Softopment

OnLine

Login

Introduction

To assist you in the performance of your job, the company has developed a special on-line program that can be used to register clients and to write and submit invoices for the work you performed. This document will provide you basic instructions that explain how to apply this on-line program in working with clients.

1

Login

Accessing the online program requires that you enter a URL address.

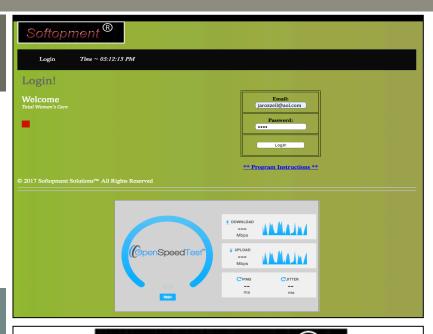
- → You must first type in https://drztotalwomens.care in your browser and then press the enter key.
- → This will take you to the login page as shown in the above image.
- → Now enter your email address and password that the company's IT issued you and click the Login button.

Welcome

Immediately after logging in, you will see a Welcome message displayed for about 15 seconds that describes the company's privacy requirements when using the online platform. Please read it carefully and comply with the policy.







Softopment ®

~~ Policy Notice ~~

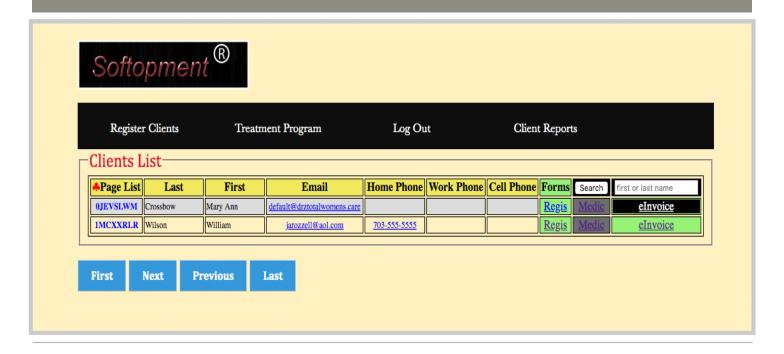
This on-line program contains private information that <u>MUST be protected</u> at all times from unauthorized disclosure of personal information during administrative use.

Any person who is permitted access to use this on-line software, he/she is held solely responsible to protect the security and confidentiality of the Clients' information as instructed by office's policy.

~~ 4 ~~

Welcome!

Clients List



After leaving the Welcome page, the display of the main page will appear next. This could be considered the hub of the web pages, referred as the Client List page as depicted above. Note the page's menu bar at the very top, its links that are shown with underlines, and its title bar that encompasses a yellow background. An explanation of their purpose is to follow:

MENU BAR

Register Clients – serves to launch the register form for entering information regarding new clients.

Treatment Program – presents a treatment list that involves the procedure for capturing and storing photo images of registered clients during the treatment phase.

Log Out - provides the link to exit the online program

Client Reports – displays a list of additional links that provide information in a report fashion of collected data pertaining to the clients.

TITLE BAR

Last, First, Email, Home Phone, Work Phone, Cell Phone, Forms, Search – primarily serves as headers within columns in presenting information in reference to the clients.

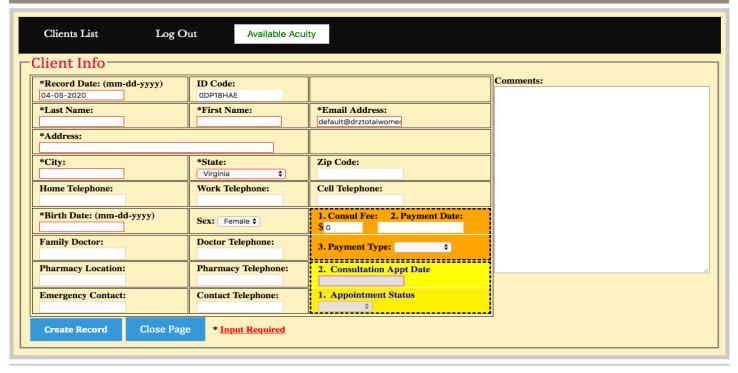
In addition, the "Forms" header lists links to the "Register Clients" webpage and the "Search" window, which permits the searching of clients by First or Last name.

LINKS

Regis – establishes links to the "Register Clients" webpage, whereby allowing the capability of updating and editing the client's previously recorded information

eInvoice – connects to links that launch the eInvoice WebPage.

Register Clients -Info



In reference to the main page and of the Menu Bar, a click of the 'Register Client' will lead to the opening of the 'Client Info' for entering client's information.

This page is structured into five major sections: Bio-Data, Consultation Fee, Consultation Appointment Date, Available Acuity and buttons.

Section I

Bio-Data – A newly created page will show empty fields and for some of them they must be filled in, such as the last name, first, and address as example. The fields, highlighted with red boxes, are designated as required fields that must be completed. Fields that are not highlighted are optional.

Section II

Consultation Fee – This particular section can be identified with the orange background. It provides the recording of the consultation fee received from a client. The fee amount, date paid, and type of payment are recorded in the database. Page 5 of the "Register Client-Payment" image gives you an expanded view of this section, which shows the pop-up calendar to select the date, and the PayPal pop-up for processing credit card payments.

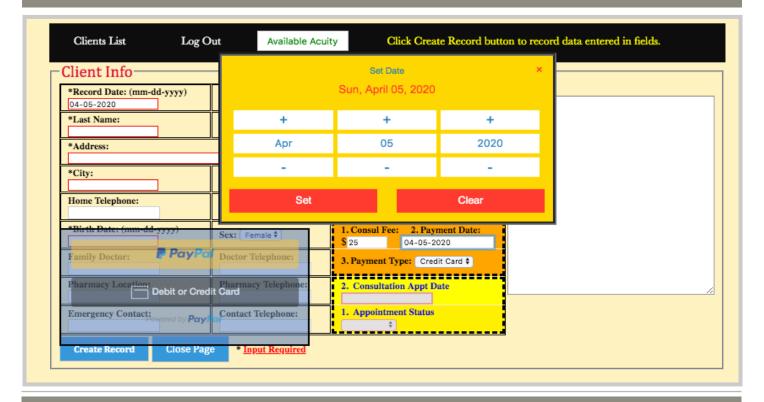
Section III

Consultation Appointment Date – This section is highlighted yellow and is used for scheduling the appointment date of a client. A special scheduling online program, called "Acuity Scheduling", manages the scheduling of clients for appointments. The clicking the above "Available Acuity" button will display a popup list of available dates for scheduling clients, as seen on Page 5 of "Register Client-Acuity" image. You note an available date, close the display by clicking "Close Acuity" button and then record it in the "Consultation Appt Date" field using the calendar dialog box. This final action will automatically update the Acuity program and send an email notice to the client of the appointed schedule.

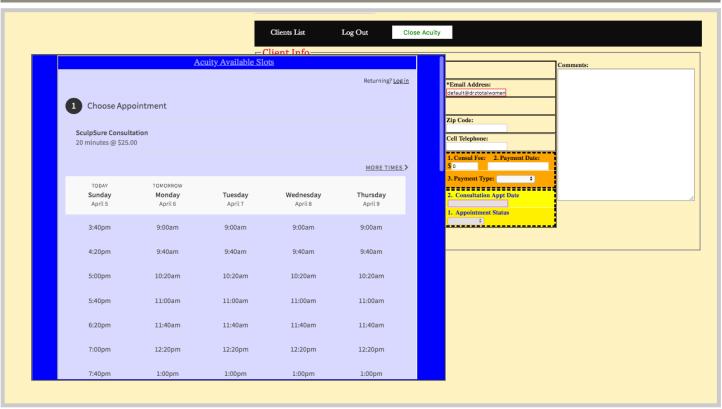
Section IV

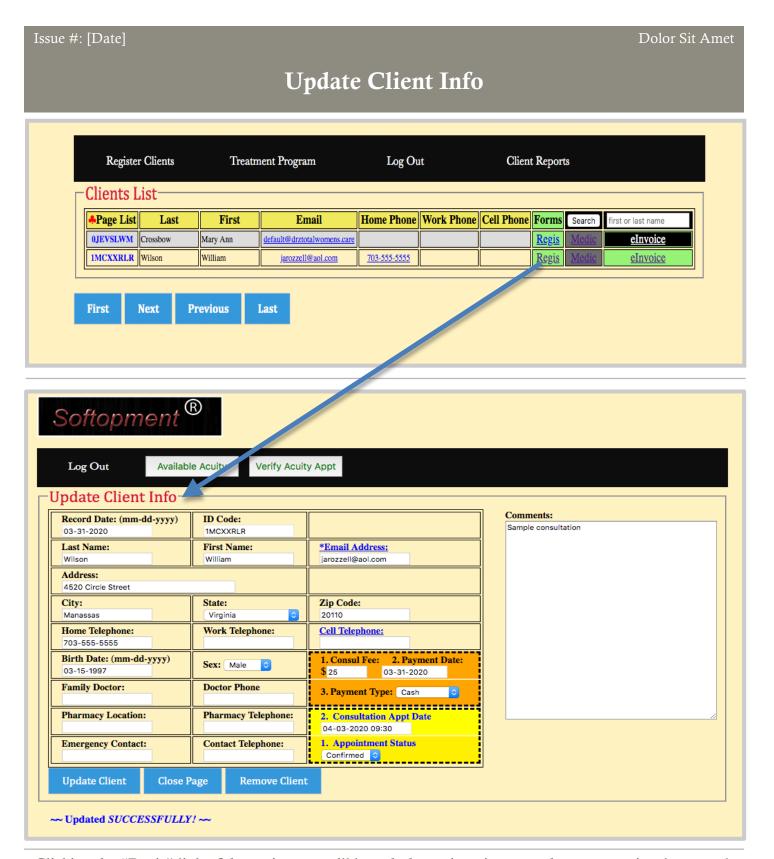
Buttons – The two bottom buttons, "Create Record" and "Close Page" are used to either record the data of the fields in the database or to simply close the page.

Register Clients -Payment



Register Clients –Acuity

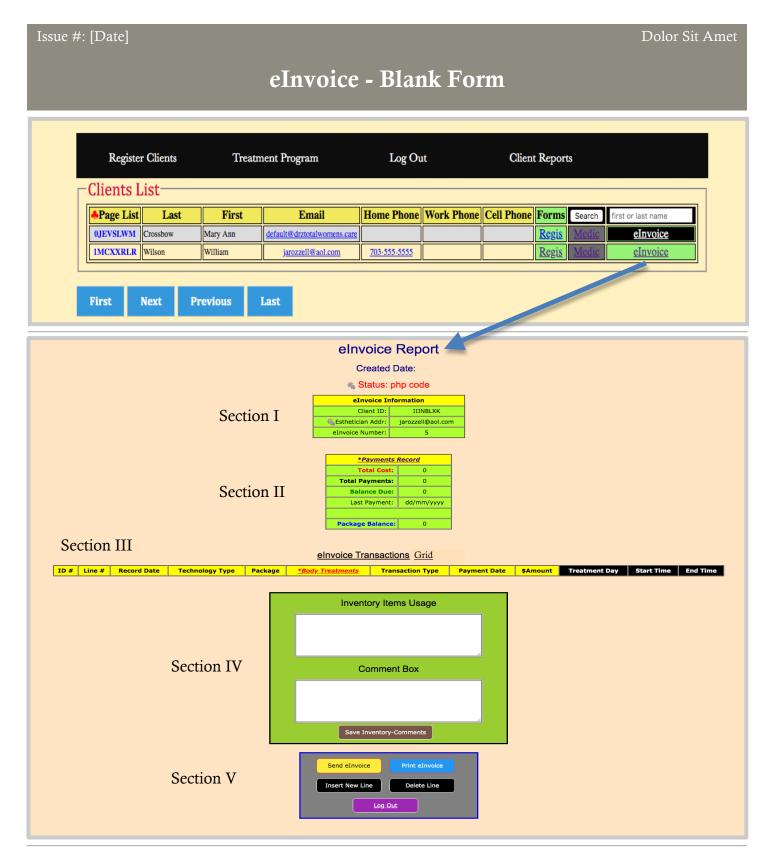




Clicking the "Regis" link of the main page will launch the registration page that was previously created but now you will be able to make any change that is required of a client's bio. This includes change in appointment date, such as rescheduling or cancellation.

Two additional buttons will also appear on the update page that can be used to remove or delete ("Remove Client") the client's registration page or to verify ("Verify Acuity Appt") the appointment of the Acuity Scheduling online program.

6

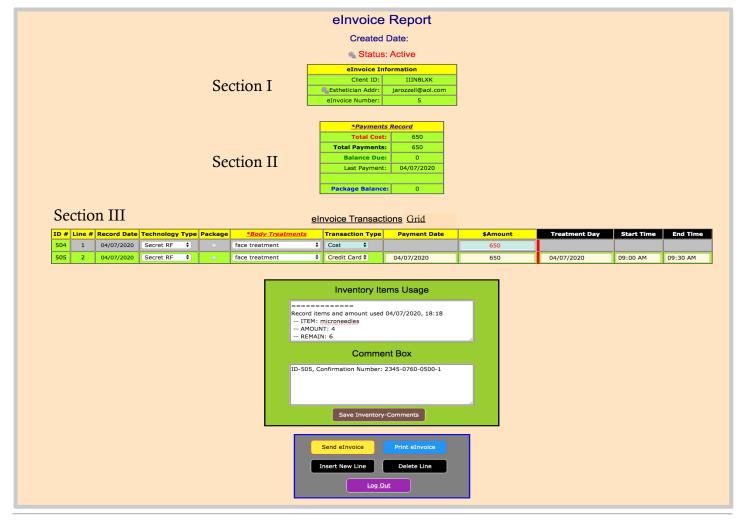


A discussion of the eInvoice page begins here.

A click of the "eInvoice" link of the main page will open the "eInvoice Report" webpage, only if you were the person who registered the client.

The eInvoice currently shown has no records and is laid out primarily in five sections: information (Section I), payments (Section II), listing (Section III), comments (Section IV) and buttons (Section V).

eInvoice - Single Treatment



To follow on as an extension of Page 7, an overview will be given of the five sections that include two sample records of a single treatment as an additive to broaden the description.

Section I

eInvoice Information – lists general information about the invoice that entails the client's ID number, the esthetician's email address and the invoice number of the page. A double-click of the "Esthetician Addr:" title with the mouse will open a dialog box, whereby allowing the client's eInvoice to be assigned to another esthetician.

Section II

Payment Record – gives an accumulative total cost, payments and balance of the client's treatment as listed in the records. A double click of the underlined "<u>Payments Record</u>" will display a PDF file that shows the IC compensation table.

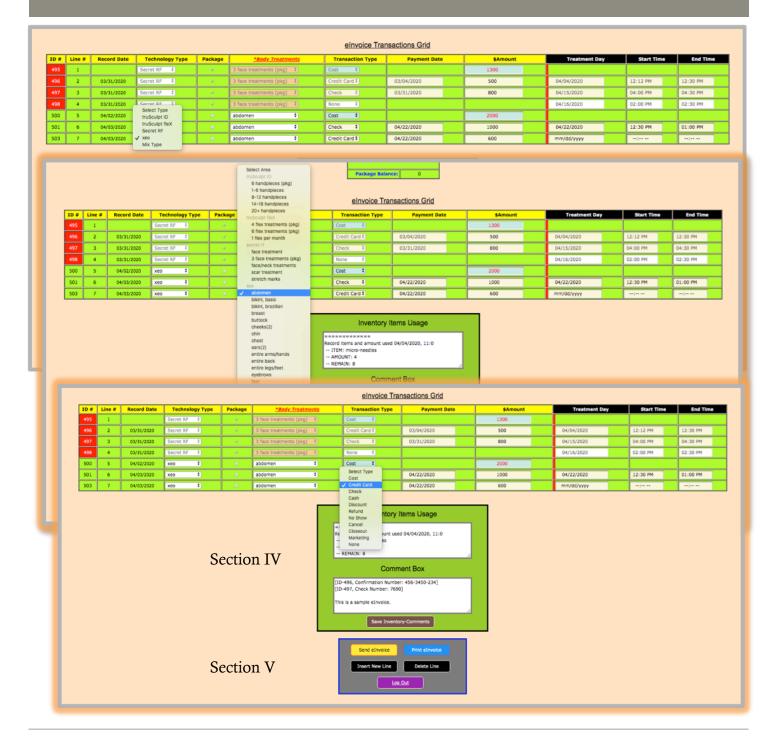
Section III

eInvoice Transaction Grid - This section of the webpage lists the specific treatments and payments being tracked of a client.

"Technology Type", "Package", "Body Treatments", "Transaction Type", "Payment Date", "Amount", "Treatment Day", "Start Time" and "End Time" are title headers of this section. Below it is recorded information about the treatments given to a client. Clicking twice the "*Body Treatments" title will open a PDF file that displays a complete table of available treatments and pricing.

Depicted in Section III is a simple example that shows the setup for a single treatment of a client. Line 1 illustrates the cost of treatment layout, and Line 2 records the payment transaction and the day and time of the treatment. Page 9 shows the pop-down list of the Technology Type, Body Treatments and Transaction Type.

eInvoice - Drop-down List



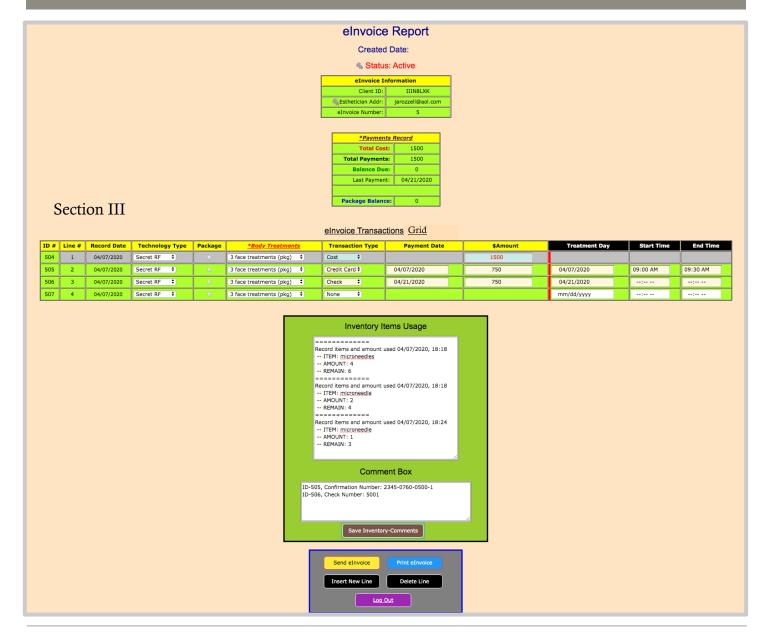
Section IV

Inventory Items Usage / Comment Box – allows space for commenting. The "Inventory Items Usage" is set aside to note items that were used for treatment of the clients and the "Comment Box" auto-transcribes the check number and the CC confirmation number when the clients make payments. Also this space is where you may write any general comments.

Section V

Send, Print, Insert & Delete Buttons – perform a specific task, such as, to email the eInvoice to the Coordinator for processing, to print a copy of the eInvoice, to insert a new line to the Transaction Grid or delete a line from the Transaction Grid. Lastly, clicking the "Log Out" button will close the webpage

eInvoice - Multi-treatments

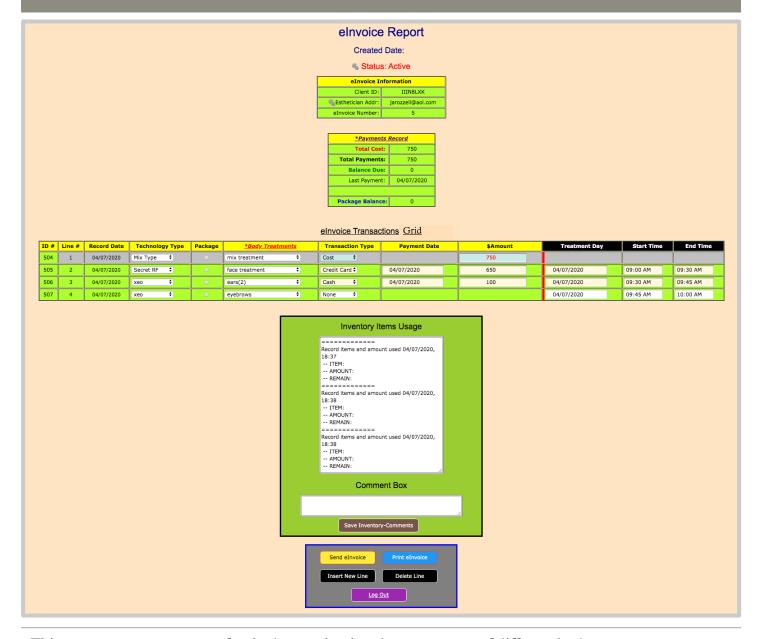


This page illustrates the steps in setting up a multi-treatment transaction. In this example, the "3 face treatments (pkg)" entail three of them and this will require the insert of four records as seen from Line 1 to Line 4 of the above Transaction Grid.

The first line of any initial treatment will always start with a "Transaction Type" of Cost and the remainders will cover the type, payment, and treatment day of each treatment that the client will experience.

Note how the Inventory and Comment boxes auto-record pertinent information in accordance with each of the individual treatment.

eInvoice - Mix Technology / Single Treatments



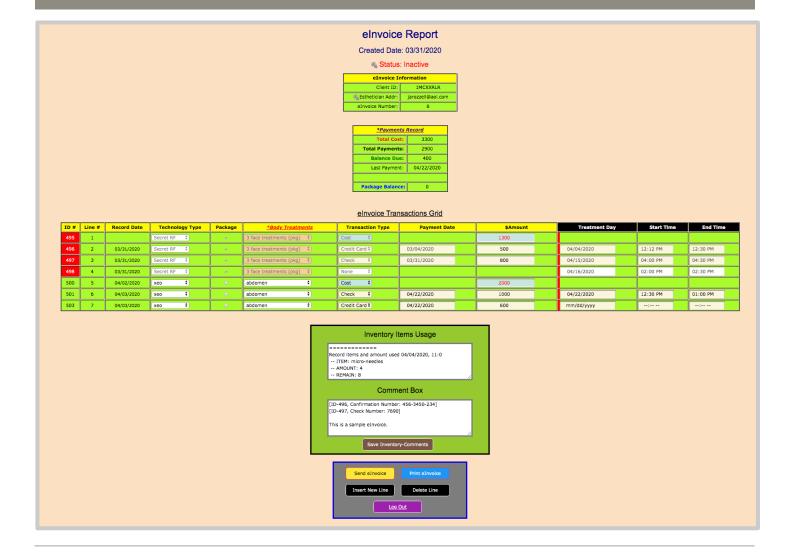
This page represents a case of a single cost that involves treatment of different body parts.

For such a situation like this, Line 1 is considered "<u>Mix Type</u>" and "<u>mix treatment</u>" under the heading of "<u>Technology Type</u>" and "<u>*Body Treatments</u>", respectively, in describing the Cost for a client's treatment.

Line 2, 3, and 4 illustrates the various body parts to be treated and their corresponding categories, such as, transaction, date, amount, etc.

Applying this particular outline of invoicing will provide exact information of a client's overall treatment plan and proper compensation to the IC.

eInvoice – Package Treatment & Locked Records

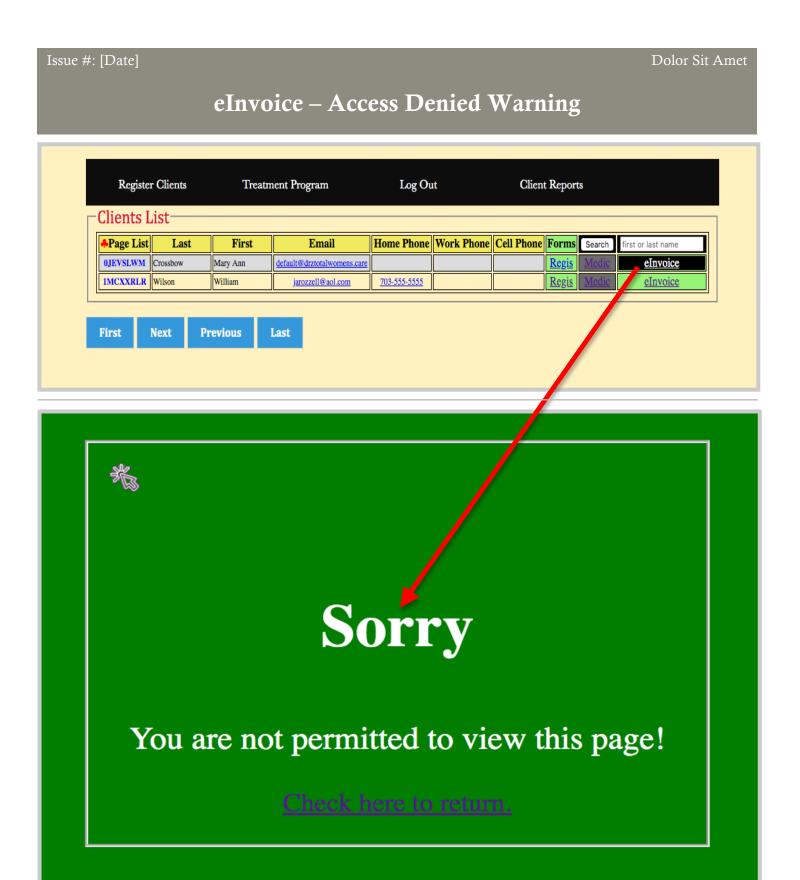


Package Treatment

There may be times that clients may purchase a package or bundle treatment. The Transaction Grid has a column (Package) to check when a treatment is a package deal. It is important that any package or bundle treatment is duly recorded of a client in order to determine bonuses for work performance.

Locked Records

Whenever the "Send eInvoice" button is clicked and the eInvoice is afterward processed, the records that have the red markings in the first column (ID#) will indicate they were reconciled by the Processor. In addition, these records will also be locked and cannot be altered, changed, modified or deleted.



If you attempt to open an eInvoice link that is not associated with your email address assigned to your client, then the above webpage message will appear denying you access to view it.

Page Examples

eInvoice Page

10 9

04/08/2020 04/08/2020

> truSculpt fleX\$ xeo xeo xeo

truSculpt fleX‡

truSculpt fleX‡

Esthetician Addr:

jarozzell@aol.com

1MCXXRLR

Created Date: 03/31/2020 elnvoice Report

Status: Active

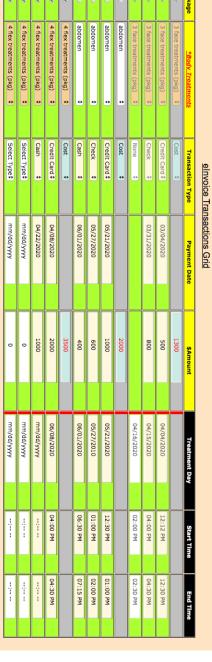
Not Yet Processed: 4	eInvoice Total: 1	Package Balance:	Last Payment: 06/0	Balance Due:	Total Payments: 6	Total Cost: 6	*Payments Record	
4000	1300	500	06/01/2020	500	6300	6800		



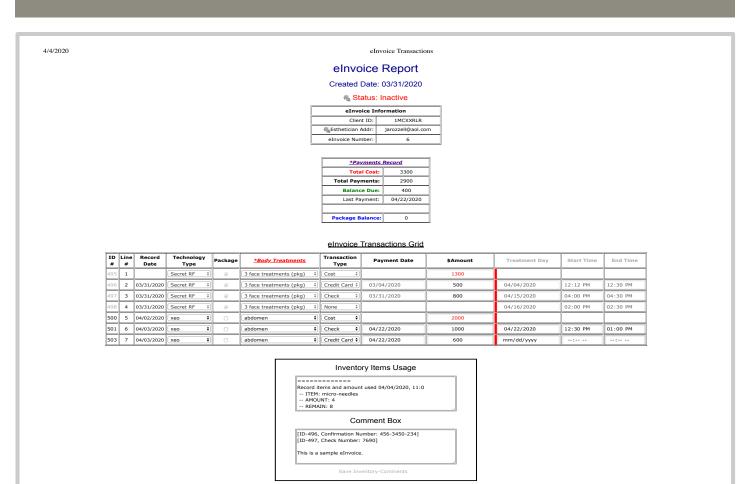
ID-496, Confirmation Number: 456-3450-234 ID-497, Check Number: 7569 ID-501, Confirmation Number: 234-3456-9885-001 ID-503, Check Number: 9768 ID-509, Confirmation Number: 3456-0593-2134

Comment Box

Inventory Items Usage

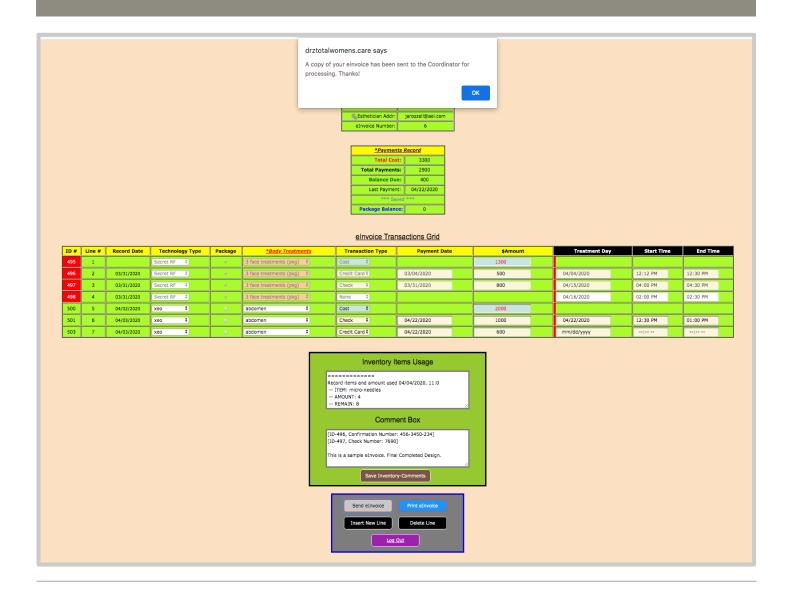


eInvoice Printout Button



1/2

eInvoice Send Button



Sent Email Message

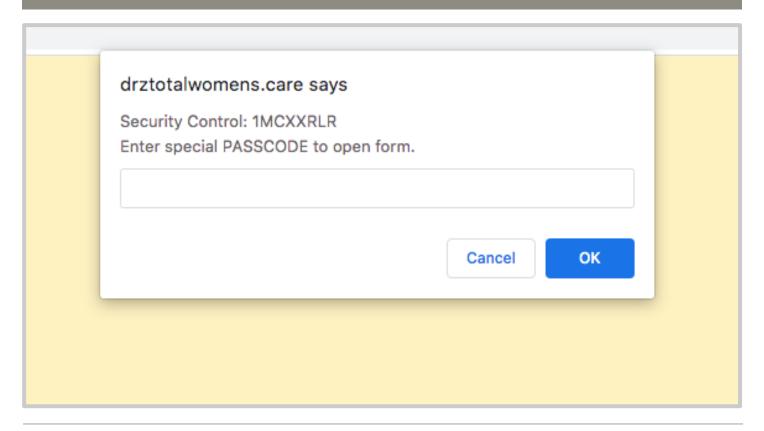
jarozzell@p3plcpnl0580.prod.phx3.secureserver.net

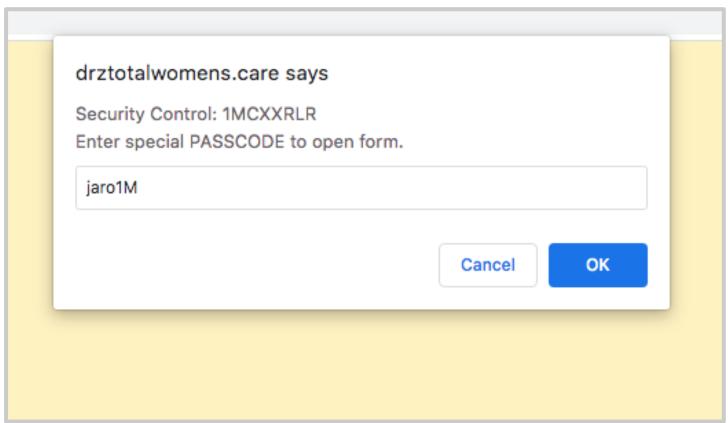
elnvoice Notice - Record ID: 6, Date: 04/04/2020

To: webmaster@drztotalwomens.care, coordinator@drztotalwomens.care & 2 more

You have received an elnvoice notice from jarozzell@aol.com. Go on-line by opening the link at https://drztotalwomens.care/invoiceKey.php. Apply the provided pin number(10725) in order to view it. Please note, accessing the elnvoice is only available for seven days from the date sent, 04/04/2020.

Security Control Dialog Box





Acuity Scheduling Confirmation Window

