

Main Menu Link Management

Purpose	Create and maintain external web links that users can open from the CAREWare main menu.
Who should do this	CAREWare administrators or designated support staff with access to Central Administration, Administrative Options, and Custom Features.
Use this setup when	An approved website or resource should be available from the External Links menu.
Main warning	Main menu links are centrally managed and shared with users. Verify the destination before saving, and never include credentials, tokens, or client identifiers in the URL.
Video walkthrough	Main Menu Link Management Video

Quick path

Central Administration > Administrative Options > Custom Features > Main Menu Link Management > Add

Before you begin

- Confirm that the top banner shows Central Administration.
- Prepare approved Link Text, a clear Description, and the complete destination URL.
- Use https:// whenever the destination supports it, and open the site in a browser before adding it.
- Confirm the link is appropriate for the users and providers that may see it.

Important

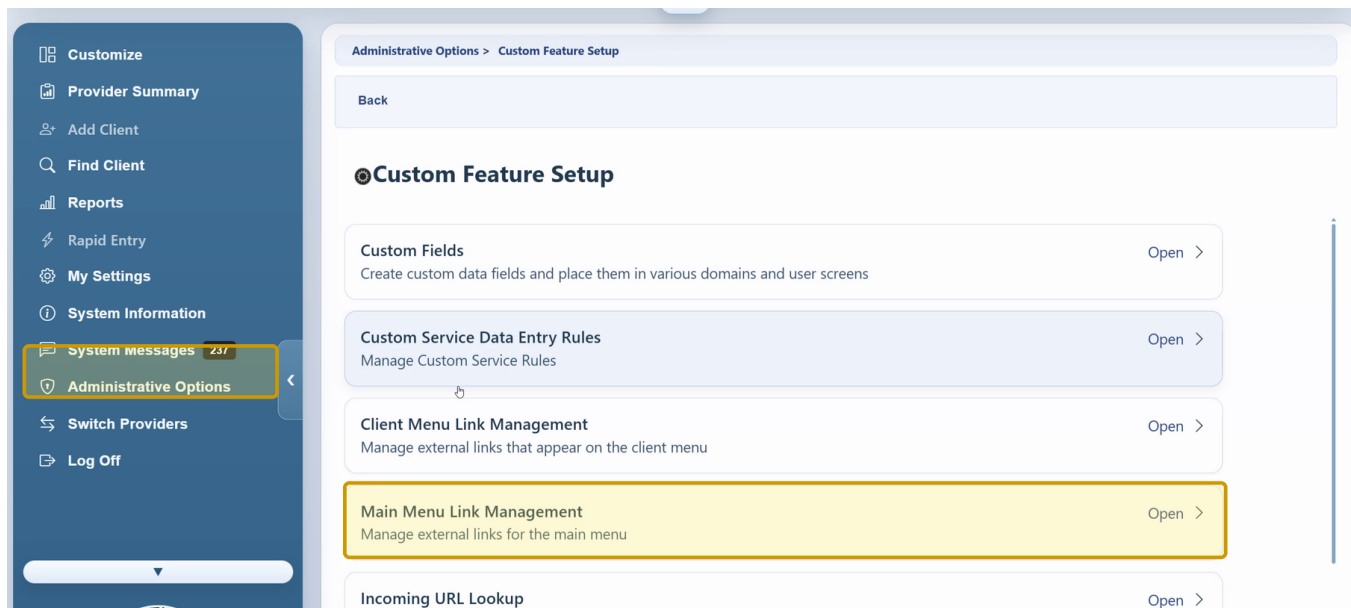
Use durable link text and coordinate changes before renaming or deleting an established link. A main menu link may be part of training materials and routine staff workflows.

Open Main Menu Link Management

Step 1. Click Administrative Options.

Step 2. Click Custom Features.

Step 3. Click Main Menu Link Management.



Tip

Complete this setup in Central Administration so the link can be managed as a shared main-menu resource for providers.

Add an external link

Step 4. On the Main Menu External Links list, click Add.

Administrative Options > Custom Feature Setup > Main Menu External Links

View **Add** HTTP Fields Delete Change Link Label Back Print or Export Column visibility Copy

Main Menu External Links

Search: << < > >> 100 entries per page Showing 0 to 0 of 0 entries

Link Text	Description	URL	HTTP Fields
No Records to display			

Step 5. Enter concise Link Text that users will recognize.

Step 6. Enter a Description that explains the destination.

Step 7. Enter the complete URL, beginning with lowercase https:// or http://.

Administrative Options > Custom Feature Setup > Main Menu External Links > Main Menu External Links

Save Back

Main Menu External Links

Link Text:

Description:

URL:

Important

Prefer https:// when available. Do not place usernames, passwords, access tokens, client identifiers, or other sensitive values in the URL.

Save and confirm the link

Step 8. Click Save.

Step 9. Confirm that the Link Text, Description, and URL appear in the list.

Administrative Options > Custom Feature Setup > Main Menu External Links

View Add HTTP Fields Delete Change Link Label Back Print or Export Column visibility Copy

Main Menu External Links

Search: << < 1 > >> Go to page 1 100 entries per page Showing 1 to 1 of 1 entry

Link Text	Description	URL	HTTP Fields
Main Menu FAQ Link	Link to FAQ	https://jprog.happyfox.com/home	

Review before release

- Check spelling and capitalization in the Link Text.
- Confirm the Description is useful to staff and does not include confidential information.
- Open the URL independently and confirm that it resolves to the intended site.

Tip

A clear, stable label is easier to recognize in the External Links menu and remains understandable in training materials.

Verify the link from a provider

Step 10. Click Switch Providers.

Step 11. Select a provider, then click Switch Providers.

Choose a new provider

Switch Providers Back Print or Export Column visibility ▾ Copy

Choose a new provider

Search:

« < 1 > » Go to page 1 ▾ 100

Provider ▾

- ADAP
- Central Administration
- Default
- Test Provider

Step 12. Click External Links in the main menu.

Step 13. Click the new link.

Customize Provider Summary Add Client Find Client Reports Rapid Entry Appointments My Settings System Information System Messages 6 Administrative Options Switch Providers Log Off External Links

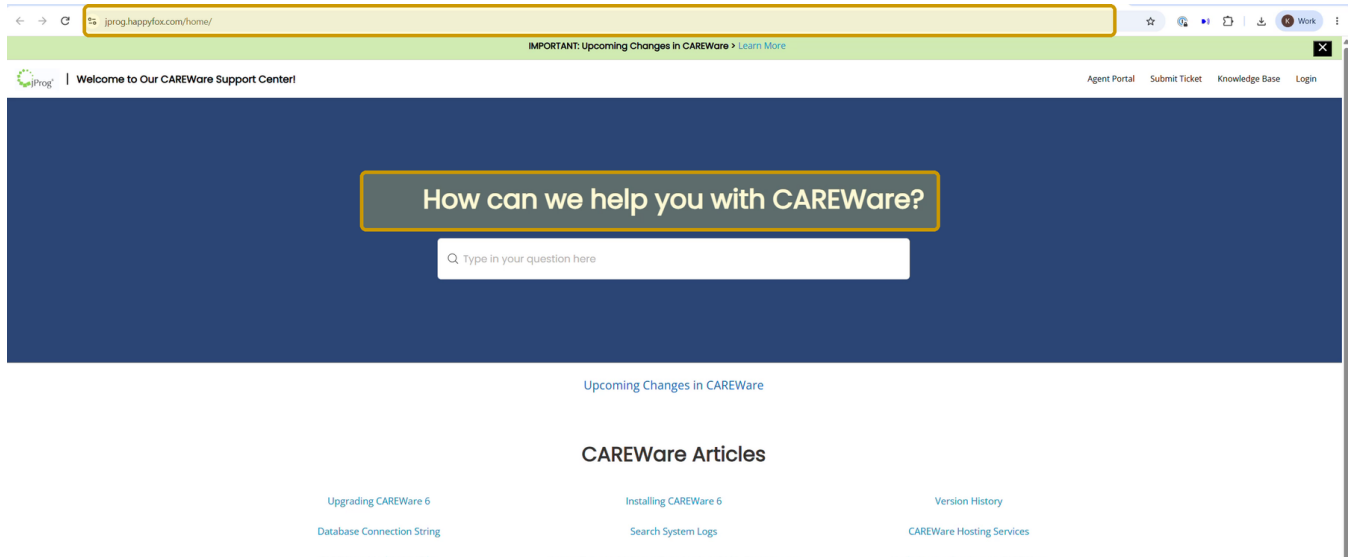
External Links

Cancel

External Links

- Main Menu FAQ Link
Link to FAQ Open >

Step 14. Confirm that the intended destination opens.



Main Menu External Links buttons

Button	What it does	When to use it
View	Opens the selected link record.	Review an existing link before changing it.
Add	Creates a new external link.	Add an approved shared resource.
HTTP Fields	Opens the HTTP field settings for the selected link.	Use only when the destination requires an approved HTTP-field configuration.
Delete	Removes the selected link from the list.	Use only after confirming staff no longer need it.
Change Link Label	Changes the label shown for the selected link.	Refine the user-facing menu label without changing the destination.
Back	Returns to Custom Feature Setup.	Leave the Main Menu External Links list.
Print or Export	Prints or exports the grid.	Document or review configured links.
Column visibility	Shows or hides optional columns.	Simplify the list or display more details.

Important Deleting or renaming a shared link can disrupt staff workflows. Confirm ownership, communicate the change, and test the updated menu before release.

How to confirm it worked

- The link appears in the Main Menu External Links list with the correct text, description, and URL.
- External Links appears in the provider menu for an intended user role.
- The new link appears in the External Links list.
- Selecting the link opens the approved destination without an error or unexpected redirect.
- The link remains available after signing out and returning to the provider.

Helpful tips for reliable main menu links

Topic	Recommended practice
Link text	Use a concise, durable label that clearly identifies the destination.
Description	Explain what the site provides and why staff may need it.
URL	Enter the complete address with lowercase http:// or https://; prefer HTTPS.
Security	Do not include credentials, tokens, client identifiers, or other sensitive values.
Testing	Open the destination before release and retest after any change.
Visibility	Review Menu Item Customization and user permissions when access should differ by role.
Change management	Document the link owner, approval, activation date, and future changes.

Important

Changes that appear cosmetic, such as renaming a link, can affect training materials, instructions, and staff workflows. Coordinate and test changes before release.

Troubleshooting and common questions

Why can't I see Main Menu Link Management?

Confirm that the account can access Central Administration, Administrative Options, and Custom Features. Ask a local administrator to review the applicable permissions.

Why does Save fail?

Complete Link Text, Description, and URL. Verify the URL begins with http:// or https://, remove leading spaces, and review any validation message beside the field.

Why doesn't External Links appear in the provider menu?

Confirm the link was saved, refresh the provider session, and review Menu Item Customization and the user's permissions.

Why doesn't the link open?

Open the URL directly in a browser, check for typing errors or an unavailable destination, and confirm the site does not require unsupported or expired access information.

Why do users see an outdated label?

Return to Main Menu Link Management, select the link, update the label or details, save, and refresh the provider session.

Related CAREWare guides and resources

Resource	How it helps
My Links	Set up and open shared external links from the CAREWare main menu.
Menu Item Customization	Control which menu items are visible for users and groups.
Provider User Manager	Review user access, provider assignments, and permissions.
Manage User Groups	Manage permission sets for users who perform similar roles.
Custom Control Setup	Review URL safety, naming, testing, and change-management guidance.