

Admin Dynamic Email Section

Reminder for Booking Appointments (set to 24 hours)

Email for the user, registration confirmation welcome email.

Email for the homeopaths, sent after registration.

Add "Subject Line" for the email, "Paragraph".

Add "Add Signature" Functionality to the description box.

Add hyperlink options, images, and signature.

Zoom

How do the users connect their zoom account?

How do homeopaths connect to the zoom account as well?

Homepage

On the top of the homepage, "Registration" will be changed to "Subscription", the user will only have two options "Homeopath" or "Advocate". Let's say they click on the Advocate option, this will lead into the informational Advocate Page.

Register



Register me as:

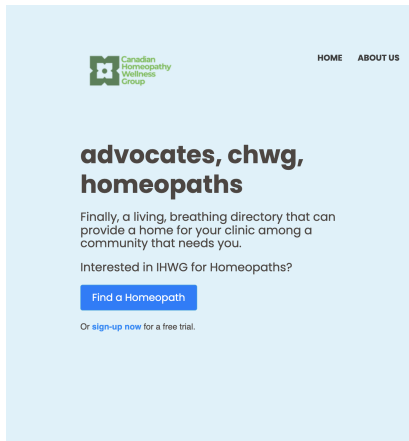


Homeopath



End User

On the "Advocates Page" remove "Find a homeopath" replace with, "Start Your Subscription Today."



When the user clicks on sign up now, it will lead into a boxed form to enter their name, email, and password.

Admin Backend

Finance Setting, what is this for? Depending on the location taxes will vary for the homeopaths.

Homeopaths/Advocates Social Platform

For example, when posting an Article, the article will be available in the Article Section where the user can access the specified information. However, all posts will be available on the “Home Feed” as well where all can view and access it as well, like Facebook but we can categorize the location of where these resources will be placed.

Homeopath Backend

When entering the resources section instead of having two options “New Resource” & “Upload” there will only be one option “New Resource” upon selecting and entering this, the homeopath will be able to have access to “Upload” internal to this section.

When entering the Dashboard, logged in as Homeopath Add Another Icon @ top called MyClinic.

There will be 3 Icons at the top; Dashboard, MyClinic, Social Platform.

When we click on “MyClinic” icon, this will visually expand and reveal drop down menu:

“Services, Settings, Resources, Finance, Documents, Customers, Appointments, Calendar”

ref link

<https://raouloppenheim.wixsite.com/my-site/crm>

For the Customers Section, here is the reference:

for this no need to have status as its only customer database

No #.	Name	Phone #.	Patient Email	Address	Status
0010	Angela Barbudo	64768889	myrtie.j@gmail.co	25 Boobo Ave.	Completed
0029	Kyril Chapalova	416776654	jackson.w@gmail.c	3 Acorn St.	Approved
0008	Anna Cragaro	28998222	andreacc@gmail.c	Reiki Service	Cancelled
0007	James Deloitte	432564121	andreacc@gmail.c	Reiki Service	Completed
0006	Hilary Hawthorne	876564321	andreacc@gmail.c	Initial Consultation	Completed
0005	Gregory Jin	90567544	andreacc@gmail.c	Information Session	Approved
0004	Sumadaran Jinpara	64755423	andreacc@gmail.c	Acute Consultation	Completed
0003	Bellator Davis	416667664	andreacc@gmail.c	Follow-up Consultation	Cancelled
0002	Baldie Newman	416002334	andreacc@gmail.c	Reiki Service	Completed
0001	Bright Calamariana	90564522	andreacc@gmail.c	Reiki Service	Completed

No #.	Name	Phone #.	Patient Email	Address	Status
0010	Angela Barbudo	64768889	myrtie.j@gmail.co	25 Boobo Ave.	Completed
0029	Kyril Chapalova	416776654	jackson.w@gmail.c	3 Acorn St.	Approved
0008	Anna Cragaro	28998222	andreacc@gmail.c	Reiki Service	Cancelled
0007	James Deloitte	432564121	andreacc@gmail.c	Reiki Service	Completed
0006	Hilary Hawthorne	876564321	andreacc@gmail.c	Initial Consultation	Completed
0005	Gregory Jin	90567544	andreacc@gmail.c	Information Session	Approved
0004	Sumadaran Jinpara	64755423	andreacc@gmail.c	Acute Consultation	Completed
0003	Bellator Davis	416667664	andreacc@gmail.c	Follow-up Consultation	Cancelled
0002	Baldie Newman	416002334	andreacc@gmail.c	Reiki Service	Completed
0001	Bright Calamariana	90564522	andreacc@gmail.c	Reiki Service	Completed

Abigail Lovedrip
647892201
abigail.love2@gmail.co

22 Innigale Dr.
Woodbridge, ON
L3T5E5

Upcoming Appointment: appointment pending
Last Appointment: Thursday, May 06, 2020 (Acute Consultation)

Send a file Send an email

For the Appointment Section:

The screenshot displays the 'Appointment' section of a web application. On the left is a sidebar with navigation links: Calendar, Appointments, Services, Customers, Business, Documents, and Settings. The main content area has filters for 'June 01, 2021 - July 01, 2021', 'Patient', and 'Service'. Below these is a search bar and a table of appointments.

No #.	Appointment Date	Patient	Patient Email	Services	Status
0009	June 14, 2021 11:00AM	Jackson Wu	jackson.w@gmail.com	Acute Consultation	Approved
0008	June 14, 2021 2:00PM	Andrea Colt..	andreacc@gmail.com	Reiki Service	Cancelled
0007	June 12, 2021 2:00PM	Joseph Multi..	andreacc@gmail.com	Reiki Service	Pending
0006	June 11, 2021 2:00PM	Barbara Ke...	andreacc@gmail.com	Initial Consultation	Completed
0005	June 19, 2021 3:00PM	Andrea Colt..	andreacc@gmail.com	Information Session	Approved
0004	June 11, 2021	Andrea	andreacc@gmail.c	Acute Consultation	Completed

A modal window titled 'Appointment Information:' is open, showing details for a specific appointment:

- Appointment Date:** Thursday May 6, 2020
- Appointment Time:** 12:30PM (EST)
- Patient:** Abigail Lovedrip
- Type of Service booked:** Initial Consultation
- Additional Information:** Over 10 (age)
- Appointment Status:** PENDING (with 'Approve' and 'Cancel' buttons)

For the document section:

The screenshot displays the 'Documents' section of the web application. The sidebar is the same as in the previous section. The main content area has a filter for 'Health Forms' and a search bar. Below is a table listing various health forms.

Title	File	Date Posted	Last Edited
Adult Health in-take Form	adultintakeform.pdf	August 02, 2021	August 23, 2021
Child Health in-take Form	ChildHealthInTakeForm.pdf	August 05, 2021	August 12, 2021
Standard Permission Fo...	STA_PermissionForm.pdf	August 05, 2021	August 12, 2021
Research Permission F...	ResearchPerm.pdf	August 05, 2021	August 12, 2021
Information in-take Fo...	InformationForm.pdf	August 05, 2021	August 12, 2021

For the calendar section:

The screenshot shows a web application interface for a calendar section. On the left is a vertical sidebar with blue buttons and icons for: Calendar, Appointments, Services, Customers, Business, Documents, and Settings. The main content area has a light gray header with three filters: a date range 'June 01, 2021 - July 01, 2021', a 'Patient' dropdown, and a 'Service' dropdown. Below the header is a 'Theme' section with a search bar and a large white box labeled 'Select theme'.

Thank you team.