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OPTYCONNECT

Helping Healthcare Get Connected

Hello,

Welcome to OptyDash's Platform PDF guide. In this guide, you will find a full breakdown of our product, all of its distinct features, and how they will benefit you as a consultant, or as any size business. We're looking forward to adding you to our family and having you experience our wonderful product! If you have any further questions, please reach out to a member of our team!

-The OptyDash Team

Product Index:

CRM Client Management

Client Management & Automations

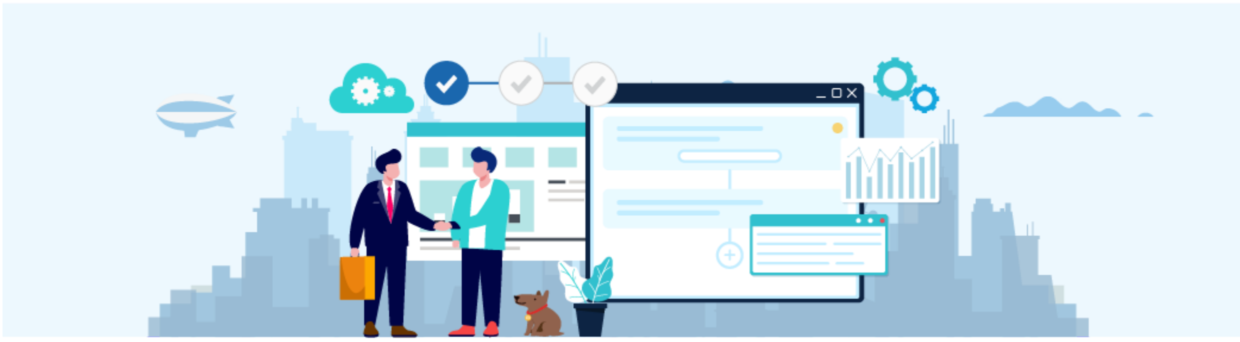
- Add contacts manually, by import, or by embedding a form on your website
- Automatically add contacts to a built in email marketing campaign
- Automatically assign permissions to files, documents, or pages using Client Circles.
- Automatically assign contacts to a specific coordinator (point of contact)
- Automatically schedule your calendar with prospect and client follow-ups
- Automatically generate projects using project profiles and templates

Embed Intake Forms On Your Site

- Customize the Intake Form with your questions and custom data fields
- Easily create custom fields while customizing the intake form to your liking
- Customize the styling of the form via built-in settings and custom CSS (Cascading Style Sheets) so that it looks perfect
- Automatically assign permissions and automatically trigger automations when the form is submitted

Use Forms In Your Portal

- CRM Update Forms let you update existing contacts or present them with follow-up Forms that add more info to their profiles
- For each form, all of the actions that are triggered can be customized for when the form is submitted. Available Actions (Automations & Integrations) will grow over time
- General purpose forms give your business even more flexibility
- Trigger Automations & Integrations automatically



Automated Client Onboarding

Intake Forms

- Embed Intake Forms on your website for self-registration to the portal
- Automatically assigns projects, invoices, and folders to new clients
- Automatically trigger automations when your forms are submitted

Onboarding Flows

- Automatically trigger a FLOW for a new client to complete before they can access the secure portal
- Clients can eSign contracts, fill out forms, upload files, and more, all automated
- The entire flow of triggered actions can be completely automated. You get to sit back and relax while the software does the paper pushing for you

Automate With Client Circles

- Assign circles to clients, which allows you to group people based on affiliation of your choosing
- Clients can belong to as many or as little circles as you like
- Simple drag and drop interface

Trigger / Actions Automations

- Automatically add and email contacts your marketing emails
- Automatically assign permissions to Files/Docs/Pages using Client Circles

Secure Client Portal

Powerful & Flexible Client Portal

- Full customizable Client Portal
- Clients can access only their information
- Post files and documents for Clients to view and download
- Create a customized website-like structure for your clients
- Clients can view and pay invoices online

Build Dynamic Data Dashboards

- Pre-Built dashboards and pages get you going quickly and easily
- Set what pages your clients see
- Everything is fully responsive from tablets to phones
- Embed widgets like Youtube if you want the client to see a video

Dynamic Link Placeholders

- Easy to build dashboards with dynamic placeholders
- Links automatically adapt based on which client is logged into the platform and viewing the page
- Direct clients exactly where you want them to go

Customize What The Client Can See

- Completely control what clients and prospects can see and do
- Hide any part of the platform you aren't using so they won't see
- Announcements widget allows you to offer a custom message and information to how you've set up the portal to work

‘Company First’ Mode

- You can enable the ‘Company First’ option if you’re working primarily with companies as your clients
- If mode is enabled, you can assign all portal items to the company directly. The ‘Primary Contact’ will be the person at the company who receives all the notifications and updates
- If they leave the company, you can easily re-assign a new ‘Primary Contact’

Drag & Drop Page Builder

- Easily create complex layouts and designs
- Drag and drop content blocks, photos, icons, etc
- All content can be made fully responsive, so it displays flawlessly on any digital device
- Built-in ‘Snippets & Templates’ library is continually updated with fresh pre-built layouts and blocks

Pay For Portal Access

- You can require payment to register and enter your portal
- One time payment or a recurring subscription payment
- Works with all available payment providers (At this time, there are no recurring subscription payments possible with PayPal.)
- Portal access is blocked until payment is made and verified

White Label Your Client Portal

- Customize client experience with YOUR logo and colors
- Customize all email notifications sent to your clients and staff
- Replace ‘OptyDash’ URL with your custom URL
- Your clients WILL NOT see the OptyDash brand

‘Magic Link’ Login

- Make it beyond easy for your clients to login
- Clients don’t ever need to remember their password
- Perfect for clients who don’t know everything about technology, there will be no hang-ups for them to login
- Clients just enter their email address and receive a link
- Clicking the link automatically logs them in

Secure File Sharing Portal (File And Folder Sharing)

Highly Organized File Structure

- Each client has a dedicated sharing folder
- Each project has its own dedicated sharing folder
- Create your own folder structures
- Client is notified whenever you share a file or folder
- Entire folders can be downloaded as ZIP files

Powerful Shared Folders

- To share a folder or files with multiple clients or circles, use shared folders. You can also create shared folders for your staff and teams
- Members in a shared folder receive an email notification when they are first added to the shared folder, and each time a new file is added to the shared folder
- Automate the adding and removal of clients to or from shared folders with the use of circles
- Files can be viewed directly in the browser or downloaded for offline use

Convenient File Request Feature

- Initiate a request, and the client receives an email notification
- Clients don't need to be logged in to upload to the request
- You will receive an email when the file request is complete
- Deadlines can also be added to the requests

Folder Structure Profiles

- Do you ever wish you could automatically set a predefined folder structure for a specific type of client?
- Folders will automatically be generated based on the preferences you select when making a new contact

Simple File Versioning

- Easily upload new versions of a shared file or client file
- Each version is time stamped and organized by date
- Previous versions can be reverted to or accessed
- All versions can be downloaded with the click of a button
- You'll never lose your work again

No Limit To File Size Or Type

- Transfer your massive files, hassle free
- To use a proprietary file type, just add the extension
- You can limit what file types you will accept

Download Folder As Zip File

- You can pre-create folders with entire file repositories inside
- Grant permissions and a prospect or client can access and download the entire file
- Folder structure will be maintained in the process

Project & Task Management

Kanban Project View

- One of the most popular project management techniques for optimizing workflow
- Card-based system helps you visualize status and progress, and spot potential problems
- Drag and drop cards to switch between columns, automatically updating its information to match
- Two types of Kanban are available, Status View and Assignee View

Project Overview Dashboard

- The best client collaboration experience
- Only show clients what you want to show
- Customize with clients logo
- Show clients what % of the project is completed
- Embed intake forms directly into your website

Sequenced Project Templates

- Structure project template tasks and phases in the order you would like to have them worked on and accomplished
- Create an organized and sequenced set of tasks/phases for your project team to follow and accomplish
- Create a sequenced task list for your client to follow

Auto-Generate Projects

- Pre-create and save profiles with all the details of how you want a project to be auto-generated
- Dynamic naming structure employed using the client's name, current date, etc. Each project will have a unique name
- Built in automations to auto-generate projects during my client onboarding process

- Systemizing your client onboarding process saves time and hassle

Trigger / Actions Automations

- No need to ever do anything manually again, harness the power of automations
- Has IF THIS, THEN THAT functionality. Build automated workflows that maximize efficiency and increase your bottom line profits!
- Trigger a customizable action sequence each time a project phase is complete
- Trigger an action sequence when a project wraps up

Project & Task Files

- Files that are uploaded to a task or to a project are well organized in their own insulated structure
- Private Project Files allow you to store files associated with the project in a private place the client doesn't know exists and will never be able to see

Manage All Team Members

- Admins and Project Managers can easily view tasks related to users in one place. Giving you a birds eye view of what is happening
- High-level users can also delve into particular projects to get a deeper history of actions taken, comments made, files uploaded, and more

Search, Filter, & Sort Tasks

- Anyone can easily locate a specific task using filters, sorting, and tagging
- Task lists can be sorted and filtered by various attributes, including status, priority, assigned user, due date, and more

My Tasks Widget

- My Tasks Widget lets your team and clients see incomplete tasks directly on their dashboard
- For each task in the My Tasks Widget you can click from the widget to get to task details
- You can control the layout and which widgets show on the dashboard for every user role

Email Notifications For All Actions

- Automatic email notifications related to tasks and projects ensures everyone is always aware of their responsibilities
- Customizable emails will be sent to the user based on actions you deem important
- Each user can also customize their notifications on a personal level

Secondary Clients

- Designed for when you need to collaborate on a project with more than one person in a company or team
- Add additional users on the client side for a project
- Secondary clients can be assigned to tasks and can be added as followers to tasks

Project Quick Switcher

- When you switch projects you'll land on the new project in the same mode/position where you left it
- Perfect for a project manager who is lacking ime and quickly moving between projects

Proofing & Client Approval

Get Task Approval From Clients

- Choosing to include if you need client feedback on a particular task is as easy as checking a box. If you don't, leave it be
- Checking the box for requiring feedback adds another set of buttons on the client view, allowing them to easily approve or reject a particular task

Intuitive Client Feedback Process

- Clients can provide feedback on a task by clicking one of the two buttons and typing a few words into the comment box
- The process is incredibly streamlined, meaning your clients will be able to adapt to the workflow very quickly, ensuring you get the feedback you need to crush that project deadline date

Visible Approval Tags

- From the main tasks table, you can easily see what client tasks have or haven't been approved yet as well as easily see what tasks have been rejected, along with their comments
- From the clients view, they can also see what tasks they need to provide feedback on thanks to the easy-to-read approval tags

Invoicing & Billing Tools

One Time Estimates & Invoices

- Build and send out estimates and invoices to clients, using ‘Items’, ‘Taxes’, and ‘Discounts’
- Clients receive automatic email notifications of new estimates/invoices, and they can view and pay their invoices right inside their portal using your choice of payment gateway
- You’ll be notified via email as soon as a client makes payment, and the payment will be automatically logged for you to access in the ‘Payments’ tab
- You can also allow clients to make partial payments on their assigned Invoices, or require the full amount to be paid at one time

Recurring Invoice Profiles

- Easily create a ‘Recurring Profile’ for invoices, and populate the profile with items, taxes, and discounts as desired
- Once the profile is filled out to your liking, you can set the time frame for it to recur (weekly, monthly, every 3 months, etc), and assign it to one or more clients
- Just set up the ‘Recurring Profile’ once, and then relax as OptyDash does the rest automatically

Subscription Dashboard

- A single stop overview of all Client Subscription Payments
- View all subscription details, prices, and clients who are on that subscription plan
- Clients can view all of their subscriptions in their ‘Subscription Dashboard’
- Clients can change the payment method from their ‘Subscription Dashboard’
- Clients can manually cancel any subscription from their ‘Subscription Dashboard’

Time Tracking & Billing

- Internal users can track time spent on particular tasks or projects, and then easily convert those completed timers into billable 'Items' that can be added directly to invoices
- Timers provide an easy way to keep track of time spent on on-the-go tasks like client conference calls and work lunches
- Set hourly rates for each user, and optionally hide it from that user if you don't want them to know your billing amount for their work
- Convert Tasks from projects directly into billable Items, and add them directly to invoices

Your Choice Of Gateway

- All client Invoice payments are processed through your choice of payment gateway, using your own merchant credentials, reducing as many barriers as possible and streamlining the payment and checkout process
- Integration between OptyDash and your chosen payment gateway ensures all payments are tracked, logged, and processed securely
- Stripe, Braintree, PayPal and Authorize.Net are currently supported in OptyDash, with new gateways always in development and on the horizon for future integration

Time Tracking & Billing

User-Managed Time Tracking

- Users can track time spent on particular Tasks or Projects, and Admins and Project Managers can then easily convert those completed Timers into billable ‘Items’ that can be added directly to Estimates or Invoices
- Each Team member can create and manage their own Timers, but conversion to billable Items is only handled by Admins and Managers, ensuring the Client is only billed for real work that occurred

Private Hourly Rates

- Set ‘Hourly Rates’ manually on a per-timer basis, or set default ‘Hourly Rates’ for each of your users
- You can also hide a user’s defined ‘Hourly Rate’ from them, in the event that you don’t want them to know your billing amount for their work
- Only Admins have this level of control, this ensures that only the people you trust are able to define and manage what your clients are charged for

Intuitive Billing Conversion

- Convert completed timers into billable invoice items, these can be added to new or existing invoices, or even added to accumulating invoice profiles for recurring billing purposes
- During conversion, the timer is automatically brought over to the add/edit invoice screen, and all of its data is already in place as an item
- Make any modifications needed, and then choose to send the completed invoice to the client for them to view and pay online at their convenience

Email & Drip Marketing

Choose Your Editing Experience

- Build Email Marketing Campaigns in either our WYSIWYG Visual Editor, or if you're bringing a pre-built HTML template from somewhere else, you can use our Advanced Code Editor
- Seamlessly carry over your existing clients from CRM into Email Marketing, or import email addresses directly via CSV, allowing you to send follow up email 'Campaigns' to your clients
- Schedule email blasts to be sent to clients at any time, or you can send them immediately, all on your schedule
- Email Campaign 'Templates' make email marketing easily repeatable, allowing you to build an Email Campaign once, and then send it continuously and regularly with just a few edits

Collect Leads In Lists

- Email Marketing Lists can be built from your existing CRM (Leads, Prospects, and Clients), your internal users, as well as email addresses you collect outside of OptyDash and imported via CSV.
- Lists can be made up of dozens, hundreds, or even thousands of individual email addresses, and you can easily add and remove addresses at any time, both from your CRM and via import, ensuring your Lists always stay up to date with your latest potential leads and existing customers.

Build Automated Drip Campaigns

- 'Autoresponders' allow you to send automatic emails on a set schedule to any new email addresses that get added to a particular List
- This means you can schedule several 'Autoresponders' inside a List to send at 5 minutes, 1 hour, 3 days, 2 weeks, and so on. These 'Autoresponders' will automatically send to any new email addresses added to that List, on the schedule you set.

- Set them up one time, and then sit back and let ‘Autoresponders’ bring in business and automatic feedback from your leads, prospects, and clients!

Use Your Preferred SMTP

- Email Marketing emails can be sent using a 3rd party SMTP provider like Sendgrid, Amazon SES, MailGun, MailJet, and many others
- These ‘whitelisted’ mail services have agreements with the ISPs and mail providers that help ensure your emails are not filtered as spam
- Or, if you want to use our built in SMTP service, you can activate the Dedicated IP Sending for a small additional fee. Included in this will be a dedicated IP address for sending your emails, only used by you and no other customer.
- The end result of either option is that Email Campaigns are reliably delivered to your Leads, Prospects & Clients

Integrated Calendar

Appointment Scheduling Toolkit

- Prospects/clients can book appointments
- Multiple appointment types can be set. This allows each staff member to be uniquely available to be booked, complete with a personalized custom schedule that works for them
- Appointments show on both the staff member's calendar and on the prospect/client's calendar
- Client or staff can easily cancel Appointments if needed

Bird's Eye View Of All Tasks

- With 'My Calendar', you can easily see all of the tasks from all projects, arranged by due date and color coded by priority (you can even create your own custom priorities, and calendar tasks will be color coded accordingly)
- Having this view lets you quickly see what tasks are coming up, what should have already been done, and who might be falling behind with their assigned workload

Intuitive Filtering

- 'My Calendar' gives you the ability to filter the displayed tasks by a multiple of attributes, including status, priority, project, and assigned user
- You can filter the calendar by particular task due date on a weekly or monthly window, letting you get a more drilled-down view of upcoming (and past due) tasks
- All of the filters allow for multiple items to be chosen, meaning you can filter by several fields at once, allowing you to get exactly the view you need to inspect and manage your projects, tasks, and teams

Granular Task Management

- Beyond the high-level overview power of ‘My Calendar’, you also have the capability to work on an individual task level
- You can easily create new tasks, edit existing task details, and drag-n-drop tasks to change their due dates
- You can also click into a specific task to be automatically taken to that task in the context of its assigned project, allowing you to see all of the comments and other history related to it, giving you a full view all from one starting point

Privacy Encrypted Email

Single Or Group Message Chains

- Send 'Secure Messages' to a single client or internal staff member, or send mass messages out to multiple users all at once
- Recipients will only be able to see and respond to users they are permissioned to communicate with, so there is no risk of wires getting crossed and clients seeing each other's details
- All 'Secure Messages' are delivered to the recipients' OptyDash inbox, and they can easily read and respond just like they would a standard email

Control Who Clients Can Message

- Choose which members of your team your prospects/clients are able to message
- Limit your prospects/clients to only be able to message their coordinator (point of contact)
- Use Circles to set 'Messaging Permissons' in bulk. Use Teams to assign your Staff in one powerful way

Canned Message Responses

- Canned Responses allow you to quickly answer common questions you receive in Secure Messages
- You can create multiple Canned Responses, and easily choose the desired one when responding to a message (or when sending a new message)
- You can even set a specific Canned Response as 'auto-add', which will automatically fill that particular response into the message body whenever you go to send a new Secure Message, or respond to an existing message

Keep Organized With Folders

- ‘Folders’ allow you to organize all of your inbox messages, ensuring that you never lose track of a specific note or important piece of info
- You can create and customize private message folders to fit your needs, and move messages between Folders freely as needed
- Each user can create and manage their own set of ‘Folders’, allowing everyone to organize their ‘Secure Messages’ to best fit their particular workflow

Live Direct & Group Chat

Real-Time Team Chat

- Live chat in real-time with your staff, ensuring everyone stays up to date on any changes to workflow, updates to scheduling, and any other info that you need to disseminate to your team with no delay
- All of your internal users are able to access ‘Live Chat’, and you can set up specific group channels to allow special teams to communicate in unison

One-On-One Or Group Chat

- As useful as one-on-one conversation can sometimes be, being able to communicate with multiple people simultaneously is just as important. That’s why OptyDash ‘Live Chat’ has both
- Easily chat with specific team members individually, and optionally set up group chat channels for live chat with multiple staff at once.
- This flexibility allows you to make live chat fit your specific needs, to best fit your desired workflow

Built-In Browser Notifications

- Never miss a new chat message, even when you are browsing in a different window or tab, with built-in browser notifications for live chat
- Using the default notification system of your preferred web browser, you will be notified whenever a new message is received, both in single person conversations as well as group chats, ensuring you never miss an important message

Chat Sidebar Always Available

- Because Live Chat is a built-in functionality of OptyDash, that means it is visible and accessible everywhere in the app, no matter what page or menu you are on currently
- The chat sidebar, as well as any open chat windows you have, will carry over to any OptyDash page you navigate to, ensuring you will always be only a click away from answering a question or checking in with your team about that current high-level prospect