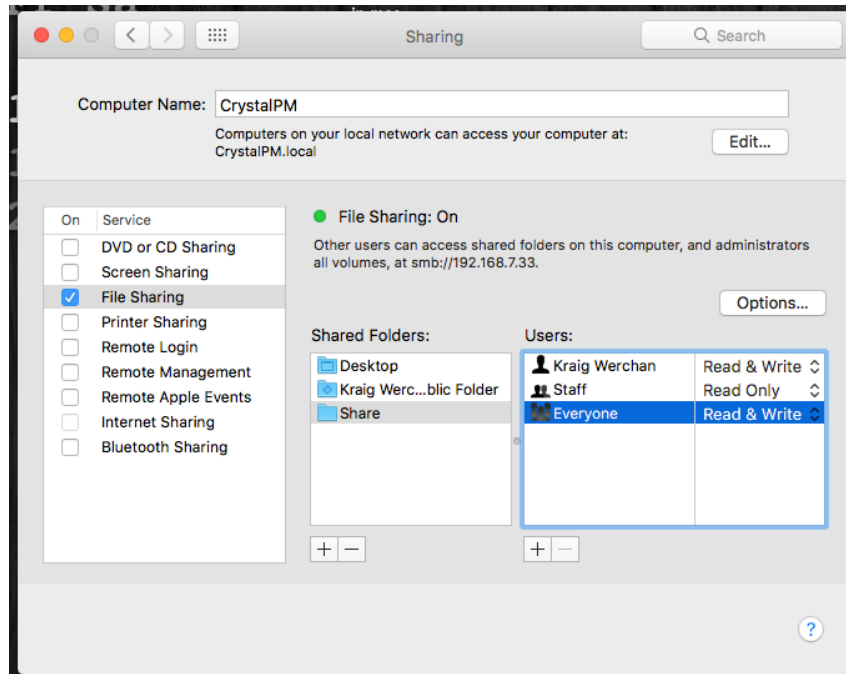
12. On the computer that contains the PDF files that you want the patients to sign:
  - a. Go to [www.icloud.com](http://www.icloud.com) and log in (must be the same account that is on the iPad)
  - b. Go to iCloud Documents
  - c. Add a folder to hold your PDF documents
  - d. Drag and drop PDF documents to this new folder
13. Go back to the home page, click Import, then select your PDF folder and the documents you want to import. Repeat this step until all documents are imported.



14. YOU ARE READY TO START USING THE APP!!!

## MAC CONFIGURATION

1. Go to the App store on your iPad and purchase (CrystalPM Signature Capture then install.
2. On the Mac that you will be importing the documents on:
  - a. Create a new folder on your desktop or in Documents and name it “Share”
  - b. Choose Apple→System Preferences (or click the System Preferences icon in the Dock).
  - c. In the System Preferences window, click the Sharing icon.
  - d. Click File Sharing in the list of services on the left.



3. Click the + (plus) button under the Shared Folders column to add the folder you wish to share.

If you select the Shared Folder check box in a folder's Get Info window, that folder already appears in the list of Shared Folders, so you won't have to bother with Step 4.

Alas, while checking the Shared Folder check box in a folder's Get Info window causes it to appear in the Sharing System Preferences pane's Shared Folders list, you still have to complete the steps that follow to assign that folder's users and privileges.

4. Click the + (plus) button under the Users column to add a user or group if the user or group you desire isn't already showing in the Users column.

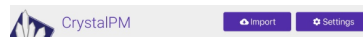
5. Click the double-headed arrow to the right of a user or group name and change its privileges.

You can choose among three types of access for each user or group.

If you're the folder's owner (or have administrator access), you can click the padlock icon and change the owner and/or group for the file or folder.

6. This will be the folder that temporarily stores the patients signature to import

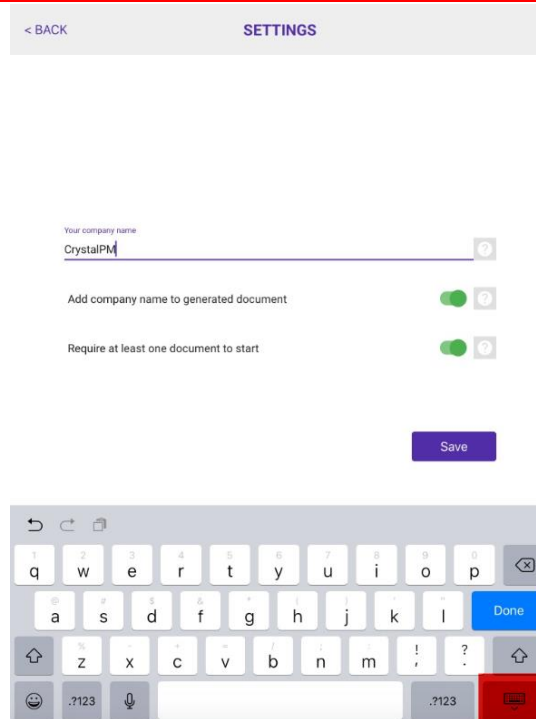
7. Open the CrystalPM app on the iPad.



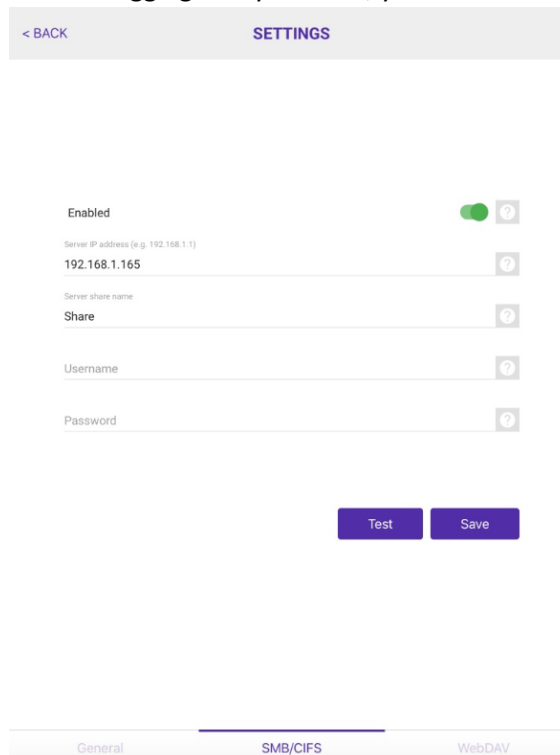
Import PDF documents using the Import button above

START

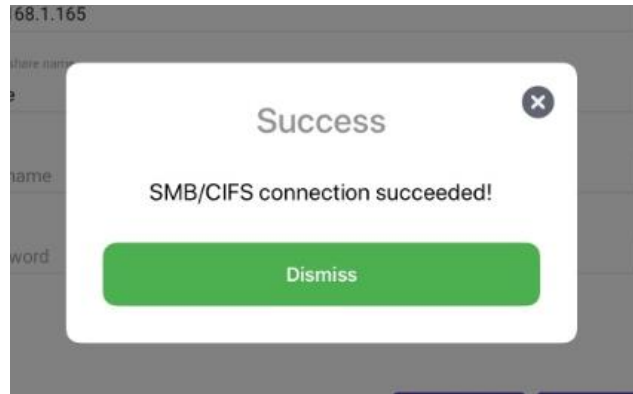
- Click the Settings icon in the upper right corner.
- Here you can enter your company name if you choose. This will appear at the bottom of the document. **When done, click the “keyboard down” icon in the bottom right of the keyboard.**



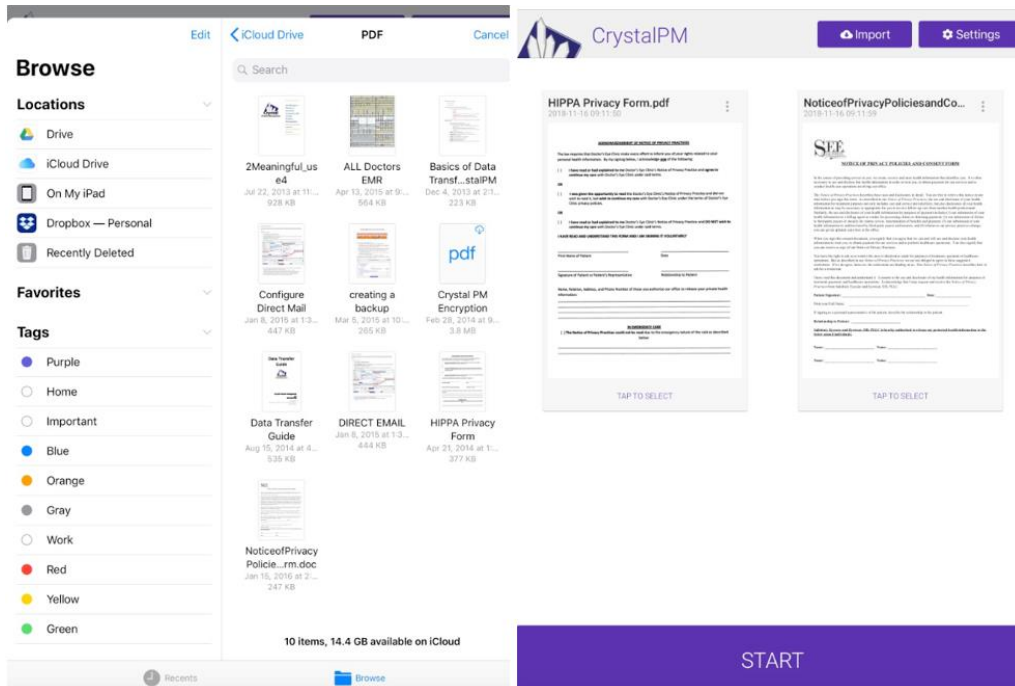
- Select “SMB/CIFS” then switch to “Enabled”
- Enter the name of the computer from Step 3 along with the folder name “Share”. If you require a username and password when logging into your Mac, you’ll want to enter that here, as well.



12. Click Verify and look for the Connection Successful window, then Save



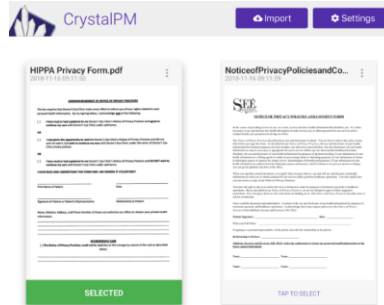
13. On the computer that contains the PDF files that you want the patients to sign:
- a. Go to [www.icloud.com](http://www.icloud.com) and log in (must be the same account that is on the iPad)
  - b. Go to iCloud Documents
  - c. Add a folder to hold your PDF documents
  - d. Drag and drop PDF documents to this new folder
14. Go back to Settings, click Import, then select your PDF folder and the documents you want to import. Repeat this step until all documents are imported.



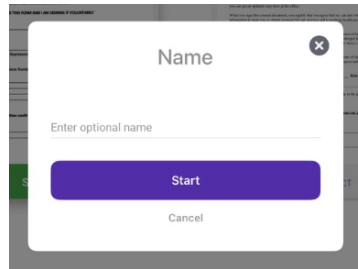
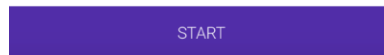
15. YOU ARE READY TO START USING THE APP!!!

# USE

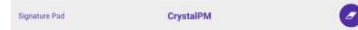
1. In Crystal, go to Configuration and select iPad. This will enable iPad buttons next to the signature section in Patient – Additional Info. (DO NOT CLICK THESE BUTTONS YET!)
2. In the app, tap the document(s) want the patient to sign. This will mark them as SELECTED



3. Click START. Here, you can either enter the patient's name which will show at the bottom of the document or just click Start again.

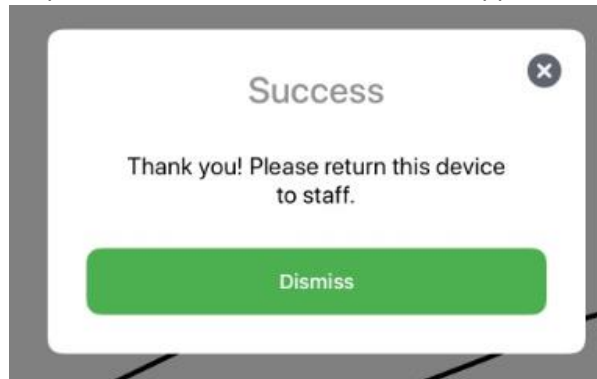


4. Hand the tablet to the patient
5. The patient will review each document, clicking agree at the end.
6. Once all documents have been viewed, a signature screen will appear.
7. The patient signs with his/her finger, then taps "Finish"





8. You will see a saving prompt, and then a Success window will appear.



9. In Crystal, go to Patient – Additional Info and click “iPad”. The first time you click this, it will ask you to browse to the location of the saved file in the Share folder. **This will import the most recently saved file, so be sure to do this before handing the iPad to the next patient!**