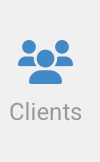
Clients Module

November 28th, 2023

There are two distinct types of clients: **Individuals and Groups**. Individuals refer to individual customers, as well as families or retail customers. On the other hand, Groups comprise employers, companies, or associations.

This module has information about clients, groups, and their dependent/group members with options to view membership information and status. As a client, you can edit your, your group members, and dependents’ information, buy additional services and manage dependents/group members.

# How To

## [Edit client details](#gn3tms6kccjw)

## [Buy more](#35r89gl85o31)

## [Add dependent](#qb8nc667p5eu)

## [Add Group member](#6oat5jldnjuu)

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## [Remove dependent](#kix.t63lbhox1q86)

## [What is client status](#df7h0wmm3693)

**Edit profile:** Goto Ellipsis ⋮ > Edit profile

In the edit profile section, you have the ability to modify various client information including address, phone number, email, tags, and add notes. It also allows you to view the existing membership status (if applicable), update billing details, and upload any relevant files for that specific client.

**Buy Membership:** Use the “Buy membership” button on the top bar OR Goto Ellipses ⋮ > Buy Membership

You can view existing active/inactive memberships using the dropdown on the top right. To add to your existing membership, use the +Add button on the top right. You can choose which membership you would like to add from the options listed along with the start date of when you would like for it to begin.

**Add Dependent (optional - permission required):**

A dependent is an individual associated with the primary or main contact, which can include a spouse, child, or any other person connected to the primary client.

Goto Ellipses ⋮ > Add Dependent

* The form will default to Dependent
* Complete the form including:
  + Personal information
  + Bundle
  + Billing
  + Files
* Members can now be seen by clicking the + to the left of the primary member’s name. (Click the - to shrink back to group).
* NOTE: Group members may also add dependents.

**Add someone to a Group**

An individual that is associated with the group or company that takes part in your company.

Goto Ellipses > Add Member

* The form will default to Group Member
* Complete the form including:
  + Personal information
  + Bundle
  + Billing
  + Files
* Members can now be seen by clicking the + to the left of the group name. (Click the - to shrink back to group).

**Dependent/Group member Login:** Goto Ellipses > Send Invite

Dependents and group members can set up a login as well. As a primary member/group admin, you can send login invites to your dependents/group members.

To permanently **remove a dependent** please contact support@vitafyhealth.com

**Client status meaning**

* **Submitted**
  + The initial status when a client is created is referred to as the "First Status." This status can be completely customized and altered as per your requirements.
* **Approved**
  + A fully executed client refers to an individual who has completed all necessary steps, including signing documents, making payments, and filling out all required forms. Such clients meet the eligibility criteria and qualify to avail themselves of your services.
* **Canceled** 
  + A client who chooses not to renew their membership ahead of time or a client for whom you no longer wish to offer services.
* **Declined**
  + A client who wishes to terminate their current membership or does not desire to continue with their existing membership.
* **Active**
  + A client who currently holds an active membership Their membership could be canceled, but the end date is in the future.
* **Inactive**
  + A client without an active membership, including any prior enrollments that are no longer active.

NOTE: If there are any missing items or if you require access to something mentioned above, please feel free to contact Vitafy support at support@vitafyhealth.com for any inquiries.