Volume
2

MY VITALITY

Alternative Healthcare Solutions

System User Manual

MY VITALITY: ALTERNATIVE HEALTHCARE SOLUTIONS

System User Manual: Administration

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Chapter

1

How do I navigate the site?

To navigate MyVitality, there are two options:

1) Navigate to the menu at the top of the page and click one of the menu options.

Figure 1

2) The administration site home page contains three icons that may be clicked to take you to a different section of the site.

Hover over any of the light blue icons circled in red (see Figure 2) and when the icon changes to orange it may be clicked.

Figure 2

How do I view management information reports?

To view management information reports, you must navigate to the Management Information System reporting section of the system. To do that, you use the navigation bar at the top of the web page and click on the menu option 'MIS' (marked in red, see Figure 3).

Once you are directed to the MIS dashboard you can view a variety of reports. Each report has an option to click on a link so that you can view historical data. For more information on the type of reports or the structure of the MIS dashboard, refer to the section titled 'How do I view management information reports?'.

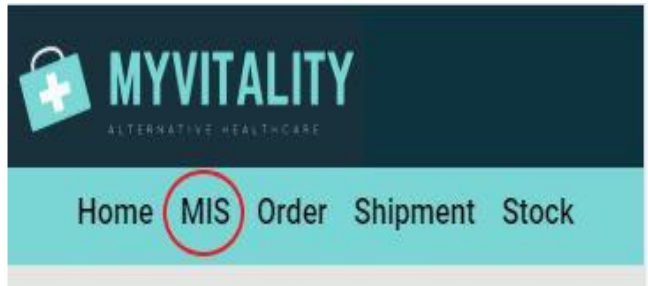


Figure 3

What management information reports are available?

The MIS reports cover the following categories of information:

- Finance (marked in red, see Figure 4)
    - Total Profit (marked in red, see Figure 5)
        - In last month
        - Link to historical data
    - Total Tax (marked in green, see Figure 5)
        - In last month
        - Link to historical data
    - Total Sales (marked in blue, see Figure 5)
        - In last month
        - Link to historical data
    - Average Order Amount (marked in orange, see Figure 5)
        - In last month
        - Link to historical data
- Orders (marked in green, see Figure 4)

- Number of orders (marked in red, see Figure 6)
    - In last month
    - Link to historical data
- Number of cancelled orders (marked in green, see Figure 6)
    - In last month
    - Link to historical data
- Number of pending orders (marked in blue, see Figure 6)
    - Current orders that are pending approval
    - Link to Invoice numbers pending approval
- Number of orders waiting to be shipped (marked in orange, see Figure 6)
    - Current orders that are waiting to be shipped
    - Link to Invoice numbers waiting to be shipped

- Inventory (marked in orange, see Figure 4)
    - Number of items that need to be re-ordered (marked in red, see Figure 7)
        - Link to Supplement IDs
    - Number of items that are within 10% of the re-order level (marked in green, see Figure 7)
        - Link to Supplement IDs
    - Number of items that were not ordered in the last month (marked in blue, see Figure 7)
        - Link to Supplement IDs
    - Number of items that were not ordered in the last year (marked in orange, see Figure 7)
        - Link to Supplement IDs
- Pricing (marked in purple, see Figure 4)
    - The lowest profit margin placed on a Supplement (marked in red, see Figure 8)
        - Link to Supplement IDs
    - The highest profit margin placed on a supplement (marked in green, see Figure 8)

        - Link to Supplement IDs

- Sales (marked in yellow, see Figure 4)
    - Breakdown of sales made by supplier in the last month (marked in red, see Figure 9)
        - Link to supplements sold by supplier, all time
    - Breakdown of orders per region in the last month (marked in green, see Figure 9)
        - Link to supplements sold by region, all time
    - A list of the top ten supplements sold in the last month (marked in blue, see Figure 10)
        - Link to the top ten supplements sold, all time
    - Breakdown of how customers were referred to the company in the last month (marked in orange, see Figure 11)
        - Link to how customers were referred to the company, all time

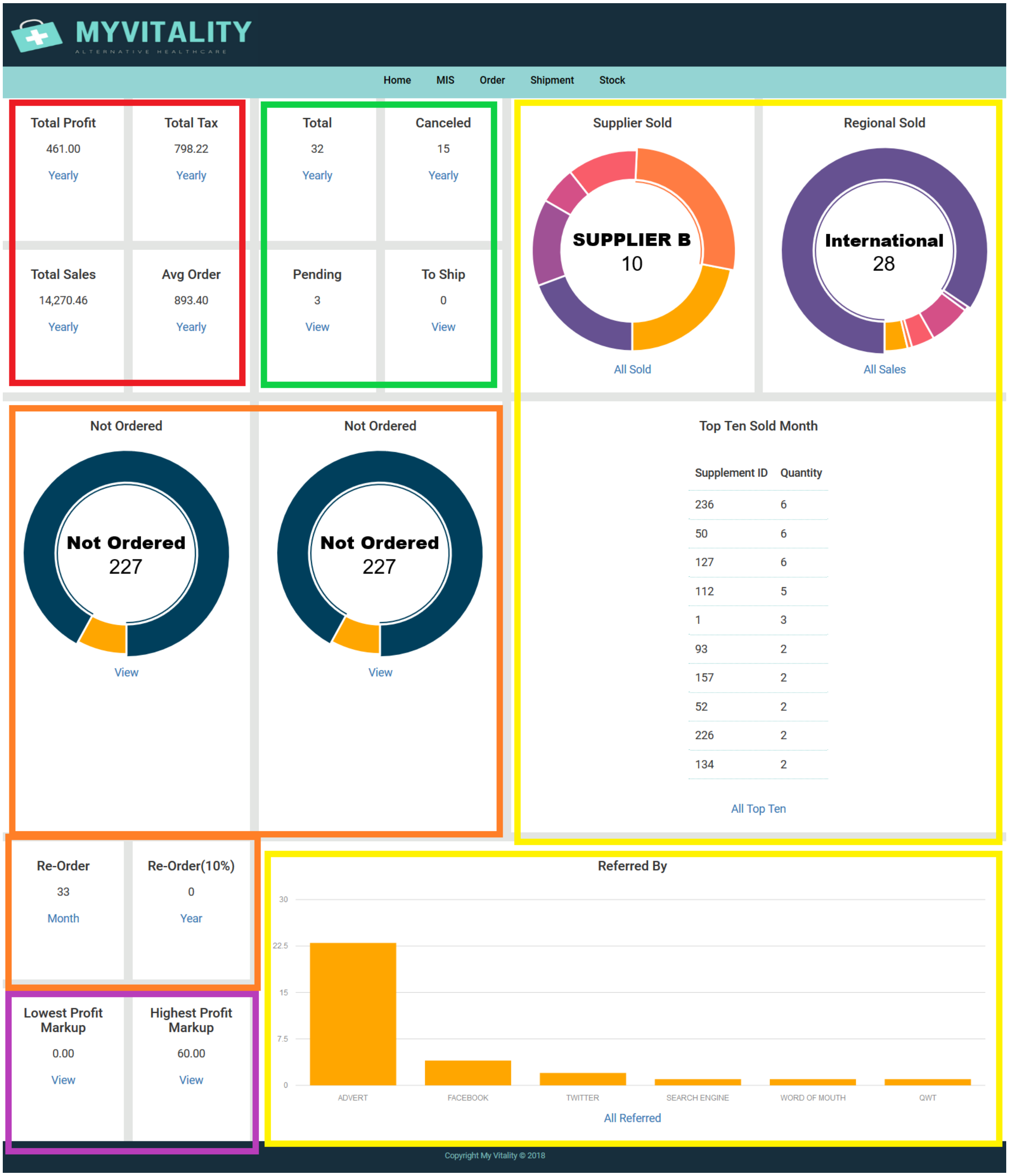

MYVITALITY
ALTERNATIVE HEALTHCARE
Home MIS Order Shipment Stock
Total Profit
461.00
Yearly
Total Tax
798.22
Yearly
Total
32
Yearly
Canceled
15
Yearly
Supplier Sold
SUPPLIER B
10
All Sold
Regional Sold
International
28
All Sales
Total Sales
14,270.46
Yearly
Avg Order
893.40
Yearly
Pending
3
View
To Ship
0
View
Not Ordered
Not Ordered
227
View
Not Ordered
Not Ordered
227
View
Top Ten Sold Month
Supplement ID Quantity
236 6
50 6
127 6
112 5
1 3
93 2
157 2
52 2
226 2
134 2
All Top Ten
Re-Order
33
Month
Re-Order(10%)
0
Year
Referred By
30
22.5
15
7.5
0
ADVERT
FACEBOOK
TWITTER
SEARCH ENGINE
WORD OF MOUTH
QWT
All Referred
Lowest Profit Markup
0.00
View
Highest Profit Markup
60.00
View
Copyright My Vitality © 2018

Figure 4

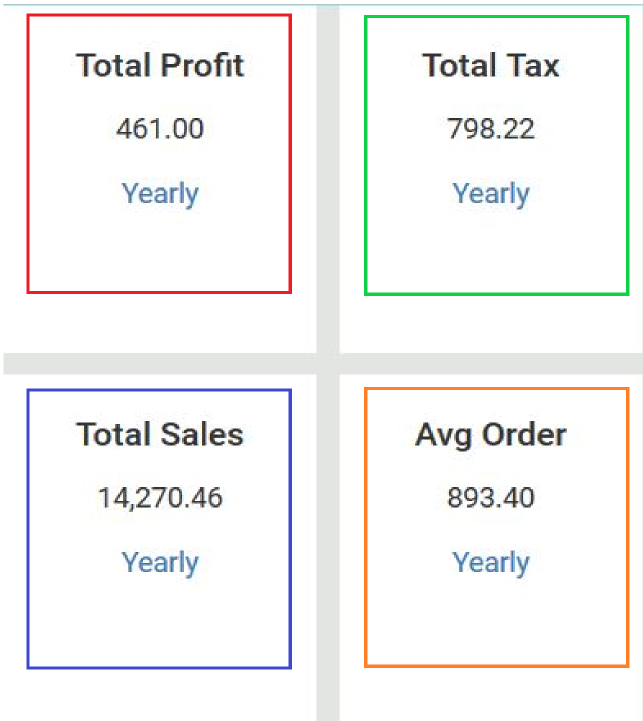


Figure 5

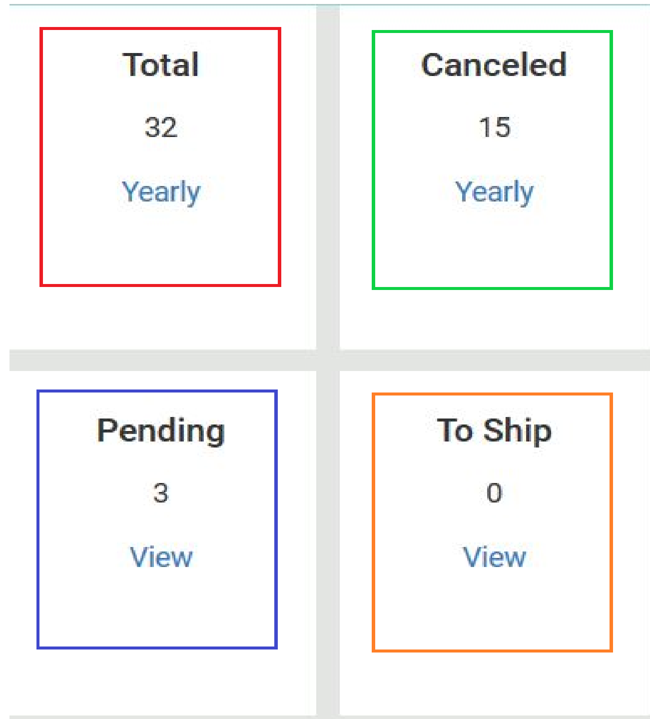


Figure 6

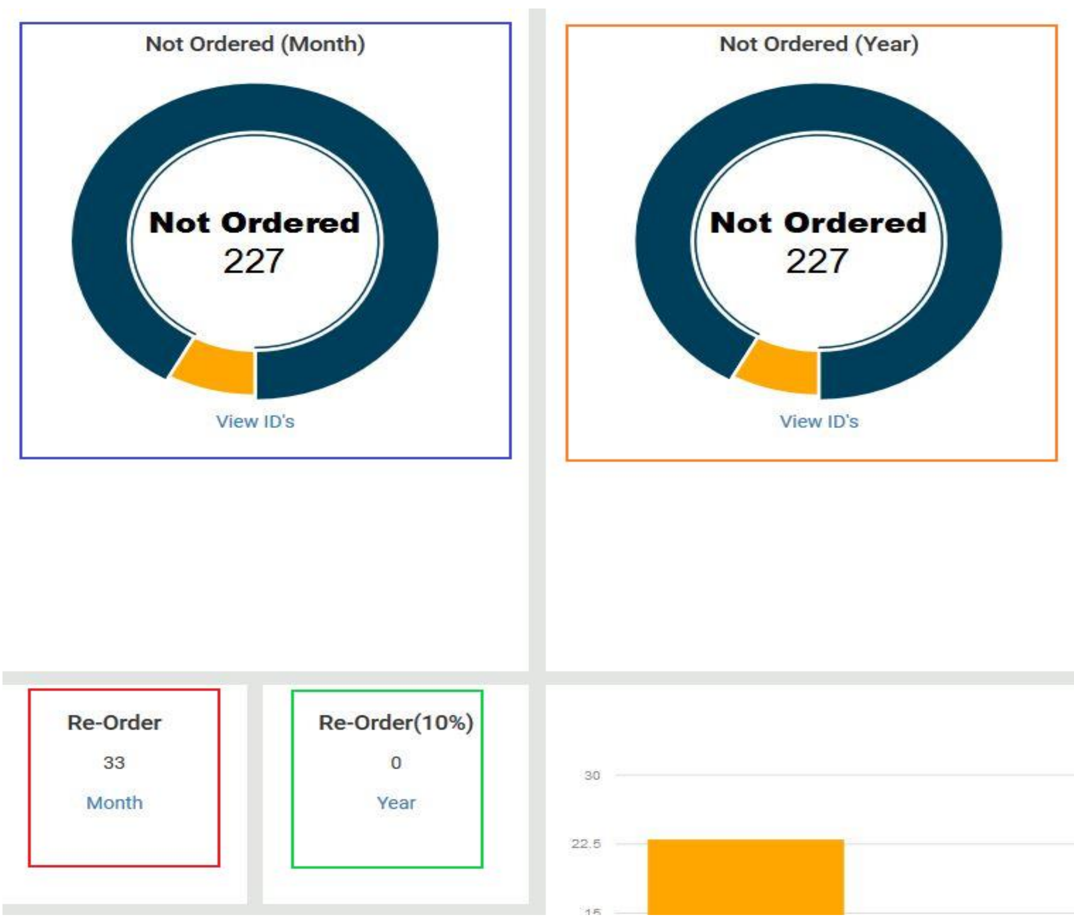


Figure 7

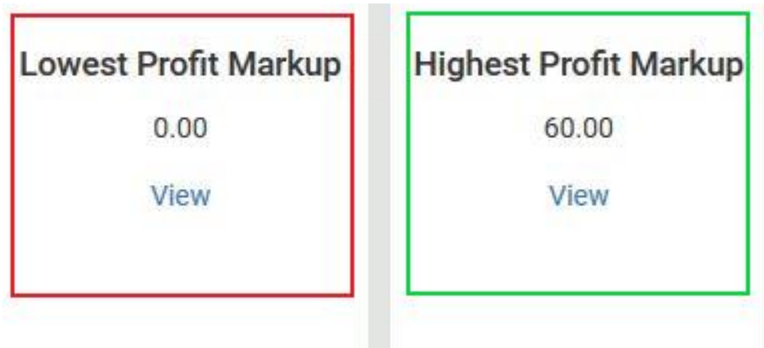


Figure 8

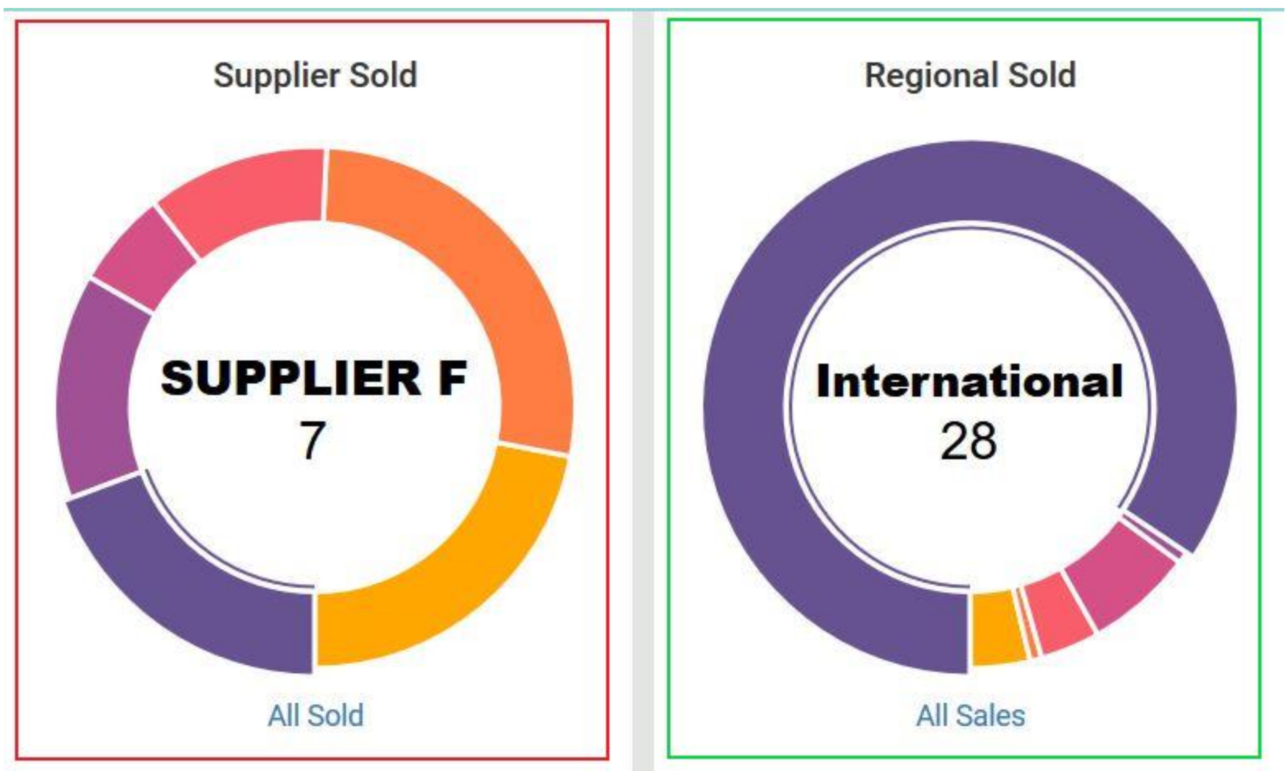


Figure 9

Top Ten Sold Month

Supplement ID	Quantity
236	6
50	6
127	6
112	5
1	3
93	2
157	2
52	2
226	2
134	2

All Top Ten

Figure 10

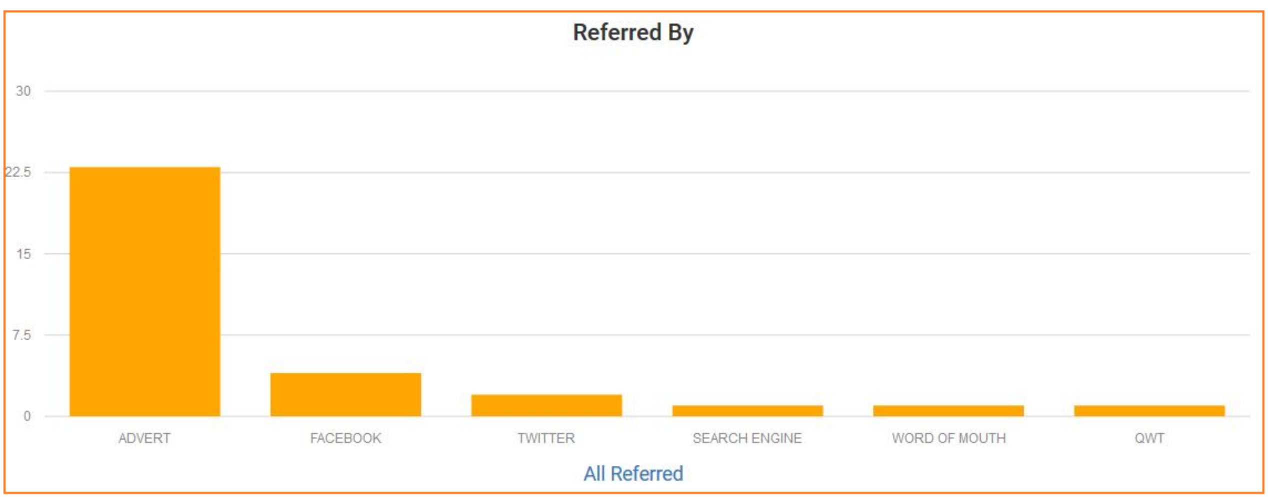


Figure 11

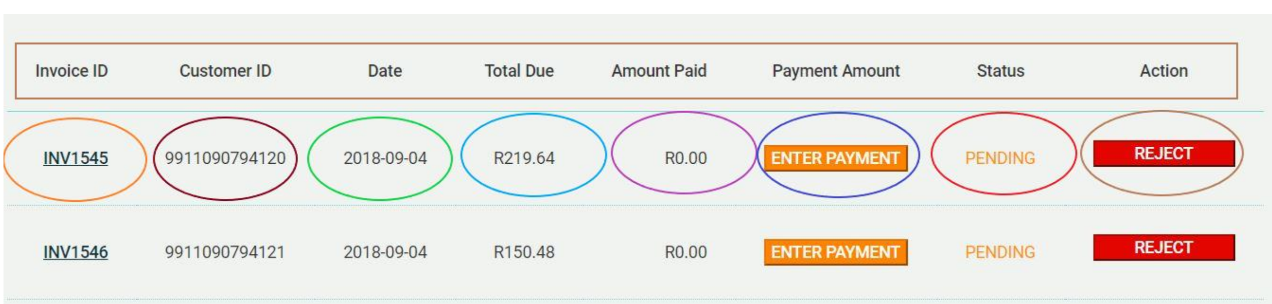
How do I view pending transactions?

To view pending transactions, navigate to the Orders section of the system. To do that, use the navigation bar at the top of the web page and click on the menu option 'Order' (marked in red, see Figure 12).

Figure 12

You will be directed to the 'Pending Orders' page. A variety of information about pending transactions will be displayed:

- Table headings (marked in brown, see Figure 13)
- Invoice ID (marked in orange, see Figure 13). The invoice ID is clickable. When clicked, the contents of the invoice will appear in a pop-up box (marked in red, see Figure 14)
- Customer ID associated with a specific invoice (marked in dark red, see Figure 13)
- Date the invoice was generated (marked in green, see Figure 13)
- Total amount due by the customer (marked in light blue, see Figure 13)
- Amount that has been paid by the customer (marked in purple, see Figure 13)
- 'ENTER PAYMENT' button. The button can be clicked to open a pop-up box where the user can enter a customer's payment. See the section titled 'How do I confirm a customer's payment?' for more information.
- The status of an order (marked in red, see Figure 13). For more information on status indicators, see the section titled 'What do the status indicators mean?'.
- 'REJECT' button. The button can be clicked to reject an order (marked in brown, see Figure 13)



Invoice ID	Customer ID	Date	Total Due	Amount Paid	Payment Amount	Status	Action
INV1545	9911090794120	2018-09-04	R219.64	R0.00	ENTER PAYMENT	PENDING	REJECT
INV1546	9911090794121	2018-09-04	R150.48	R0.00	ENTER PAYMENT	PENDING	REJECT

Figure 13

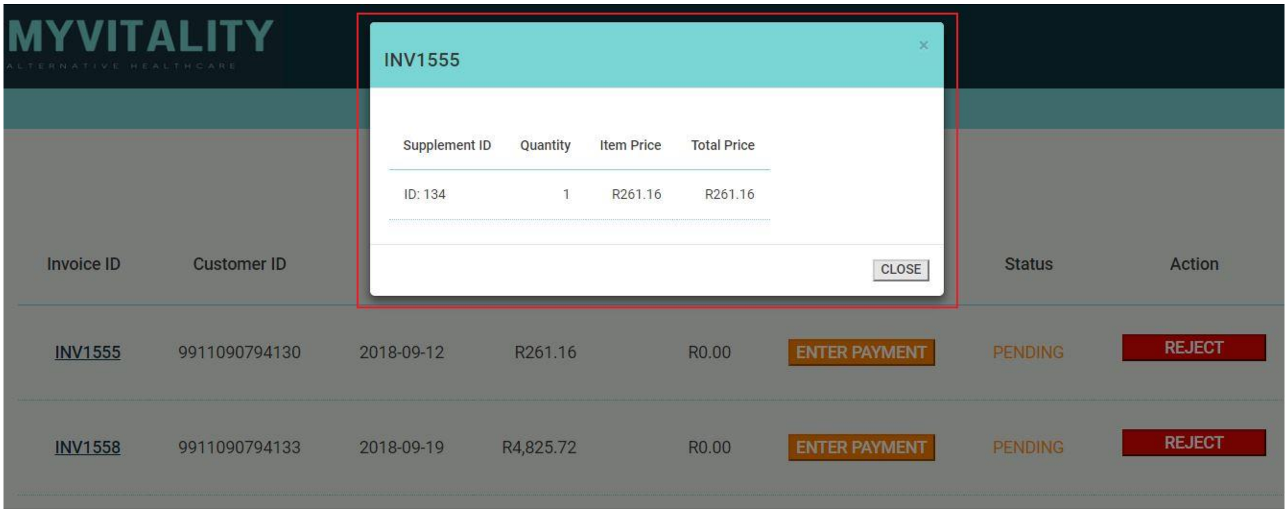


Figure 14

What do the status indicators mean?

A status indicator shows the user what stage the order is in the order fulfillment process. The status indicators used are as follows:

- PENDING: The order has yet to be confirmed or rejected
- APPROVED: The order has been approved for shipment
- REJECTED: The order has been rejected.
- SHIPPED: The order has been shipped to the customer

Status indicators are listed under the heading 'Status'. An example is shown in Figure 15, circled in red.

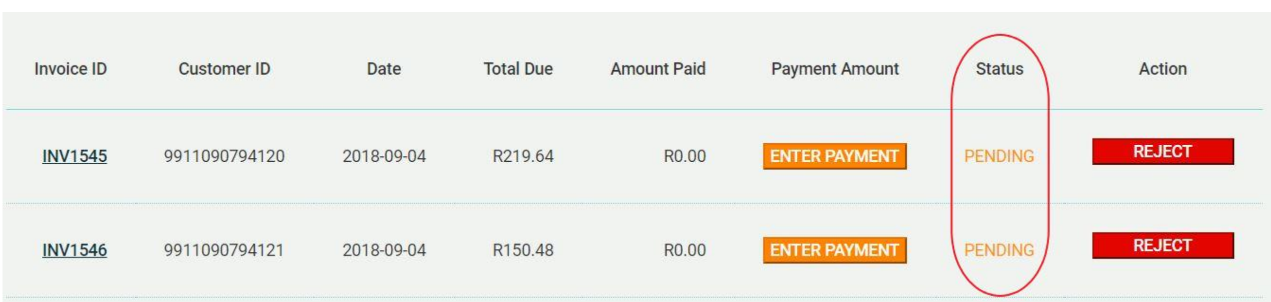


Figure 15

How do I confirm a customer's payment?

To confirm a customer's payment, navigate to the 'Pending Orders' page, located in the Orders section of the system. For more information on how to do this, see the section titled 'How do I view pending transactions?'.

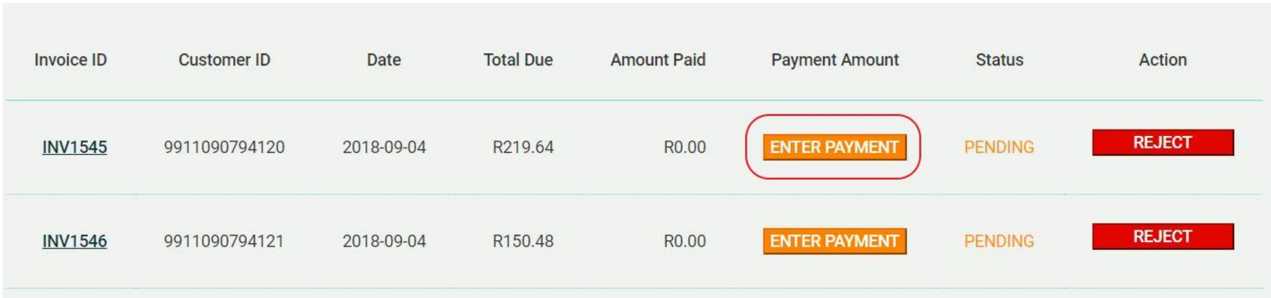


Figure 16

From here you click the 'ENTER PAYMENT' button (marked in red, see Figure 16 above). A pop-up box will appear (marked in red, see Figure 17 below).

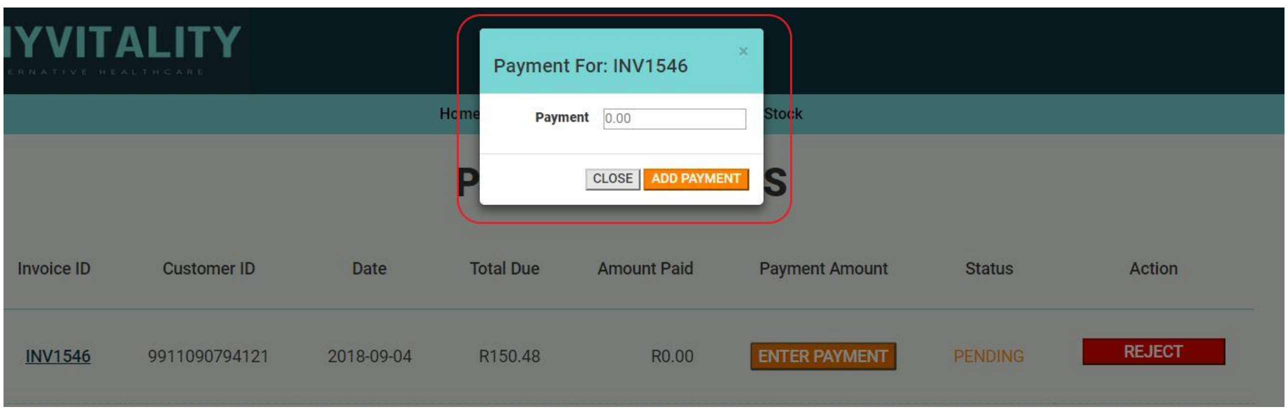


Figure 17

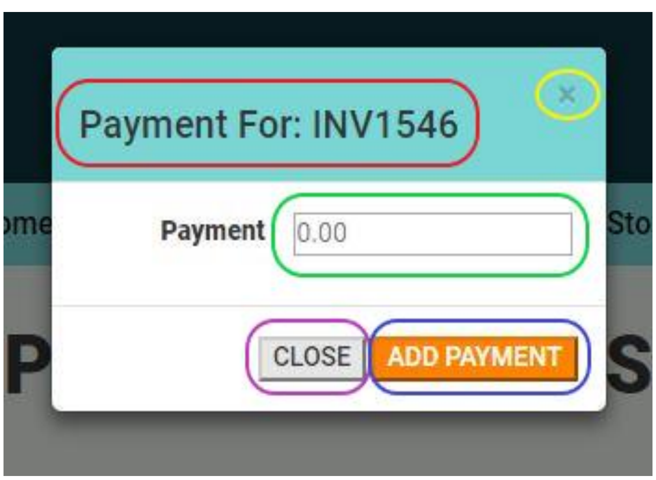


Figure 18

Confirm that it is the correct invoice, by double checking the invoice ID in the heading of the box (marked in red, see figure 18) before entering a payment.

To enter a payment, click on the payment box and enter the required payment (marked in green, see figure 18).

To confirm the payment, press the 'ADD PAYMENT' button (marked in blue, see figure 18).

To exit the payment box without confirming the payment, press either the 'x' in the top right corner of the pop-up box (marked in yellow, see figure 18), or press the 'CLOSE' button in the footer of the pop-up box (marked in purple, see figure 18)

Once the box has been closed, you can check the status of the order (marked in red, see figure 19).

Invoice ID	Customer ID	Date	Total Due	Amount Paid	Payment Amount	Status	Action
INV1546	9911090794121	2018-09-04	R150.48	R150.48	ENTER PAYMENT	APPROVED	REJECT

Figure 19

If you enter a payment by mistake, you can reset the amount by entering 0.00 into the payment box shown in figure 18.

How do I reject an order?

To reject an order, navigate to the 'Pending Orders' page, located in the Orders section of the system. For more information on how to do this, see the section titled 'How do I view pending transactions?'.

Once you are at the 'Pending Orders' page, to reject an order, click the 'REJECT' button in the action column (marked in green, see figure 20). Make sure that the button you click is in the row associated with the Invoice ID (marked in red, see figure 20).

Invoice ID	Customer ID	Date	Total Due	Amount Paid	Payment Amount	Status	Action
INV1545	9911090794120	2018-09-04	R219.64	R0.00	ENTER PAYMENT	PENDING	REJECT
INV1546	9911090794121	2018-09-04	R150.48	R0.00	ENTER PAYMENT	PENDING	REJECT

Figure 20

If you reject an order by accident, you can re-enter a payment to override the reject operation. To do this, follow the instructions in the section titled 'How do I confirm a customer's payment?'.

How do I view the status of an order?

To view the status of an order, navigate to the Orders section of the system. To do that, choose one of the Order menu options located in the navigation bar at the top of the page (marked in red, see figure 21).

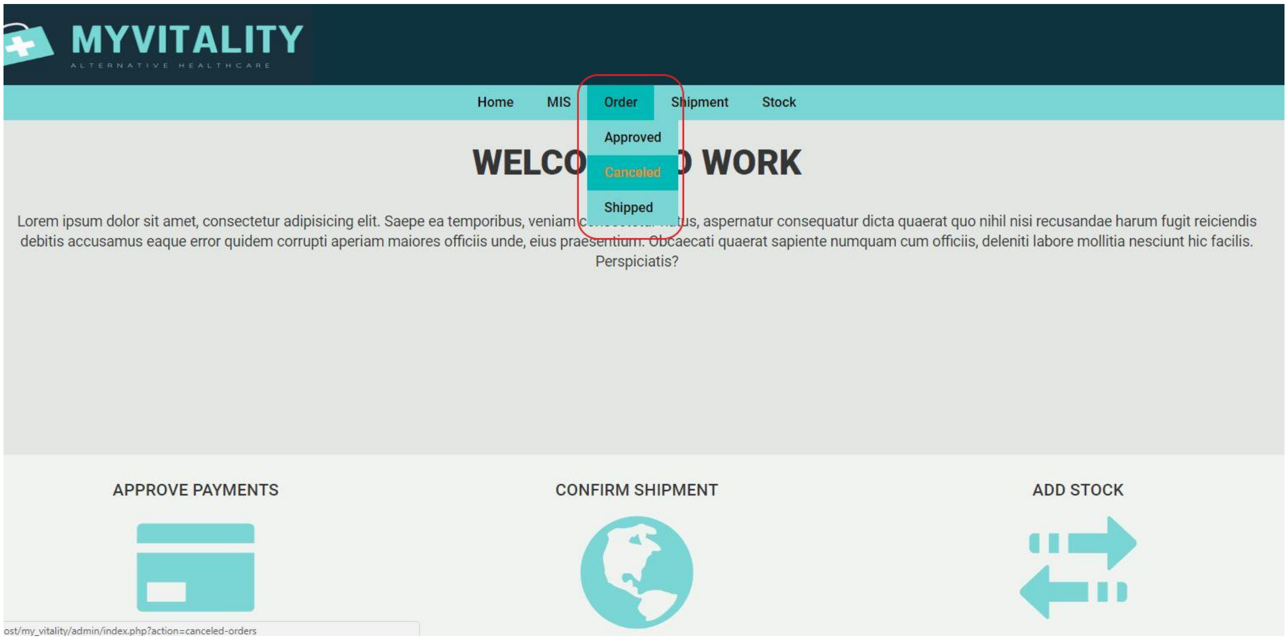


Figure 21

To see pending transactions, chose 'Order';

To see approved transactions, choose 'Approved';

To see rejected transactions, choose 'Cancelled';

To see shipped orders, choose 'Shipped';

For more information on what the headings on the pages indicate, see the section titled 'How do I view pending transactions?'.

For more information on status indicators, see the section titled 'What do the status indicators mean?'.

How do I view orders that are ready to be shipped?

To view orders that are ready to be shipped, navigate to the 'Shipment' page, located in the Shipments section of the system. To do that, use the navigation bar at the top of the page and choose the 'Shipment' option (marked in red, see figure 22).

Figure 22

Once you have been directed to the Shipment page, you will be able to view the following information:

- Table headings (marked in brown, see Figure 23)
- Invoice ID (marked in orange, see Figure 23). The invoice ID is clickable. When clicked, the contents of the invoice will appear in a pop-up box.
- Customer ID associated with a specific invoice (marked in dark red, see Figure 23)
- Customer's delivery address (marked in green, see Figure 23)
- Courier used to ship the order. If the order is yet to be shipped, this section will be blank (marked in purple, see Figure 23). If the order has been shipped, the courier used will be displayed here.
- The status of an order (marked in blue, see Figure 23 and Figure 24). For more information on status indicators, see the section titled 'What do the status indicators mean?'.
- The 'SHIP ORDER' button (marked in yellow, see Figure 23). This button can be clicked to confirm that the order has been shipped.

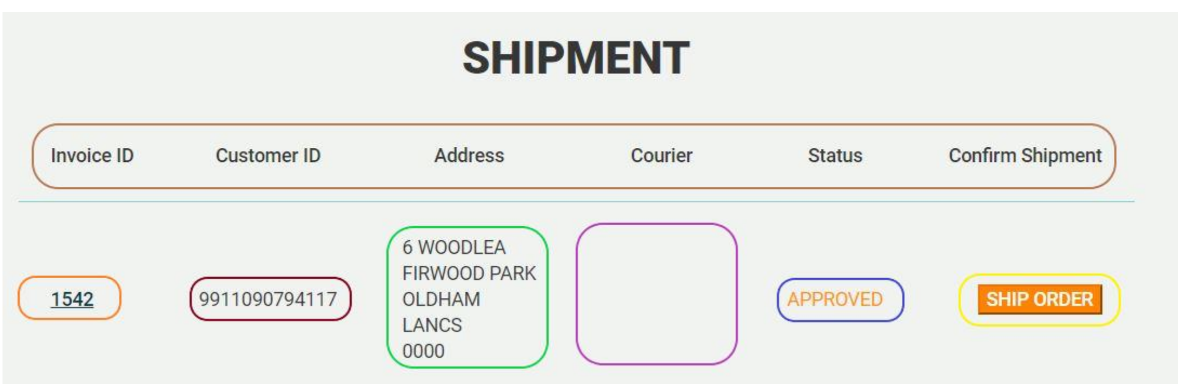
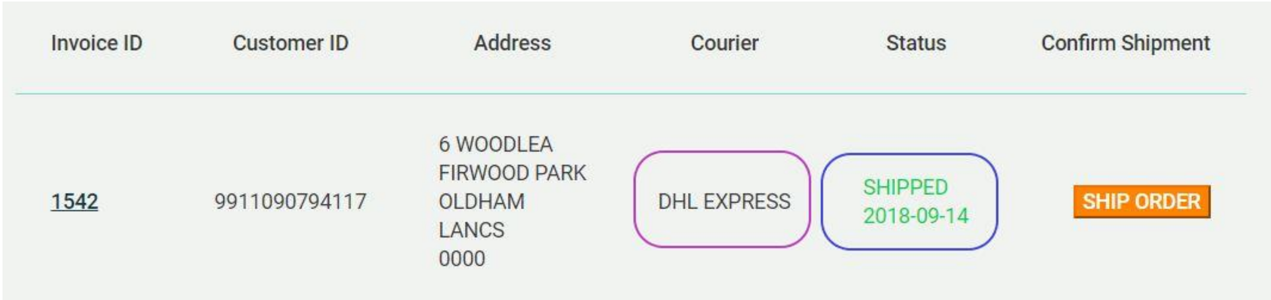


Figure 23



Invoice ID	Customer ID	Address	Courier	Status	Confirm Shipment
1542	9911090794117	6 WOODLEA FIRWOOD PARK OLDHAM LANCS 0000	DHL EXPRESS	SHIPPED 2018-09-14	SHIP ORDER

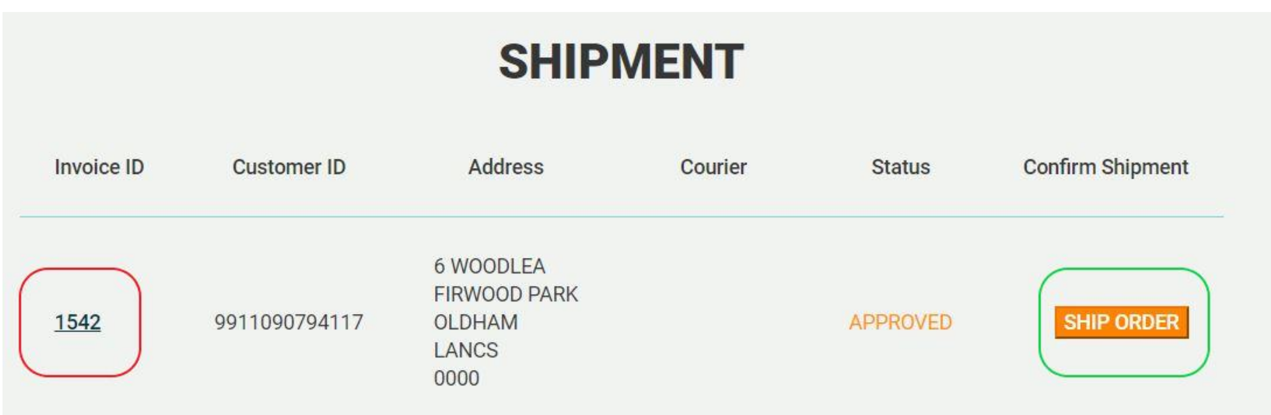
Figure 24

How do I record that an order has been shipped to the customer?

To record that an order has been shipped to a customer, navigate to the 'Shipment' page, located in the Shipments section of the system. To do that, use the navigation bar at the top of the page and choose the 'Shipment' option (marked in red, see figure 25).

Figure 25

Once you have been directed to the Shipment page, you can view the contents of the order by clicking on the invoice number order (marked in red, see Figure 26). Press the 'SHIP ORDER' button (marked in green, see Figure 26) and wait for the pop-up box to load. For more information on the data displayed on this page, see the section titled 'How do I view orders that are ready to be shipped?'.



SHIPMENT

Invoice ID	Customer ID	Address	Courier	Status	Confirm Shipment
1542	9911090794117	6 WOODLEA FIRWOOD PARK OLDHAM LANCS 0000		APPROVED	SHIP ORDER

Figure 26

Now that the pop-up box has been loaded, you will be presented with the following:

- a header that contains the invoice number (marked in orange, see Figure 27),
- a drop-down menu to select the courier that was used to ship the order (marked in red, see Figure 27), and
- a 'CONFIRM' button (marked in purple, see Figure 27),
- a table that contains the information of the couriers (marked in blue, see Figure 27),
- a 'CLOSE' button (marked in green, see Figure 27), and a 'X' in the top right corner of the pop-up

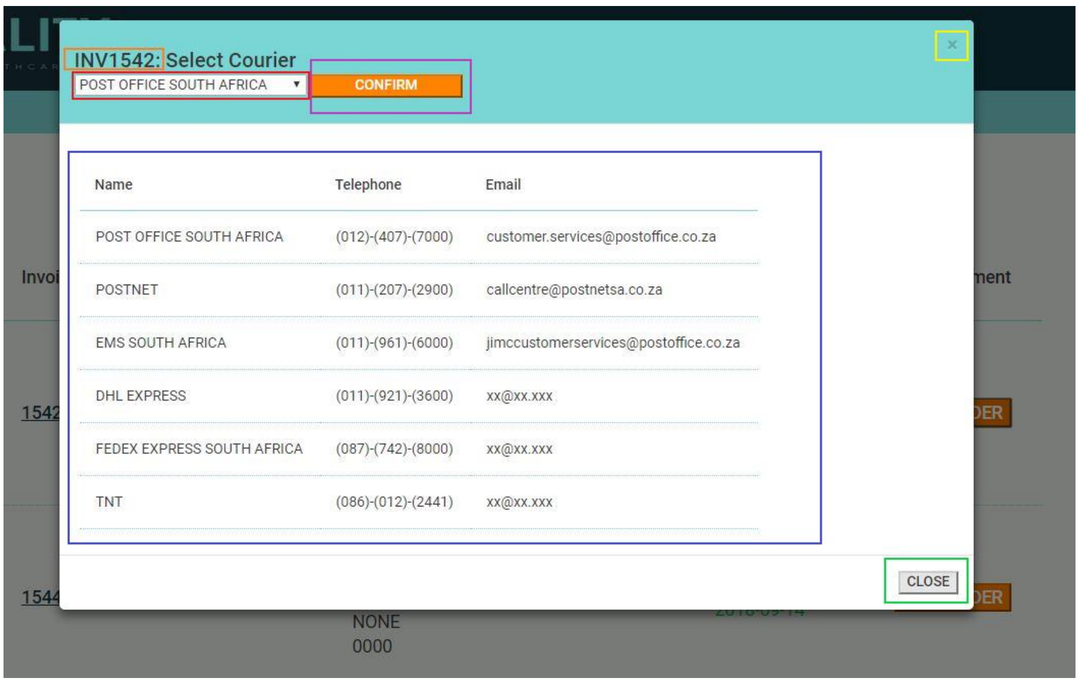


Figure 27

(marked in yellow, see Figure 27), to exit the pop-up without processing the request.

Once you have confirmed the shipment, check the status of the order (marked in blue, see Figure 28), and the courier selected (marked in purple, see Figure 28), is correct.

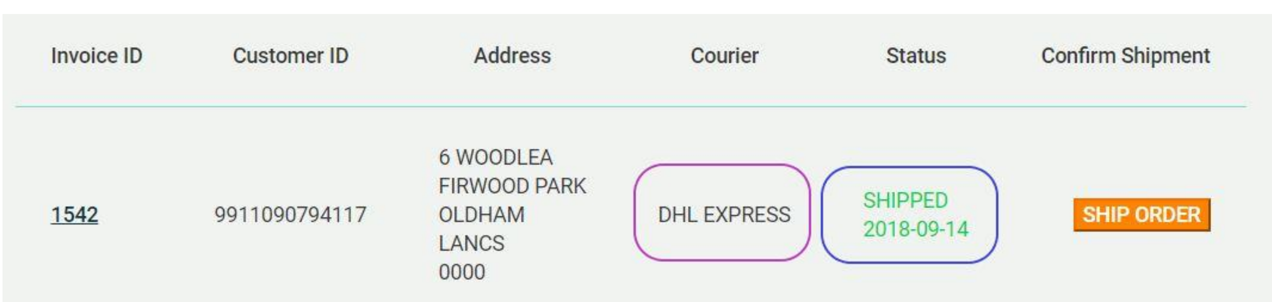


Figure 28

How do I view orders that have been shipped?

To record that an order has been shipped to a customer, check that the status of an order has changed when you record that an order has been shipped. For more information on how to do this, see the section titled 'How do I record that an order has been shipped to the customer?'.

Alternatively, you can navigate to the 'Sent' page with is a dropdown menu option below 'Shipment'. To do that, use the navigation bar at the top of the page and hover over the 'Shipment' (marked in red, see figure 25) option to reveal the dropdown menu and click 'Sent'. From this page you can view the following information that is associated with a shipment:

- table header (marked in yellow, see Figure 29),
- invoice number (marked in purple, see Figure 29),
    - the invoice number can be clicked to open a window showing the contents of the shipment
- the customer ID (marked in blue, see Figure 29),
- customers delivery address (marked in green, see Figure 29),
- courier used to ship the order (marked in red, see Figure 29),
- the status of the order and the date it was shipped (marked in orange, see Figure 29)

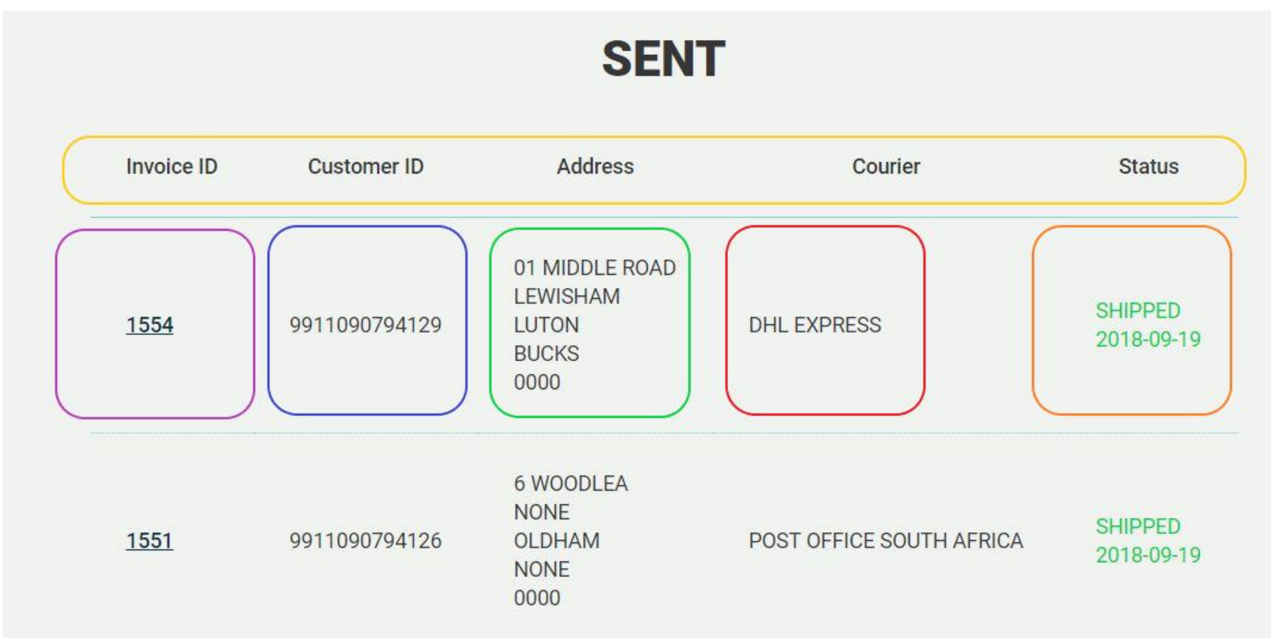


Figure 29

How do I view stock levels?

To view stock levels, navigate to the 'Stock' page, located in the Inventory section of the system. To do that, use the navigation bar at the top of the page and choose the 'Stock' option (marked in red, see Figure 30).

Figure 30

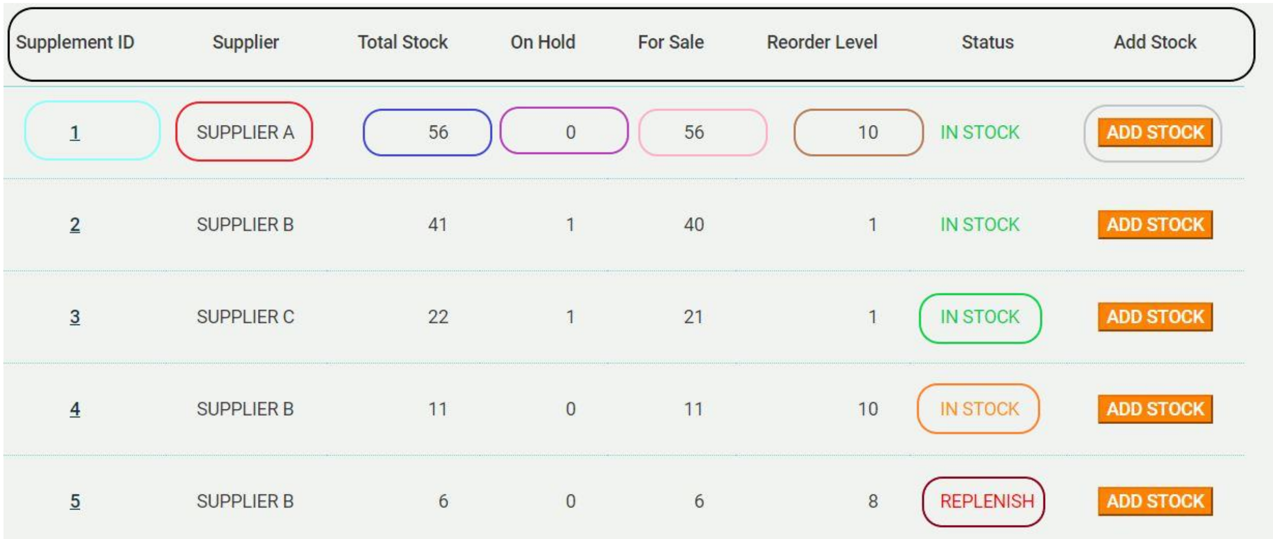
Once you have been directed to this page, you can view the stock levels of all the supplements that are stored in the system. The following information is displayed:

- table header (marked in black, see Figure 31)
- Supplement ID (marked in light blue, see Figure 31). The supplement ID can be clicked to show the details of how it can be purchased (marked in red, see Figure 32 two figures down).
- Supplier name (marked in red, see Figure 31)
- The total amount of stock in the system (marked in blue, see Figure 31)
- The amount of stock that is on hold, waiting for payment approval (marked in purple, see Figure 31)
- The amount of stock that is available for sale (marked in pink, see Figure 31)
- The amount at which stock needs to be re-ordered (marked in brown, see Figure 31)
- A status indicating the stock levels for each supplement
    - A green 'IN STOCK' indicator means that the total stock level is above the re-order level (marked in green, see Figure 31)
    - An orange 'IN STOCK' indicator means that the total stock level is above the re-order level, but that it is within 10% of the re-order level. This means that the stock is close to needing to be re-ordered (marked in orange, see Figure 31)
    - A red 'REPLENISH' indicator means that the supplement is at or below the re-order level and that it needs to be replenished (marked in dark red, see Figure 31)

When the supplement ID is clicked, a pop-up box will be displayed (marked in red, see Figure 32), showing the following information:

- The supplier name and any comments about that supplier (marked in green, see Figure 32)
- The contact details for a specific person(s) at the supplier (marked in orange, see Figure 32)

- The banking details of the supplier (marked in blue, see Figure 32)
- Buttons to close the pop-up window (marked in yellow, see Figure 32)



Supplement ID	Supplier	Total Stock	On Hold	For Sale	Reorder Level	Status	Add Stock
1	SUPPLIER A	56	0	56	10	IN STOCK	ADD STOCK
2	SUPPLIER B	41	1	40	1	IN STOCK	ADD STOCK
3	SUPPLIER C	22	1	21	1	IN STOCK	ADD STOCK
4	SUPPLIER B	11	0	11	10	IN STOCK	ADD STOCK
5	SUPPLIER B	6	0	6	8	REPLENISH	ADD STOCK

Figure 31

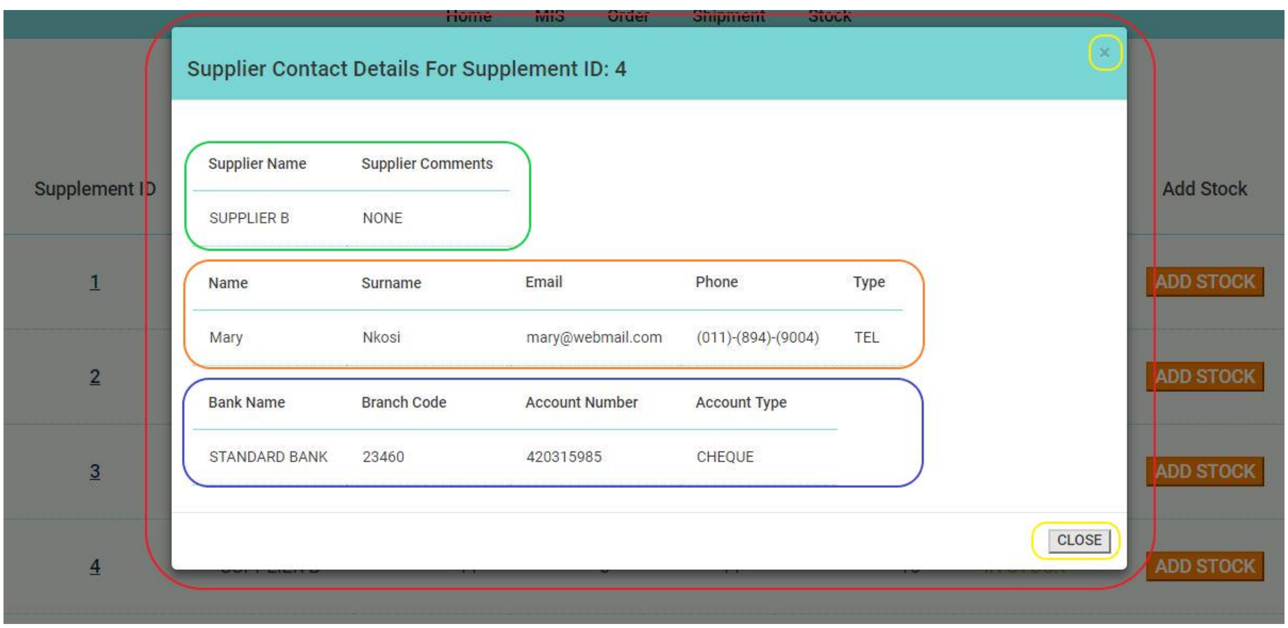
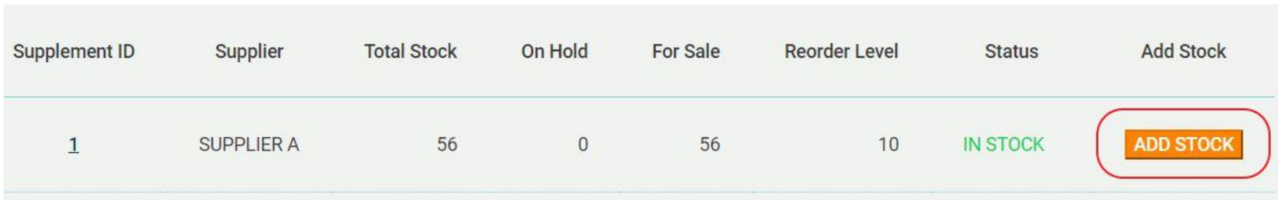


Figure 32

How do I add new stock to the system?

To add stock to the system, navigate to the 'Stock' page, located in the Inventory section of the system. For more information on how to do this, navigate to the section titled 'How do I view stock levels?'.

Once you are at this page, click on the button titled 'ADD STOCK', (marked in red, see Figure 33) and a pop-up window will appear (marked in red, see Figure 34).



Supplement ID	Supplier	Total Stock	On Hold	For Sale	Reorder Level	Status	Add Stock
1	SUPPLIER A	56	0	56	10	IN STOCK	ADD STOCK

Figure 33

On the pop-up window you will find the following information:

- Supplement ID of the item you selected (marked in orange, see Figure 34)
- The date it is logged to the system (marked in purple, see Figure 34)
- A text box where you enter the cost price per item, excluding VAT (marked in green, see Figure 34)
- A text box where you enter the quantity of stock purchased (marked in brown, see Figure 34)
- Buttons that will exit the window without adding a transaction (marked in yellow, see Figure 34)
- A 'ADD STOCK' button that will add the details entered to the system. (marked in blue, see Figure 34)

In the pop-up window, enter the following details, and then press the 'ADD STOCK' button to complete the transaction, or one of the close buttons to exit without completing the transaction.

- The cost price excluding VAT paid per item
- The quantity purchased

Note:

- The cost including VAT is calculated automatically at a rate of 14%
- If the cost entered is different than the current cost stored in the system, a new cost price will automatically be generated.

- The client cost will automatically be generated by the system, to include VAT and markup costs.

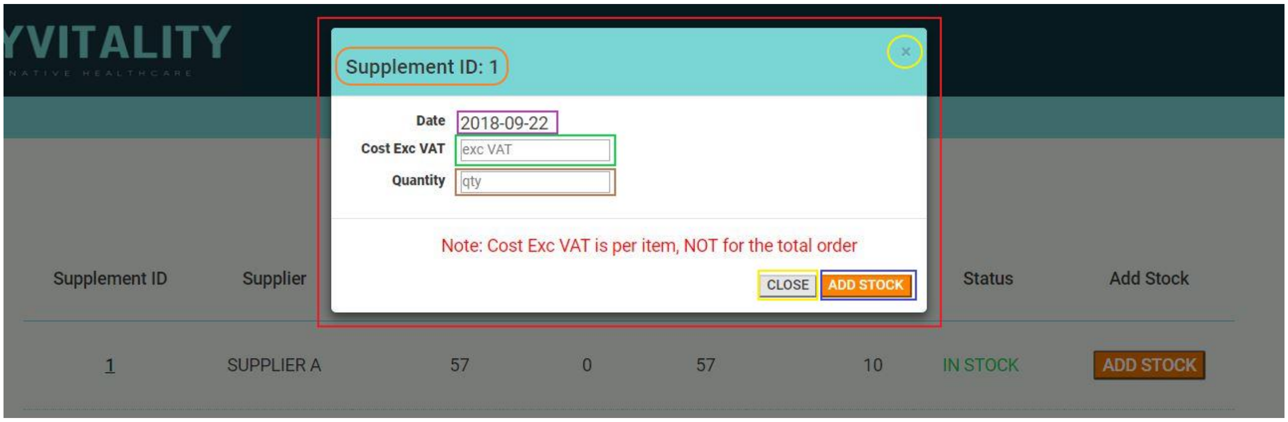


Figure 34

How do I view what stock has been added to the system?

To view the stock that was added to the system, navigate to the 'Journal' page, located in the dropdown menu of the 'Stock' page. For more information where the 'Stock' page menu option is located, navigate to the section titled 'How do I view stock levels?'.

Once you are directed to this page, you can view the following information:

- Table header (marked in black, see Figure 35)
- Date stock was purchased (marked in orange, see Figure 35)
- The cost of each item excluding VAT (marked in blue, see Figure 35)
- The cost of each item including VAT (marked in yellow, see Figure 35)
- The quantity purchased (marked in brown, see Figure 35)
- The supplier ID (marked in red, see Figure 35)
- The supplement ID (marked in green, see Figure 35)

PURCHASE JOURNAL

Date	Cost Exc VAT	Cost Inc VAT	Quantity	Supplier ID	Supplement ID
2018-09-19	195.86	223.28	2	SUPPLIER C	10
2018-08-25	201.00	229.14	5	SUPPLIER B	5

Figure 35

How do I log into the system?

To start the administration system, enter the following URL into your browser http://myvitality.tk/admin/

When you start the administration system, you will be directed to the login screen (marked in blue, see Figure 36).

Enter your user name and password into the username (marked in yellow, see Figure 36) and password boxes (marked in red, see Figure 36). Then press the 'LOGIN' button (marked in orange, see Figure 36) to complete the login process.

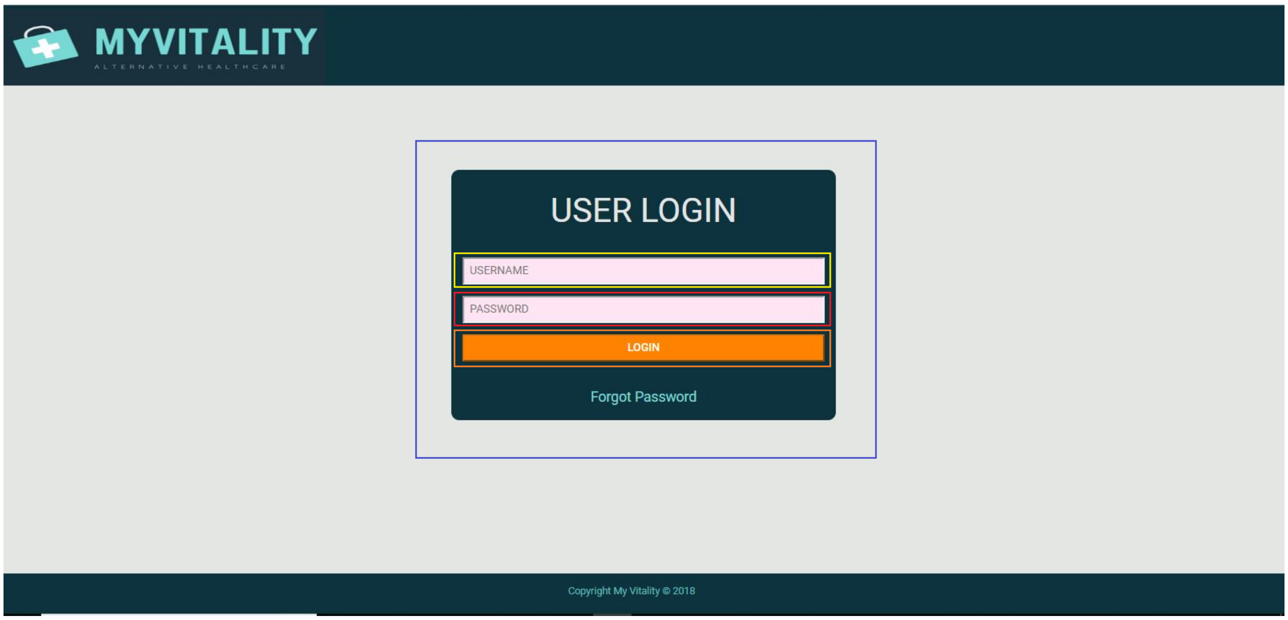


Figure 36

Your username and password will be provided by system administrator.

Usernames and passwords adhere to the following rules:

- Must be at least 8 characters in length
- Must be a maximum of 30 characters in length
- Can contain uppercase letters
- Can lowercase letters
- Can contain numbers 0 through 9

If there is an error logging into the system, see the error message in the login box (marked in red, see Figure 37)

Figure 37

How do I logout of the system?

To logout of the system, click on the icon or 'Logout' text in the upper right-hand corner of the screen (marked in red, see Figure 38).

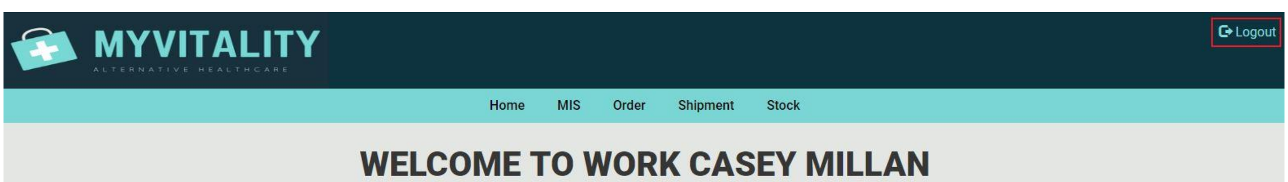


Figure 38

What do I do if I forget my password?

If you forget your password, on the login screen, click the link 'Forgot Password' (marked in red, see Figure 39). A popup window will now appear (marked in red, see Figure 40) where you can enter your username (marked in green, see Figure 40) and then press the 'REQUEST' button to request your new password (marked in purple, see Figure 40). You may close the window without requesting a new password by clicking on either of the close buttons (marked in yellow, see Figure 40).

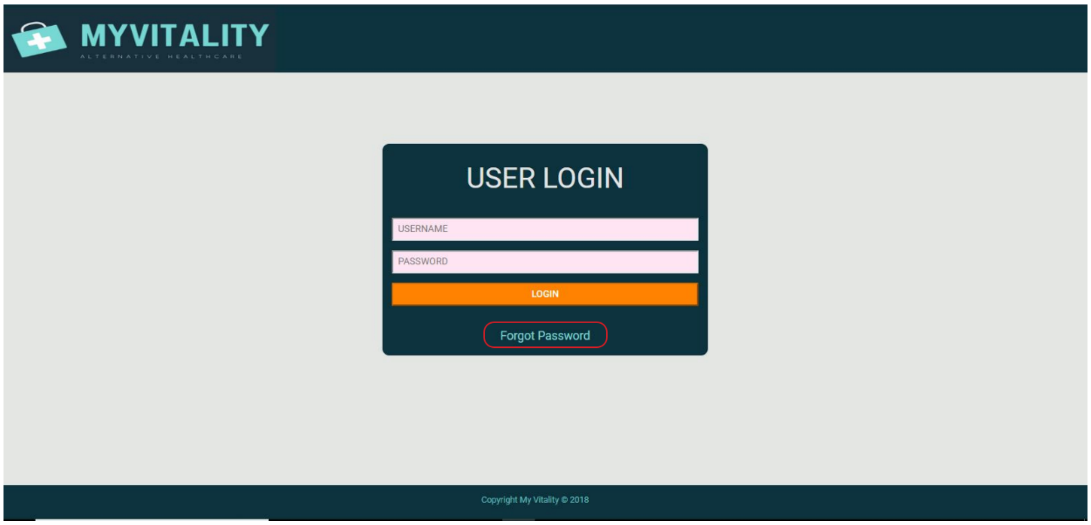


Figure 39

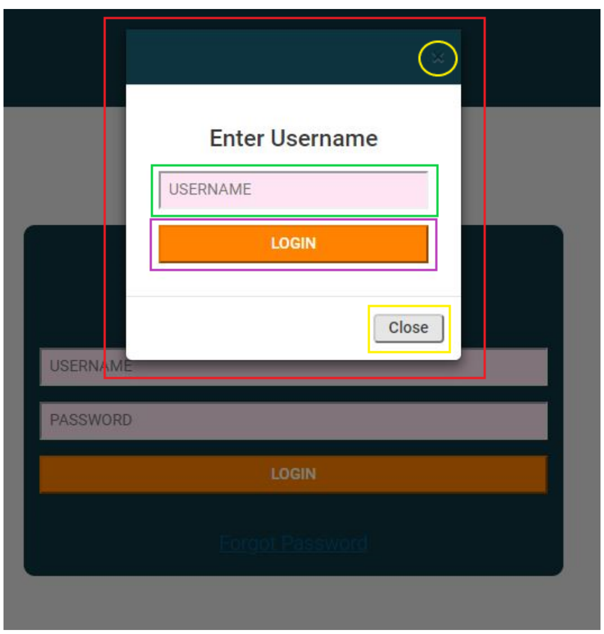


Figure 40

The system administer will contact you to provide you with a new password.

How do I start the system?

To start the system, start your browser and enter the following URL into the search bar.
http://myvitality.tk/admin/ (marked in red, see Figure 41)

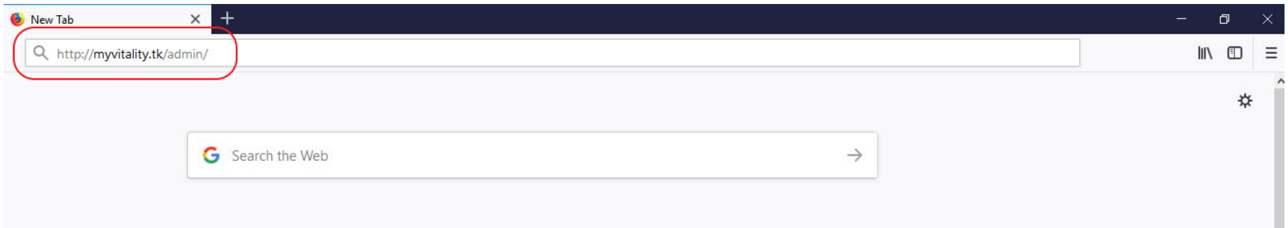


Figure 41