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INTRODUCTION

These notes serve as a guide to working with Digita Practice Advanced in an integrated environment with other Digita applications. An integrated environment enables a single entry point of data and negates the time and risk in duplicating client information.
PRE-REQUISITES

For Digita Practice Advanced to work in an integrated state you must first install Digita Practice Management version 3.6.1968 or above and create a user within that application.
CONTROLLING INTEGRATION

When Digita Practice Advanced locates Digita Contact Manager the integration function is enabled automatically.

There may however be circumstances where you do not require integration to be enabled. Integration between Digita Practice Advanced and Digita Contact Manager can be enabled/disabled and managed generally from within Digita Practice Advanced as follows:

1. Select Setup | Integration | Options from the main menu to display the Integration Options dialog which in the illustration below displays integration as enabled:

   ![Integration Options Dialog]

2. Select Override general configuration and Disable Integration to disable integration.
CREATE AN INTEGRATED CLIENT

With integration enabled you can add new clients from either the Clients list, or from the Manage Clients display.

From the Clients list:

1. To access the Clients list either select Setup | Clients from the main menu, or click on the Clients button and select the Clients option from the vertical Setup menu.
2. From the client display click on the Add button.
3. The Digita Contact Manager selection screen will appear:

![Select Person Window]

4. By default the Type box shows person contacts, select other entity types from the drop-down list as required.
5. Select the client from the list displayed and click OK to bring the client information into Digita Practice Advanced.

From the Manage Clients display:

1. Select Actions | Manage Clients from the main menu to open the Manage Clients display:
2. From the Clients tab right-click on the display and select the Add Client option.
3. Follow steps 3 to 5 of Clients list instructions above.
WHICH INFORMATION IS INTEGRATED?

Not all Digita Practice Advanced (DPA) information is integrated with Digita Contact Manager (DCM). Currently fields shown in the Main tab are imported but not integrated and the information on the Contact Info tab is integrated. Below are the fields that are derived from Digita Contact Manager:

Fields imported from Digita Contact Manager but not integrated: These fields are one way so they will be imported from Digita Contact Manager when the client is first generated, but any changes made in either DCM or DPA will not be transferred between either applications:

- First Name (s) – Person
- Last Name – Person
- Company Name
- File as – Shown in the description field in DPA.

Fields integrated with Digita Contact Manager:

- Name
- Code
- Title
- Primary contact, note sole Trade defaults to Proprietor if no primary contact set
- Start from Client Start date
- Left from Client end date
- FileAs
- Salutation is now brought in from Personal salutation
- Trading As is mapped onto Name 2
- FYE Month is now mapped onto FYE
- Client status
- Phone
- Mobile
- Fax
- Extension number
- Address (the first two Address lines plus City, County, Postcode and Country).
- Email Address
- Website

Note: There is currently no option to share clients from Digita Practice Advanced with Digita Contact Manager. If an integration link is broken or integration is disabled and a client generated, that information cannot be shared with Digita Contact Manager when integration is re-enabled.

Integrated data field limitations:

- Client First names and Surnames are limited to 100 characters, anything above this will be truncated.
- The Client code is limited to 10 characters and cannot include non alpha-numeric characters. An enhancement request has been raised to expand this field.
- FYE month is mapped on to FYE if this is not set in Contact manager, this then defaults to Dec in Practice Advanced
- Phone numbers are limited to 30 characters and phone number extensions are limited to 5 characters. If numbers are longer than this Digita Practice Advanced returns a suitable error message and ignores the data from Digita Contact Manager.
- It is only possible to input two Address lines in Digita Practice Advanced. Each address line can only be a maximum of 40 characters. If there are more than two address lines in Digita Contact Manager the third address line will be ignored. In the example below Address Line 3 will not be imported into Digita Practice Advanced:
Where an issue is encountered an Issue Viewer is shown outlining the error:

- **Town** and **Country** fields are limited in Digita Practice Advanced to 25 characters.
- If a new **Country** is added to the address details in Digita Contact Manager, this information is not shown in Digita Practice Advanced. This has already been raised as an enhancement request.
- The **email address** listed in Digita Practice Advanced will only show the Primary email address from Digita Contact Manager if more than one has been entered. Again a feature request has already been raised to expand upon this.
- If an **address** has been changed in Digita Contact Manager using **Tools | Manage Addresses**, the change will not be reflected in Digita Practice Advanced (But if it is edited on the client contact details it will update Digita Practice Advanced).
- When a new client is generated in Digita Practice Advanced the **client name** and **code** are imported, but any subsequent changes to these fields in Digita Contact Manager are not reflected in the **Main** tab within Digita Practice Advanced.
EDITING INTEGRATED CLIENTS

Make changes to clients within Digita Practice Advanced as follows:

1. Open the Clients display.
2. Click the Edit button from the bottom left hand corner. Any greyed out fields represent integrated data.
3. Move your pointer to the Integration toolbar, just above the tabs, and click on the Edit button.
4. The contact card from Digita Contact Manager will be displayed.
5. Make the necessary changes in Digita Contact Manager and Save and Close.
6. You are returned to Digita Practice Advanced. The Integration toolbar reflects that changes have been made and will display an orange icon with a review and apply changes message:

   Contact 1 data has changed in Digita Contact Manager. Click here to review and apply changes. Edit 1, Contact

7. Click on the message to open a Changes Available dialog:

   Changes Available

   Changes identified, how should they be applied?
   You should review the changes identified in the central client list, then decide whether to apply them to your local record.

   > Apply Changes Now
   Update your local records with the changes identified in the list.

   > Ignore Changes
   Temporarily ignore these changes. The changes remain outstanding, to be reviewed at a later date.

   Cancel  Help

8. Click the review link to see a list of the changes that have been made if required and either click Apply Changes Now to update the information in Digita Practice Advanced, or select to Ignore Changes.
9. Click the Enter button at the bottom right of the screen to commit the changes to Digita Practice Advanced.
10. Once the changes have been applied the Integration icon will change from orange to green.
11. If changes have been made to integrated clients via Digita Contact Manager an orange integration icon will be displayed next to each affected client in the Clients list:

   Click on each client to open and apply the changes as described above.
Known issues

Deleting a contact from Digita Contact Manager that is an integrated contact to a client in Digita Practice Advanced breaks the integration link for the client in Digita Practice Advanced.