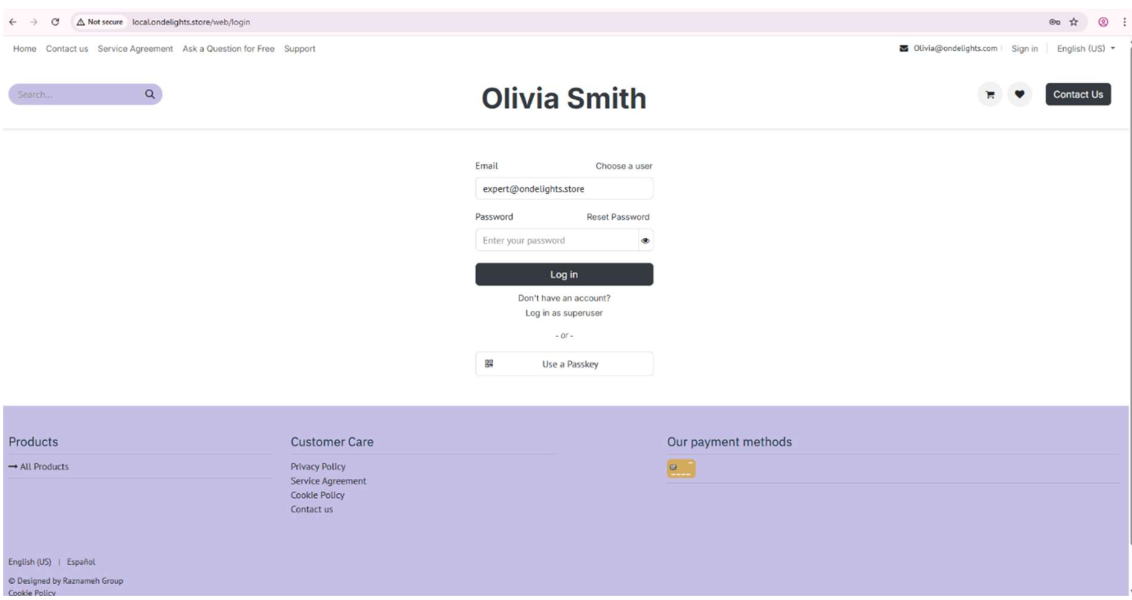
How to work with ERP system

This ERP system is the central hub of your client engagement. Clients can view your products, make purchases, pay directly, book meetings with you, or cancel appointments at their convenience. You can easily create and send invoices to clients for payment. Additionally, you have full visibility into all client schedules and meetings—keeping your operations organized and responsive at every step.

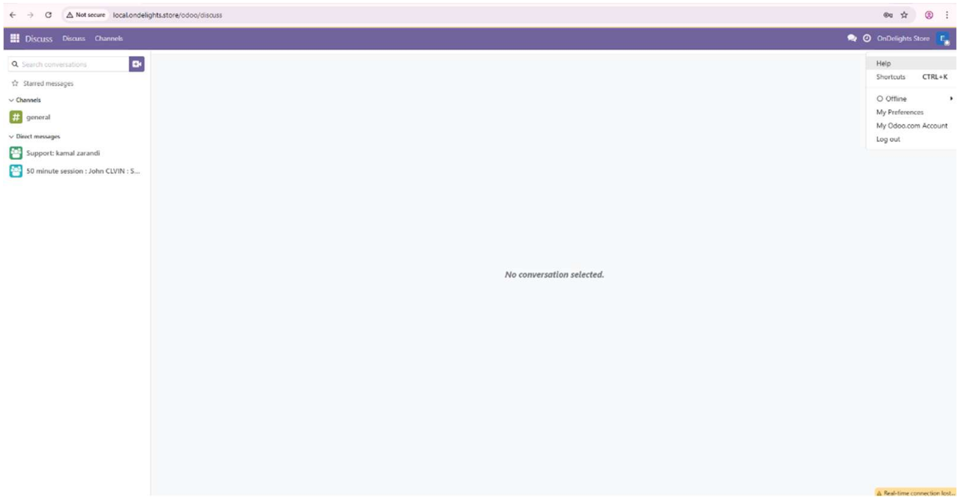
1.Logged in to the platform

We previously sent you the username and password, along with the domain name, to log in to the platform. To access the system, please open the store name in your browser, click on "Log In," and enter the provided username and password to log in to the system.



2.Check and change personal information

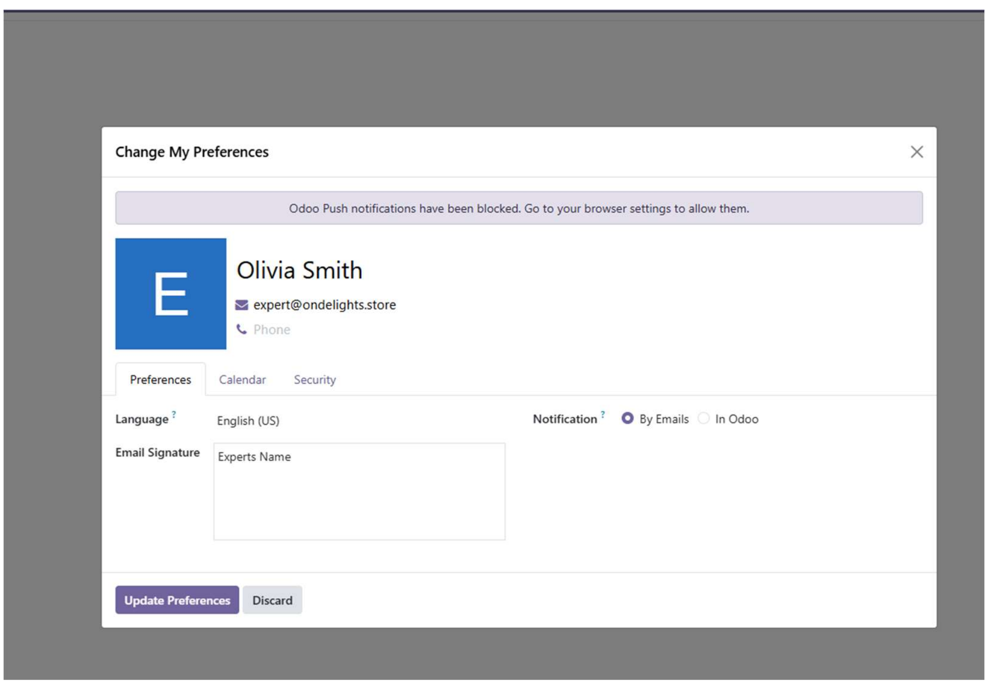
From top right on the platform, you could click on your name, then from the appeared menu click on my preference.



To make sure clients can saw your correct information on the system you need to do all the below steps first:

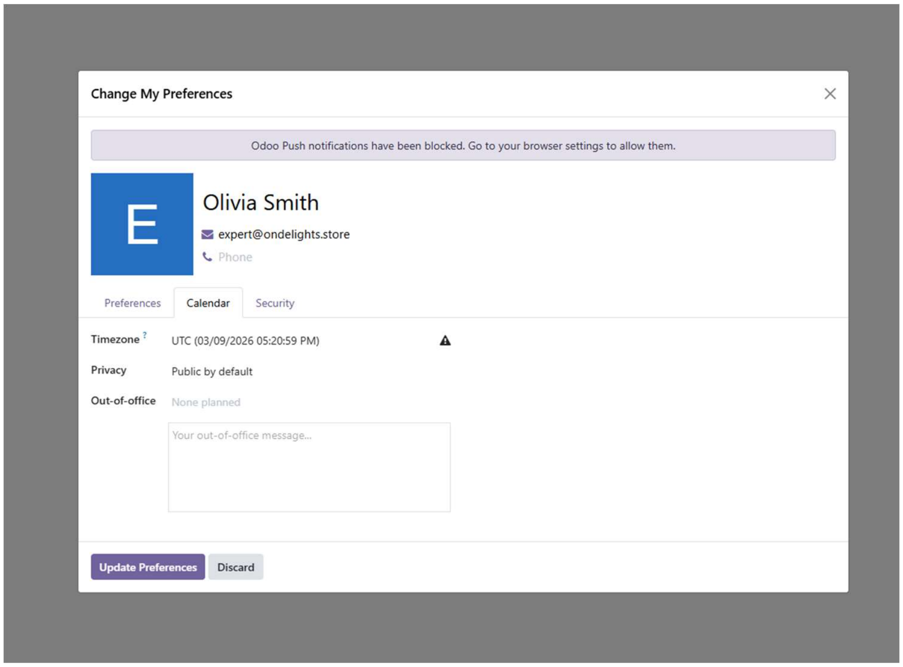
Change your preferences as below:

1. Update your name, but do not change the email as it must be the same as we enter
2. Update your image in the system
3. Update your prefer language
4. Update your email signature on the first tab



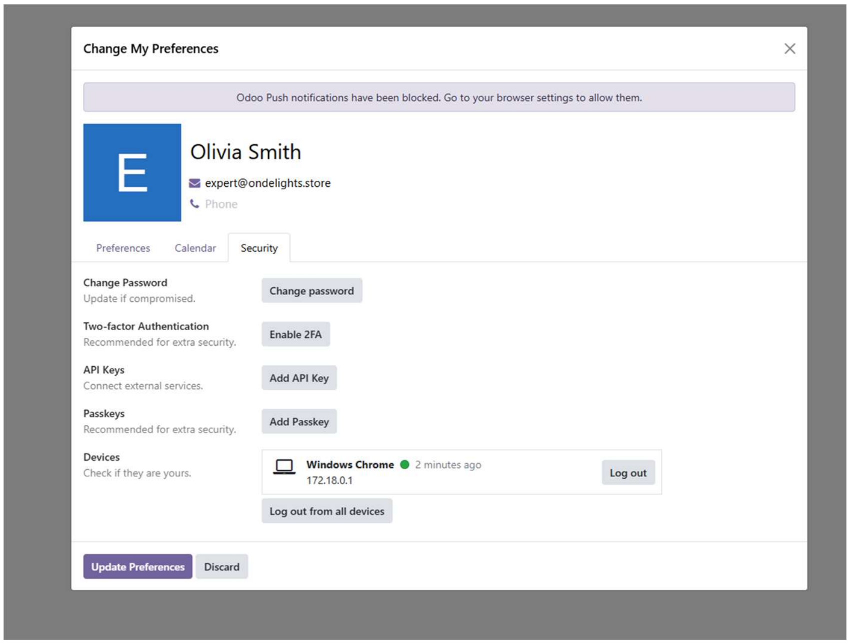
Click on Calendar Tab and change below items:

1. Set your time zone to the location you live now, it will use to set all the meetings based on your timezone and allow you to see the right hours on the calendar



Click on Security Tab and change below items:

1. Click on change password and change your passwords



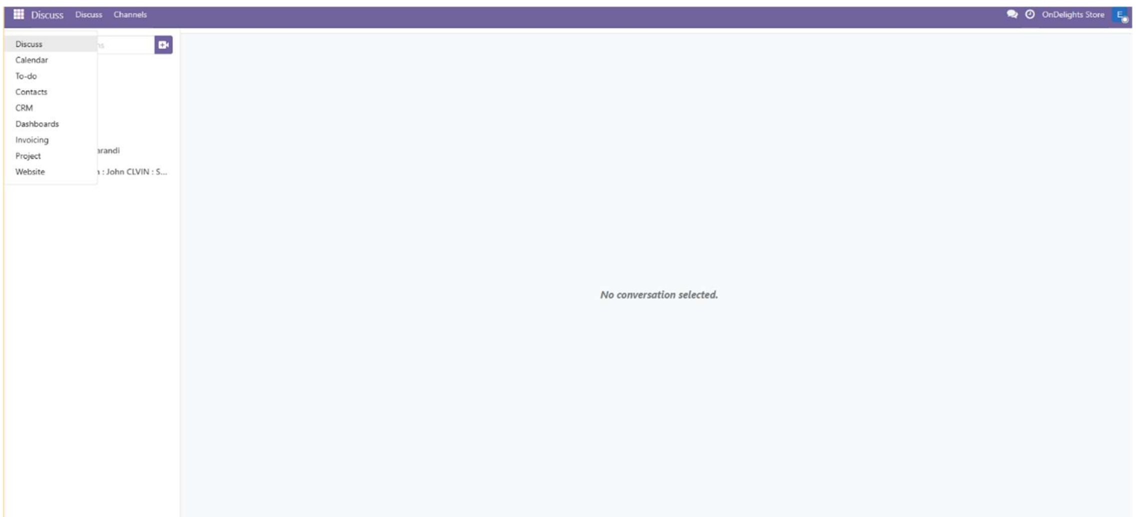
3.Calendar and meetings

The **Calendar** is the central hub for all scheduled meetings within the system. You can view both upcoming and past meetings at a glance. Every booking made in the system is automatically transferred to the Calendar, where you can access and manage all appointments directly through the platform.

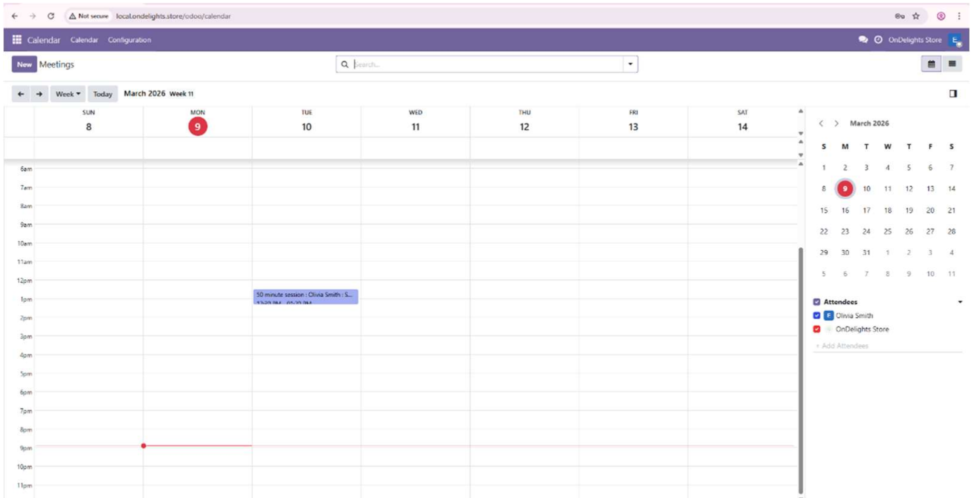
Each meeting is generated automatically by the ERP system and is an end-to-end video meeting—ensuring secure, direct communication between participants. However, to maintain optimal video quality, the maximum number of attendees per meeting is limited to **4 to 5**. Adding more participants may degrade the video experience.

To access the Calendar:

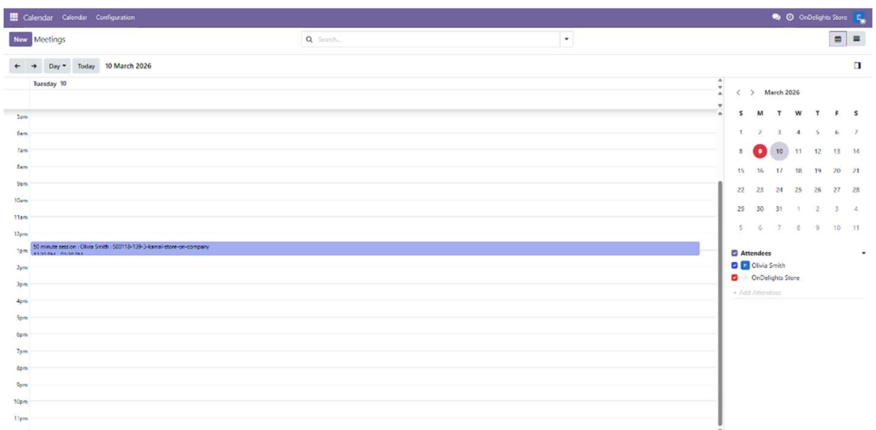
👉 Click on **Calendar** in the top-left menu.



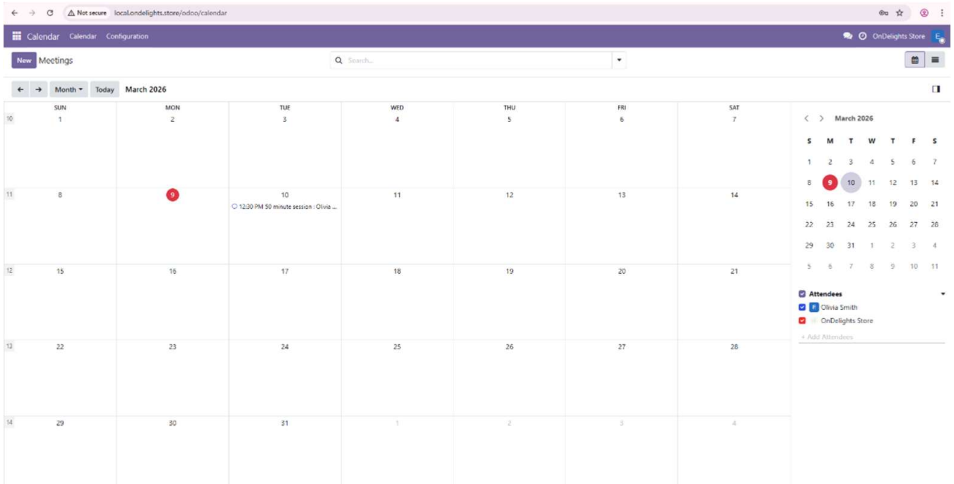
👉 From the dropdown menu, you can switch between weekly, daily, and monthly views.



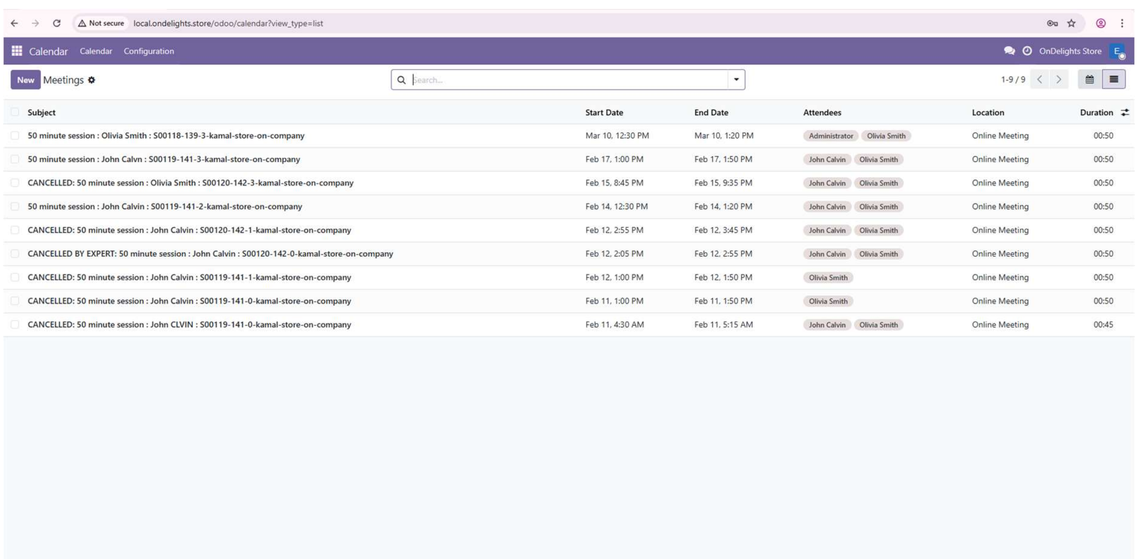
👉 This is daily view



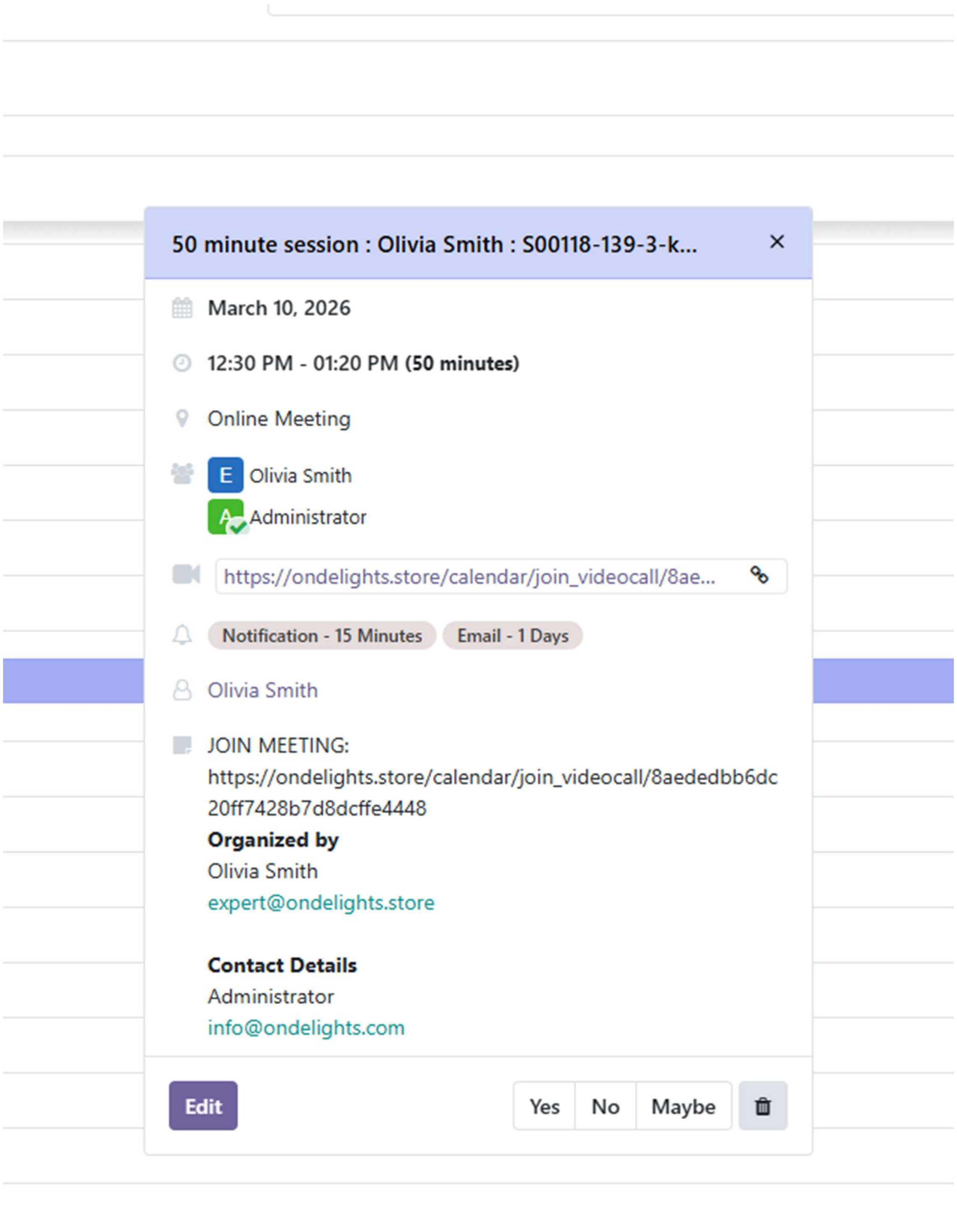
👉 This is monthly view



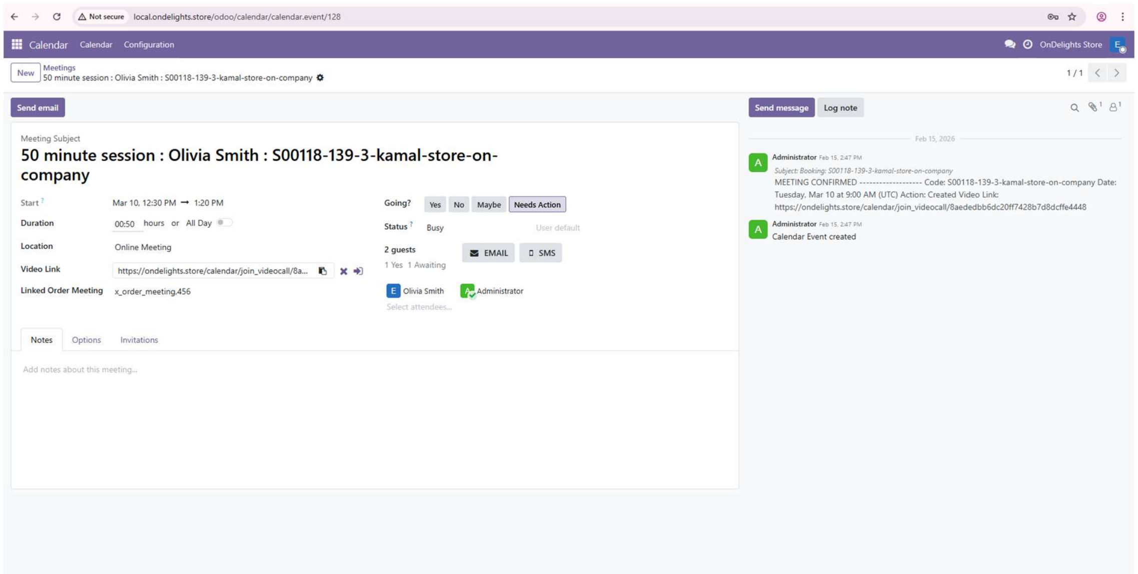
👉 From the right-side menu, click on **List View** to see a simplified list of all meetings.



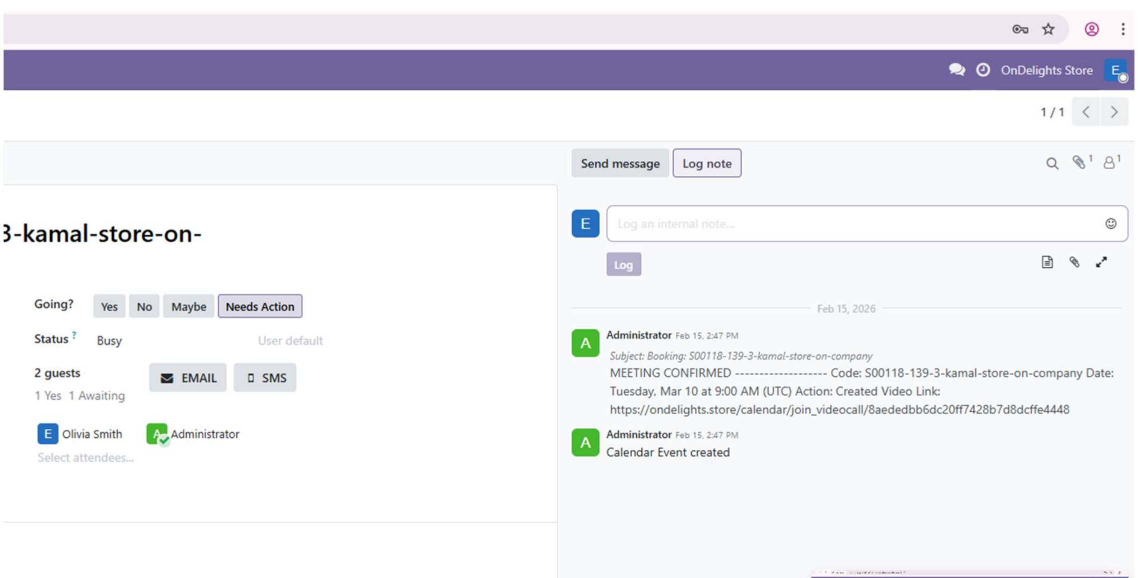
👉 Clicking on any meeting opens a detailed view showing key information such as the meeting time, attendance, and a direct link to the session.


50 minute session : Olivia Smith : S00118-139-3-k...
March 10, 2026
12:30 PM - 01:20 PM (50 minutes)
Online Meeting
Olivia Smith
Administrator
https://ondelights.store/calendar/join_videocall/8ae...
Notification - 15 Minutes
Email - 1 Days
Olivia Smith
JOIN MEETING:
https://ondelights.store/calendar/join_videocall/8aededbb6dc20ff7428b7d8dcffe4448
Organized by
Olivia Smith
expert@ondelights.store
Contact Details
Administrator
info@ondelights.com
Edit
Yes
No
Maybe

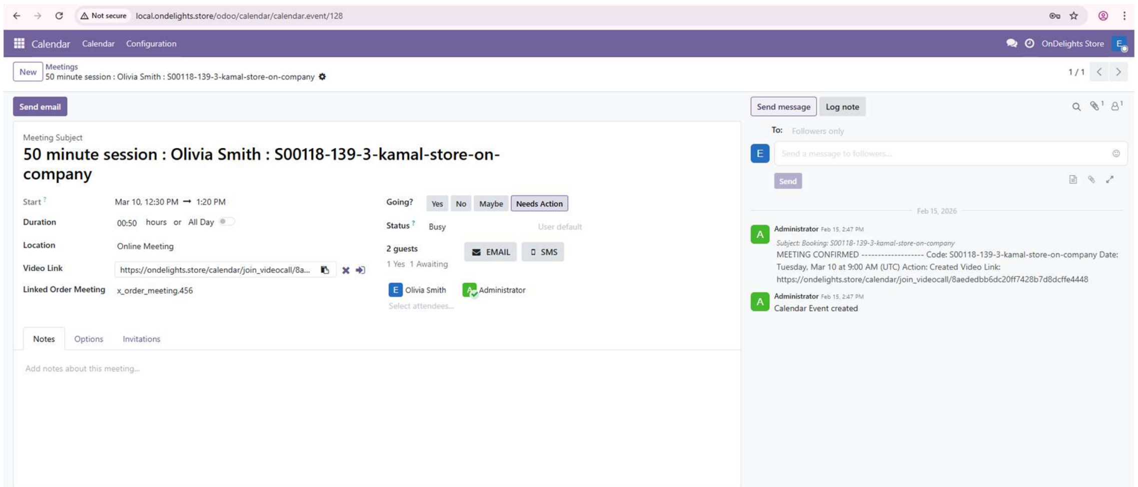
👉 By clicking Edit Meeting, you can view the meeting details and add new attendees directly, if there is more.



👉 On the right panel, click Log Note to add personal notes for your meetings. These notes are stored for record-keeping and are never shared with clients.



👉 If you'd like to send an email related to the meeting to your client—before or after the session—simply click **Send Message** on the right panel, compose your message, and send it directly to the client.



4.Chat, Call and discuss

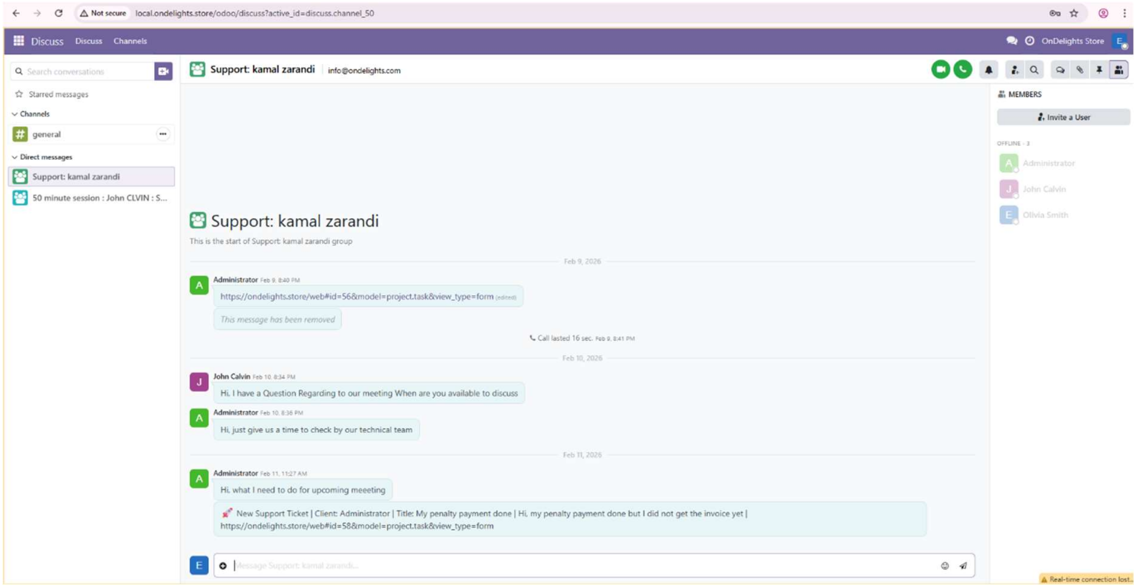
👉 On the left menu, click **Discuss** to access all your chats with clients and team members. You can send messages, engage in real-time conversations, and initiate one-on-one or group chats. Additionally, you can start online voice or video calls directly within the platform to connect seamlessly with your team or clients.

With Discuss, you can:

- ✅ Start real-time chats – Begin one-on-one or group conversations with clients or team members directly from your dashboard.
- ✅ Send messages instantly – Share updates, answers, or reminders in real time, ensuring fast and clear communication.
- ✅ Initiate voice and video calls – Make high-quality, end-to-end encrypted voice or video calls directly from the platform—no need to switch between apps.
- ✅ Engage in both one-on-one and group chats – Hold private discussions with individual clients or collaborate with your team on shared projects.
- ✅ Keep all conversations organized – Every chat is saved in your history, searchable by date, topic, or participant, making it easy to track interactions.
- ✅ Link chats to meetings and contacts – Automatically connect conversations to specific clients or meetings, providing full context for your records.
- ✅ Receive notifications – Get real-time alerts for new messages, incoming calls, or replies—ensuring you never miss an important update.
- ✅ Manage team collaboration – Assign chat threads to team members, track responses, and ensure accountability across your team.
- ✅ Access call logs and participation records – View a complete history of who participated in which calls and when, helping with performance and follow-up.

By integrating chat, voice, and video calls into one unified workspace, Discuss module streamlines communication, improves response times, and strengthens client engagement—all without leaving the platform.

👉 Simply navigate to the Discuss section in the left menu to start chatting, calling, or collaborating with your team and clients instantly.



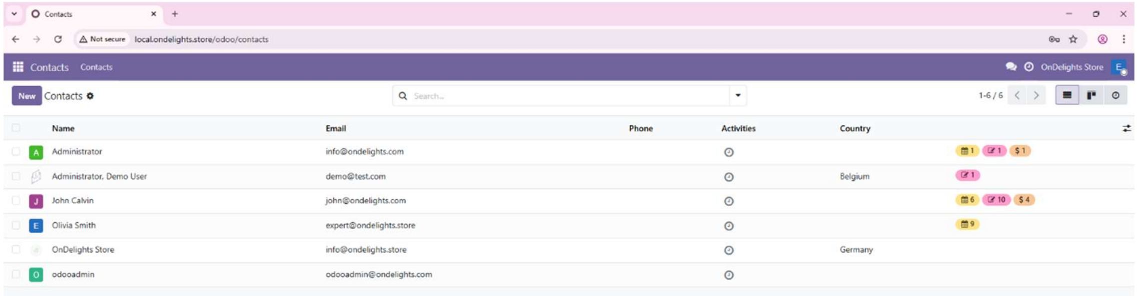
5.Contact management system

👉 Contact is a central hub where you can add, manage, and organize clients and key individuals associated with your business. This system allows you to store and maintain complete contact information—including name, email, phone, company, and preferences—making it easy to keep all your relationships in one place.

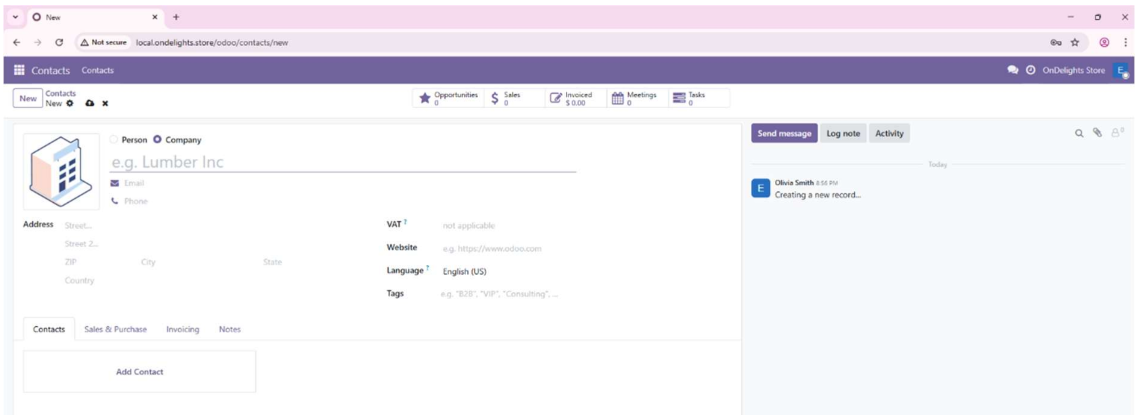
With the Contact system, you can:

- ✅ Send personalized messages and updates directly to clients
- ✅ Store detailed notes and interaction history for each contact
- ✅ Create and manage follow-up tasks or reminders
- ✅ Save and segment contacts (e.g., by status, interest, or industry) for better targeting
- ✅ Share or export contact lists for team collaboration or reporting
- ✅ Send targeted offers, promotions, or product recommendations at the right time
- ✅ Track engagement history to identify client behavior and preferences
- ✅ Enable lead scoring or tagging to prioritize high-value opportunities

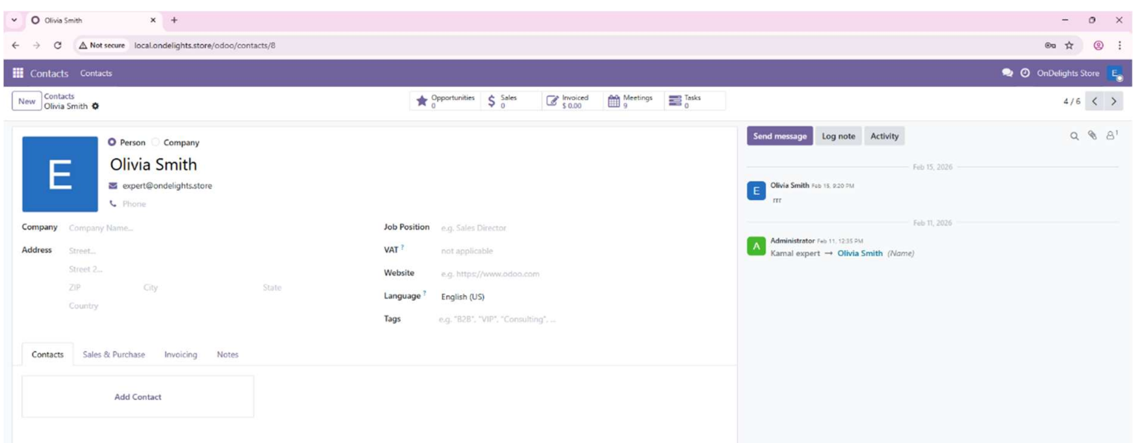
By centralizing your client data, the Contact system helps you stay proactive, organized, and responsive—ensuring consistent communication and stronger relationships over time.



👉 By clicking New, you can quickly add a new contact to the system with just a few details—ensuring your client information is captured and organized from the start.



👉 By clicking on any contact, you can also edit its information at any time—ensuring your data stays accurate and up to date.



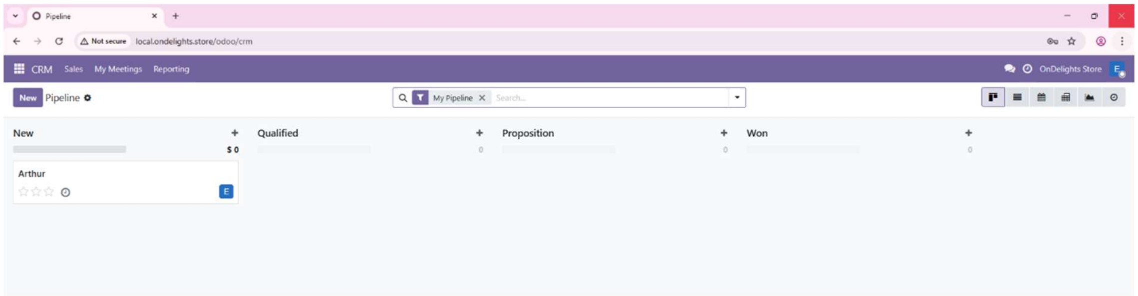
6.CRM

In the world of mental health, trust, empathy, and consistency are at the core of every client relationship. A well-organized CRM system helps psychologists and mental health professionals nurture these values by providing a secure, respectful, and structured way to manage client interactions—ensuring care is consistent, thoughtful, and always client-centered.

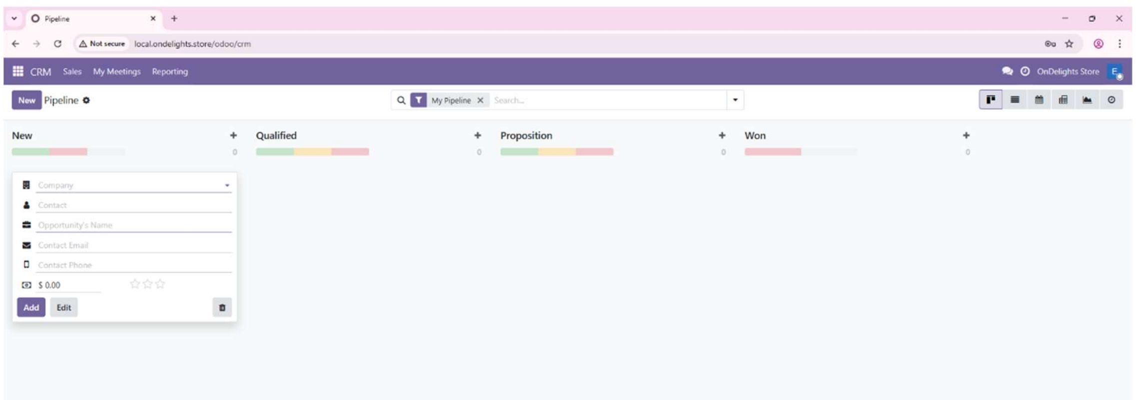
Key Features:

- ✅ **Client Profile Management**
  Create comprehensive, secure profiles for each client—including personal background, therapeutic goals, preferred communication methods, and history of treatment.
- ✅ **Secure & Confident Communication Tracking**
  Log every interaction—whether it's a phone call, email, or in-person session—within a private, client-specific record. Each note is contextual, respectful, and helps maintain a clear, ongoing history of care.
- ✅ **Appointment & Session Management**
  Effortlessly schedule, track, and manage therapy sessions. View upcoming appointments, session types, and client progress—ensuring you stay organized and responsive to each client's needs.
- ✅ **Therapy Goal Tracking & Progress Notes**
  Set personalized goals with clients and monitor progress over time. Use the CRM to record therapeutic milestones, emotional shifts, and client reflections—supporting continuity and informed decision-making.
- ✅ **Secure Communication & Follow-Up Reminders**
  Receive timely alerts for upcoming sessions, follow-up calls, or important messages—so you never miss a moment of care. All interactions remain within a private, confidential space.
- ✅ **Client Journey & Well-Being Insights**
  Map each client's journey from first contact to ongoing care. Use insights from interaction history to better understand needs, adjust approaches, and strengthen therapeutic relationships.

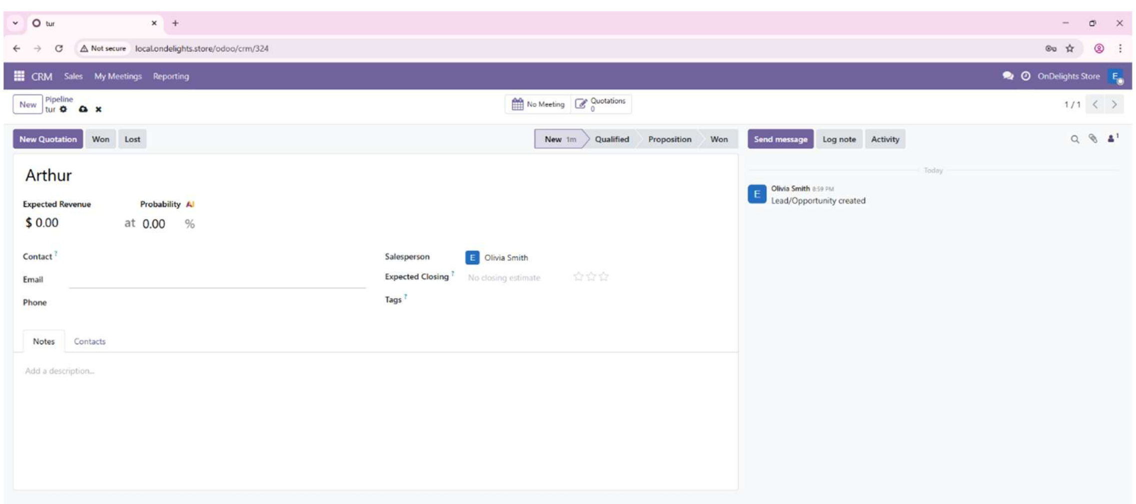
👉 Click on the left menu and select CRM to access the system. You will see all the leads created by you or assigned to you.



👉 By clicking “New,” you can create a new lead in the system.



👉 By clicking on each lead you can edit them in the system.



🔍 What Is an Activity?

In ERP, an Activity is a digital task or action that you or your team plan to take with a lead (such as a potential client, opportunity, or new contact).

Think of it as a smart, digital to-do list that's tied directly to a specific lead—and includes details like:

- What action you need to take
- When you need to do it (a deadline)
- Who is responsible (you or a team member)

Activities are not just notes—they're planned, scheduled, and tracked actions that keep your workflow moving smoothly.

🚀 How Activities Help You Manage Leads

Managing leads—especially in a practice like psychology, coaching, or consulting—can be busy and complex. You might have dozens of new contacts, and it's easy to forget follow-ups, miss deadlines, or lose track of which leads need attention.

Activities solve this by giving you a clear, organized, and real-time way to manage every step of your lead journey.

Here's how it helps in real-life situations:

✅ 1. Never Miss a Follow-Up Again

You can't always remember when to call a client or send an email. With Activities, you set a deadline—like "Send a follow-up email on Monday" or "Call client on Thursday."

- ➡️ The system reminds you automatically.
- ➡️ You don't have to rely on memory or spreadsheets.

Example:

You meet a new client on Monday. You create an activity to send a welcome email by Friday. System shows it in your list, and you get a gentle reminder—so you don't forget.

✅ 2. Keep Your Workflow Organized by Priority

Not all leads are the same. Some need quick follow-ups, others might take time.

With Activities, you can:

- Set different deadlines (today, next week, in 30 days)
- Assign tasks based on lead importance

- Sort your list by due date, activity type, or lead status
- This helps you prioritize your work—focusing on urgent or high-potential leads first.

✅ 3. Track Every Step of the Lead Journey

From the first contact to the final decision, each interaction is captured as an activity.

This means you can see:

- What you did with each lead
- When you did it
- Who did it (if assigned)
- Whether it was completed or still pending

This creates a complete, transparent history—like a digital diary of your client interactions—without needing extra tools or paperwork.

✅ 4. Assign Tasks to Your Team (Team Collaboration)

You don't have to do everything alone.

If a lead needs a meeting with a specialist, or a follow-up with a team member, you can:

- Create an activity and assign it to a colleague
- Set a deadline and track progress
- See who's responsible and when it's due

This improves teamwork, ensures accountability, and helps spread workload fairly.

✅ 5. Turn Routine Tasks into a Digital Workflow

Instead of just "noting" things in a notebook or email, you now:

- Create a scheduled task
- Set a clear action (e.g., "Call client")
- Link it to a lead
- See it in your dashboard

This makes your daily work more structured, repeatable, and professional—like a well-run practice with clear processes.

🎯 **Real-World Example: Managing a New Client Lead**

Let's say you're a psychologist and you meet a new potential client:

First Meeting – You meet the client on Tuesday.

2. → You create an activity: "Send a follow-up email with next steps", due on Thursday.

Follow-Up – You send the email.

3. → You mark the activity as "Done" in System.

   Next Step – You realize the client wants to schedule a session.

4. → You create a new activity: "Schedule a 30-minute session for Friday", assigned to your assistant.

5. Check Your Activity List – Every day, you open the Activity list and see:
   - What's due today
   - What's due next week
   - Who is responsible

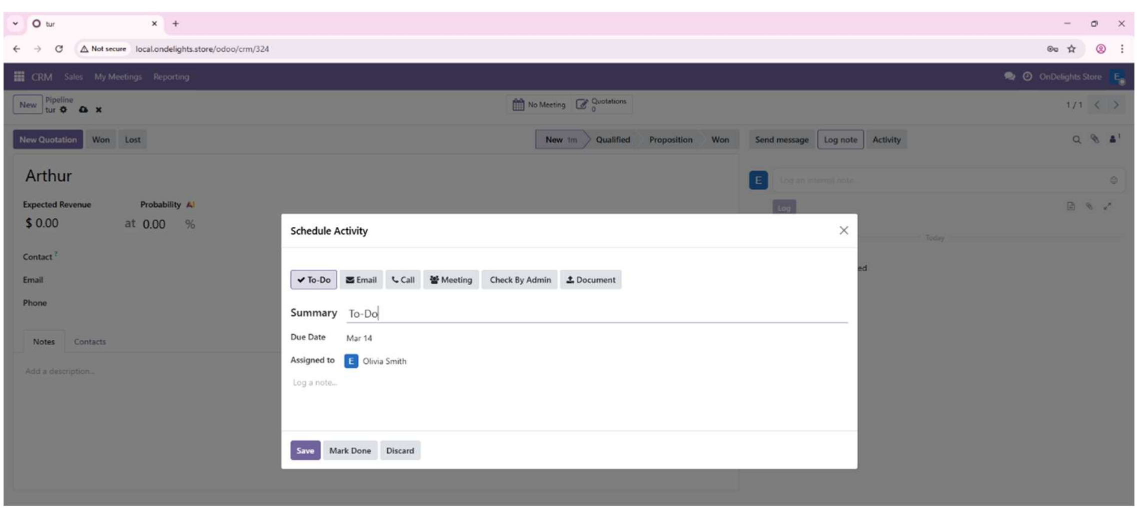
You know exactly what to do, when to do it, and who to involve.

- ✅ No more missing calls.
- ✅ No more "I didn't remember" moments.
- ✅ Everything is visible, tracked, and ready to act on.

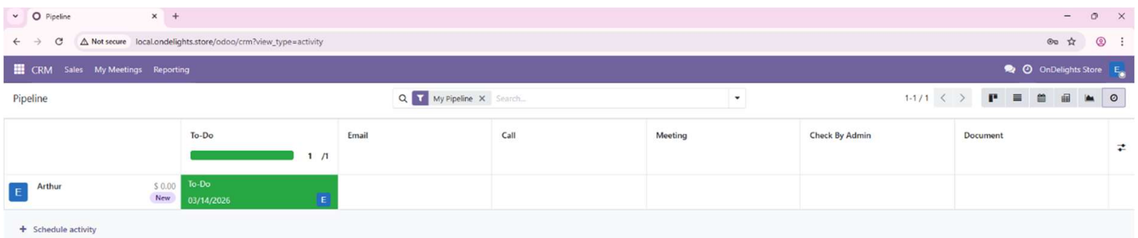
👉 **To schedule an activity, click on "Activity" on the right side of your screen.**

- In the new window, select the Activity Type (e.g., Call, Email, Meeting, Follow-up).
- Then, note down what action you'd like to take (e.g., "Send welcome email" or "Schedule a session").
- Set a deadline for when the task should be completed.
- Finally, choose the person responsible for carrying out the action—whether it's yourself or a team member.

Once all details are filled, save the activity and it will appear in your Activity list for easy tracking.



👉 By clicking on the Activity list view, you can see all activities you or your colleague have scheduled—either manually or automatically. Activities are color-coded to indicate status: green means the deadline has not been passed, yellow indicates the deadline is approaching, and red shows the deadline has already passed.



7. Project management

🎯 What is Project Management?

Project management helps psychologists plan, organize, and deliver services—like therapy sessions, assessments, or training programs—on time, with care, and in a way that supports both client well-being and practice sustainability.

Whether you're running a new therapy program, launching a telehealth service, or managing a client case, project management ensures you stay structured, focused, and responsive—without losing the human touch.

✅ Real-World Example 1: Launching a New Therapy Program

- 📌 Project Goal: Start a 12-week anxiety support program for adults.
  - 🔹 Key Steps in Project Management:
    - Define the Project Scope
      - → What will be offered? (e.g., 12 weekly online sessions, weekly check-ins, guided journaling)
      - → Who is it for? (Adults aged 18–45 with mild-to-moderate anxiety)
      - → When? (Start: June 1, end: July 30)
    - Create a Project Plan

- → Break it into manageable tasks:
  - Finalize session structure (Week 1)
  - Design session materials (e.g., handouts, worksheets) (Week 2)
  - Send out client invitations (Week 3)
  - Schedule and prepare Zoom links (Week 4)
  - Conduct weekly check-ins with clients (Weeks 5–12)

▪ Assign Responsibilities
- → You (psychologist): Lead sessions, manage client records, and provide support.
- → Admin (if applicable): Handle sign-ups and reminders.

▪ Track Progress
- → Use a simple tracker to see:
  - How many clients have signed up
  - Which sessions are live
  - Which clients are showing progress

▪ Communicate with Clients
- → Send a welcome email:

▪ Close the Project
- → After completion:

"All 12 sessions completed. 8 clients reported improved sleep and reduced worry. Next steps: Offer a 3-month follow-up option for continued support."

✅ Real-World Example 2: Managing a Client Case (e.g., Post-Trauma Recovery)

- 📌 Project Goal: Support a client through a 6-week recovery plan after a traumatic event.
  - 🔹 Key Steps:
    - Set Clear Goals
      - → Reduce anxiety symptoms
      - → Improve sleep quality
      - → Build daily coping routines
    - Plan Weekly Sessions
      - → Use a session template:
        - Week 1: Safety & grounding techniques
        - Week 2: Identify triggers
        - Week 3–4: Journaling & mindfulness
        - Week 5–6: Action planning & self-care
    - Track Progress

- → Log notes after each session:

  "Client reports feeling more in control. Sleep improved from 3 nights/week to 5. No new flashbacks. Client agrees to continue with mindfulness practice." Send a Supportive Message

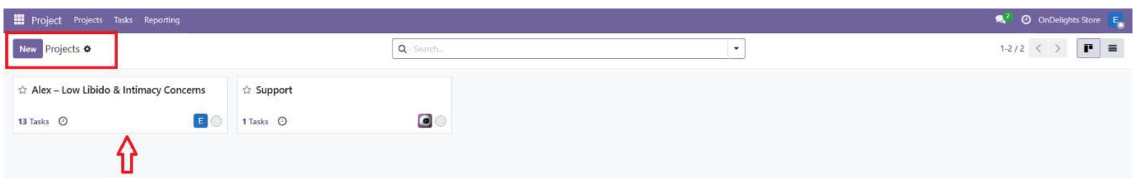
- → After Week 4: Send an email

▪ Close the Case

- → Final summary:

  "Client completed 6 sessions. Anxiety levels decreased by 40%. Recommended 1:1 check-in every 3 months to maintain progress."

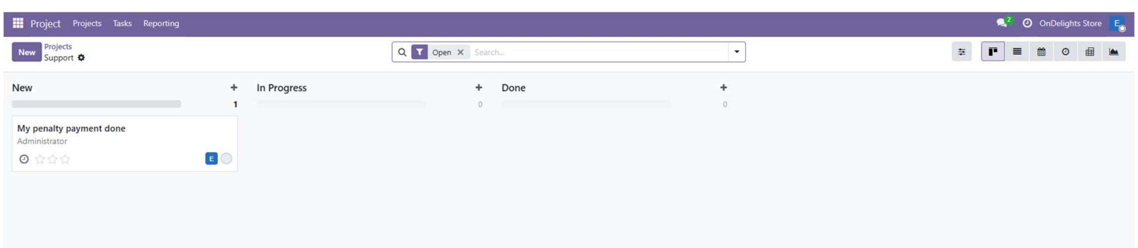
From the left menu, click on "Project" to view a list of currently active projects. Also, you are able to click on new and create a new project too.



2There is a default "Support" project that automatically handles all incoming support tickets. Whenever a support ticket is sent to you, a new task is created within this Support project. You will need to respond to the ticket, resolve the issue, and close the task once completed.

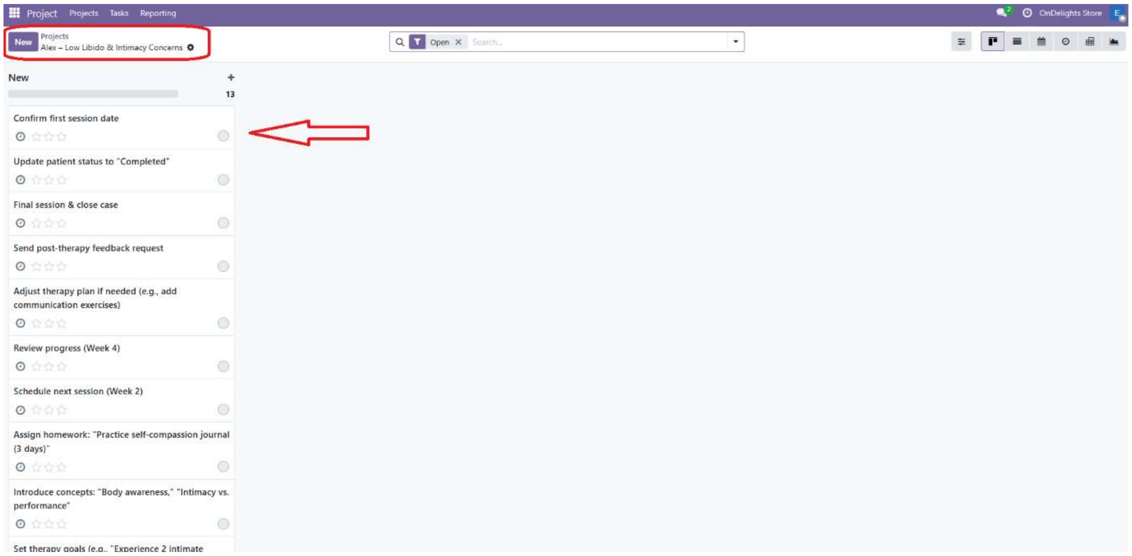
By clicking on any project in the left menu, you will see the list of tasks assigned to that project.

Support ticket:



Other projects:

You are able click on new and create a new task.



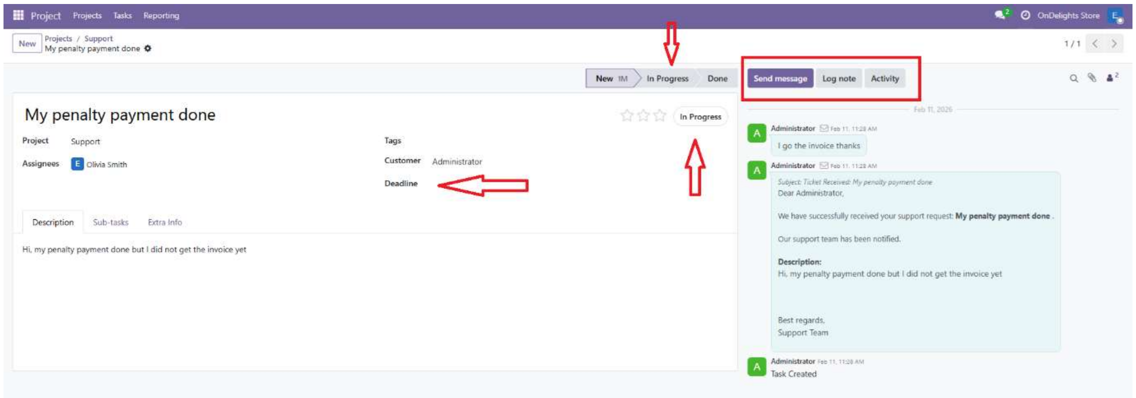
By Click on each task you will move to task detail.

The same all other place of ERP you can send email messages to all followers, log notes, and schedule activities directly within a task—ensuring seamless coordination and real-time updates throughout the project lifecycle.

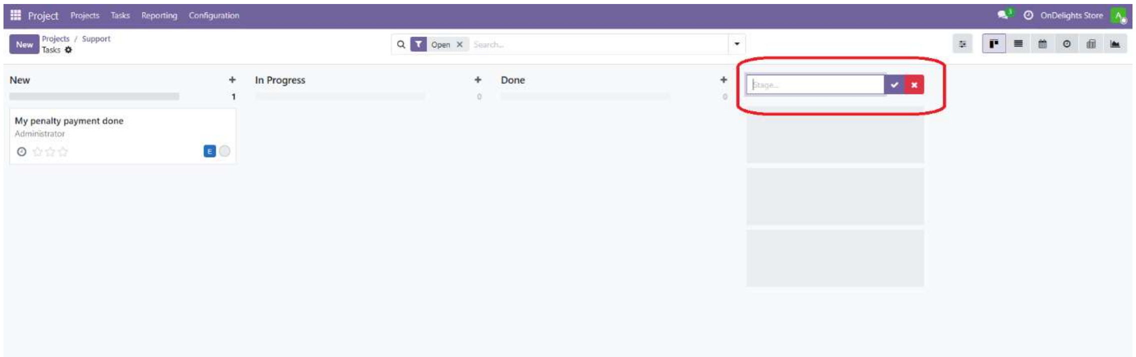
On each task, you can also:

- Update the task status
- Modify the deadline
- Reassign the task to another team member
- Change the status (e.g., from "In Progress" to "Completed")

This gives you full control and visibility to manage tasks efficiently and keep all team members aligned.



On the task list you could create a new pipeline for your project.

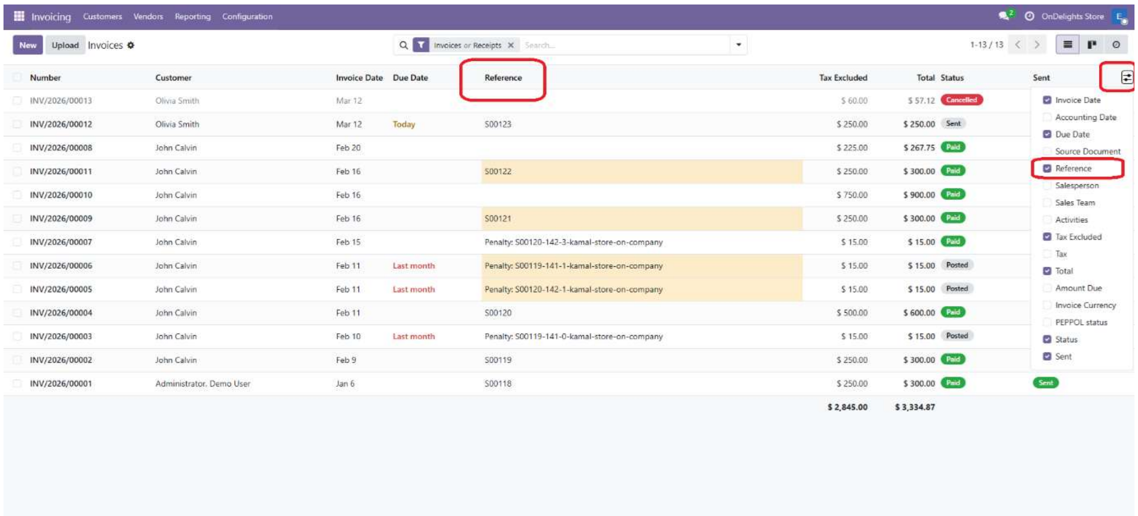


8.Invoicing

Invoice is the central component of the system for managing payments, approving invoices, and handling late payment penalties.

- Whenever a client purchases a product, an invoice is automatically generated and becomes part of the payment workflow.
- Each invoice must be approved before it can be marked as paid—ensuring accuracy and control over financial transactions.
- If a client cancels a scheduled meeting late, a penalty invoice is automatically generated to reflect the late cancellation fee.
- Additionally, if you'd like to offer extra services or products beyond your core offerings, you can create a manual invoice and send it directly to the client for payment.

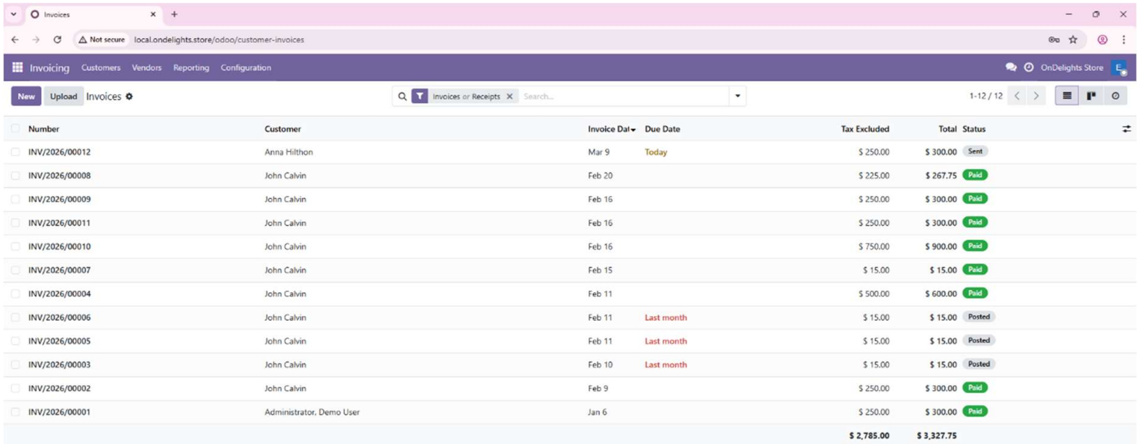
👉 By clicking on the left menu and selecting "Invoices", you can view a list of all invoices created in the system, along with their current status.
The first step is enabling the Reference column to easily identify which invoices have been paid.



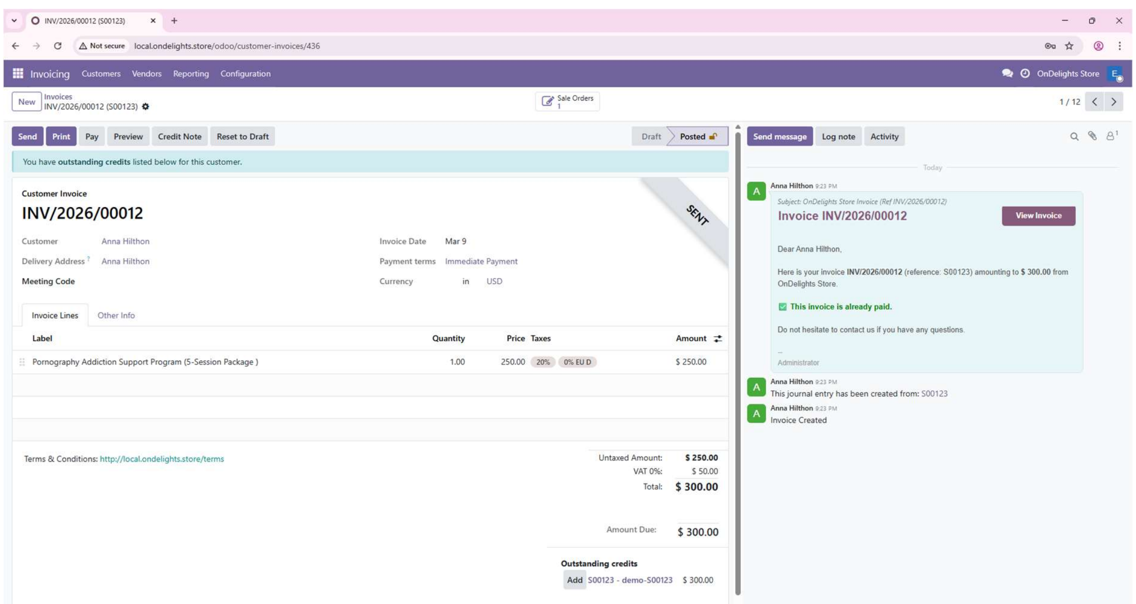
Then, for invoices with the status "Sent" and a valid reference number, it means the invoice has been successfully processed and is linked to an online payment made by the client.

To verify the payment:

1. Click on the invoice row in the list.
2. Check the payment details in the Stripe panel.
3. Confirm that the funds have been successfully received and are reflected in your Stripe account.



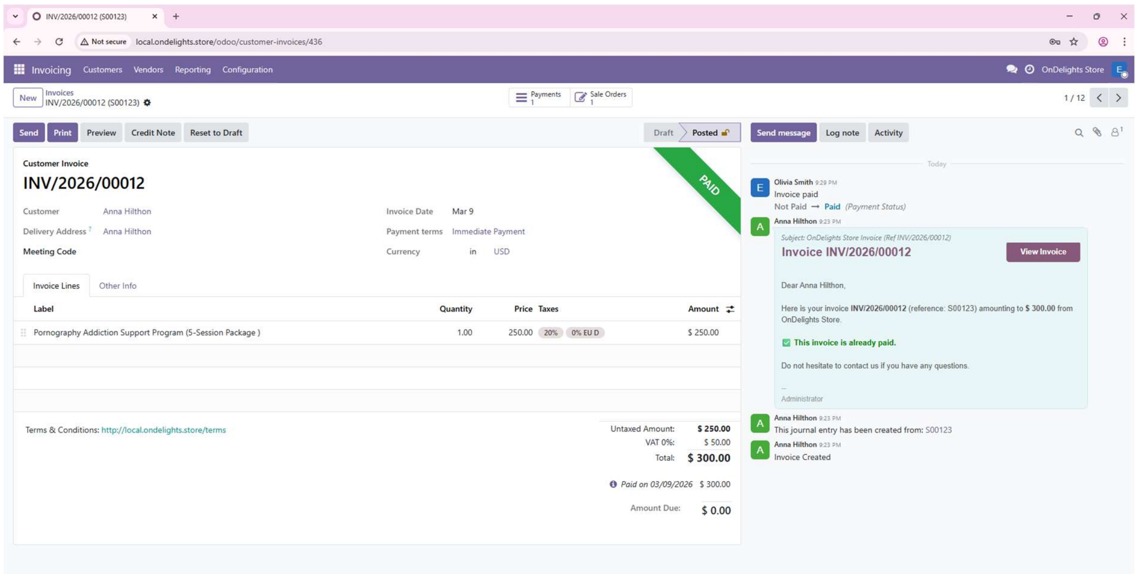
If you’ve received the payment into your account, an Outstanding Credit will automatically appear on the invoice.



To complete the payment process:

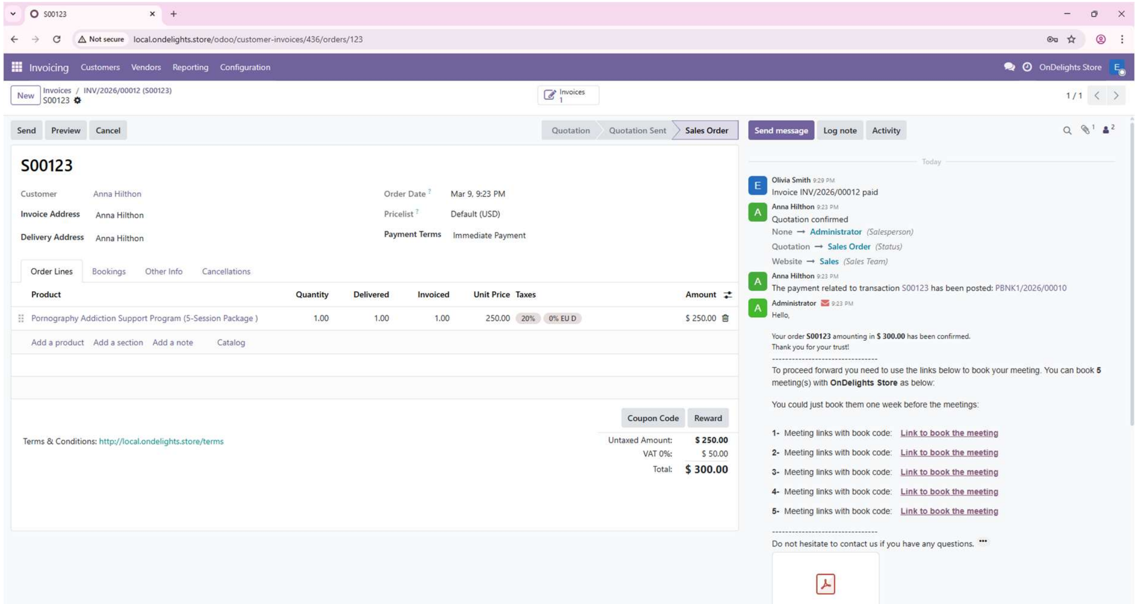
1. Click on the invoice row to open it.
2. Click "Add" to manually add the credit amount.
3. The credit will be applied to the invoice, and the status will update from "Sent" or "Outstanding" to "Paid".

This ensures your invoice is accurately reflected in the system and your financial records are up to date.

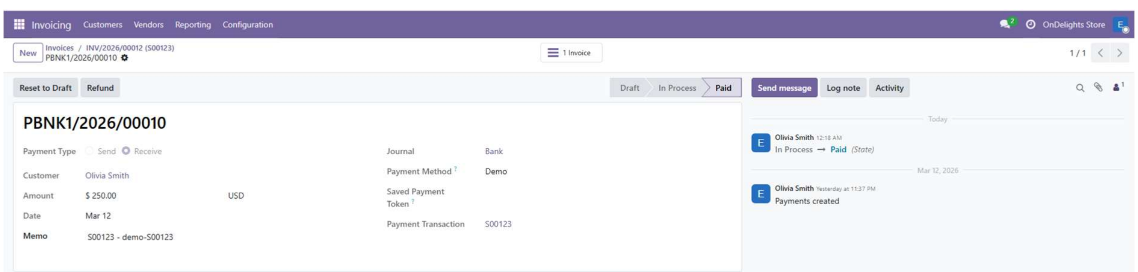


At the top of the page, you’ll find a link to "Sales Order". Clicking it will display the full sales order details, including the scheduled meeting links that have been generated and sent to the client.

These meeting links are automatically shared with the client to ensure they can easily access and attend their sessions.



By clicking on Payments, you can view all the payment details submitted by clients, including transaction dates, amounts, and payment methods. This provides a clear and complete overview of all client payments within the system.



Just like in any other system, you can send a direct message to a client's email, log note on the platform or schedule activity from within an invoice—no need to switch tabs or leave the interface.

✅ Real-World Example 1: Sending an Invoice Email

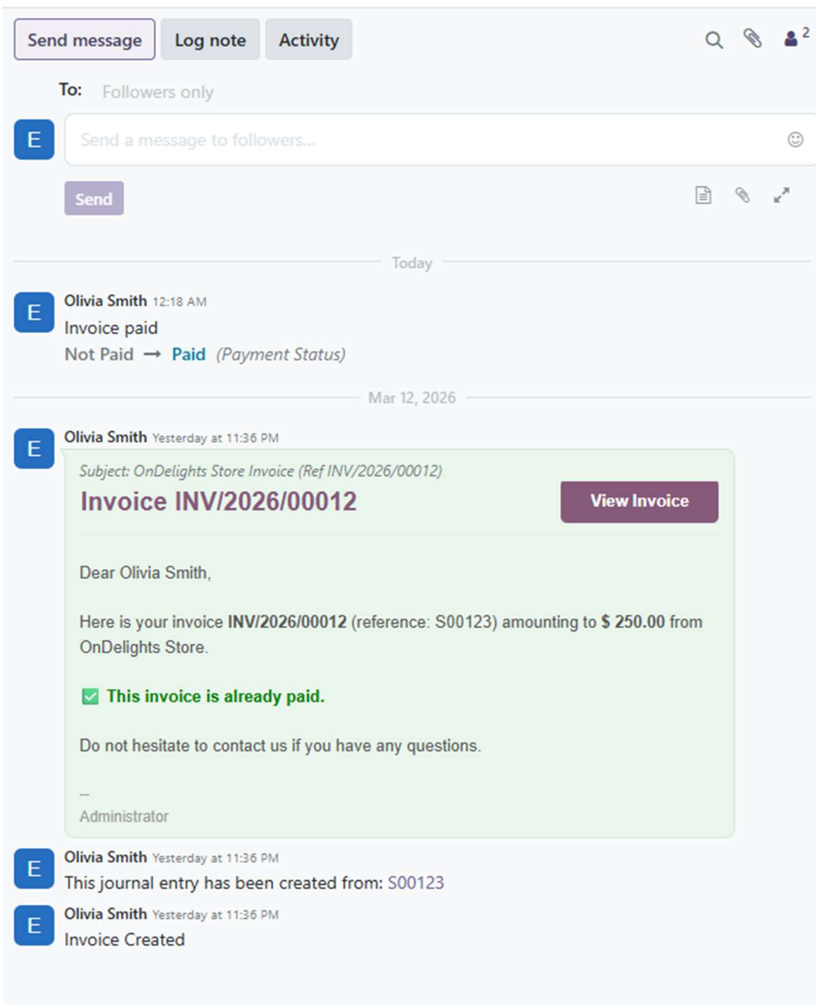
A client hasn't paid a therapy session invoice. 📧 Email you can send directly from the invoice

✅ Real-World Example 2: Logging a Note on an Invoice

A client has paid, and you want to confirm the status and update your record. Note you can add directly to the invoice

✅ Real-World Example 3: Scheduling a Follow-Up Activity

A client hasn't responded to an invoice, and you want to follow up in 3 days. Activity you can schedule directly on the invoice



9.Orders management

The Order Management System in the ERP platform provides a centralized, real-time view of all eCommerce orders generated through your website. Accessible via Website > eCommerce > Orders, this dashboard gives you full visibility into customer activity, enabling efficient monitoring and management of all sales and bookings.

- What products or services customers have purchased
- What items were added to their shopping basket (even if not completed)

For paid orders, the system automatically links to the number of sessions required to book

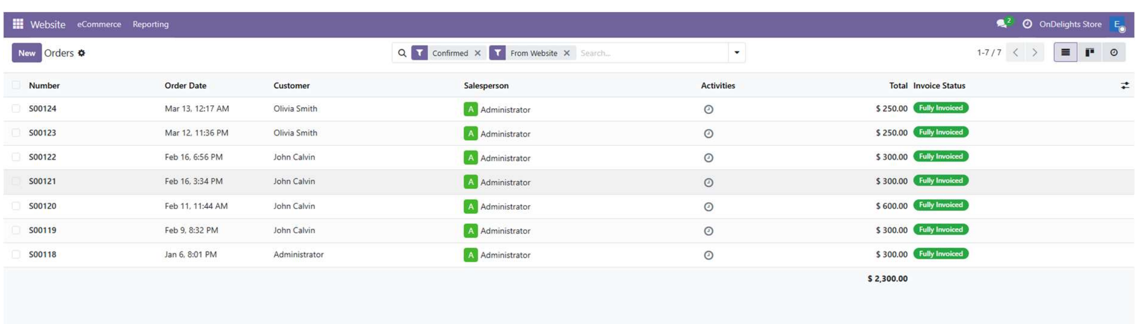
You can then monitor the booked sessions associated with each order, ensuring seamless tracking of customer engagement and service delivery.

📋 Order Status Visibility (From Search Results):

Each order displays its current status, including:

- Pending – Order placed but not yet processed
- Paid – Customer has completed payment
- Processing – Order is being fulfilled
- Completed – Order has been delivered or fulfilled

This status helps you track the lifecycle of each order at a glance and ensures no order slips through the cracks.



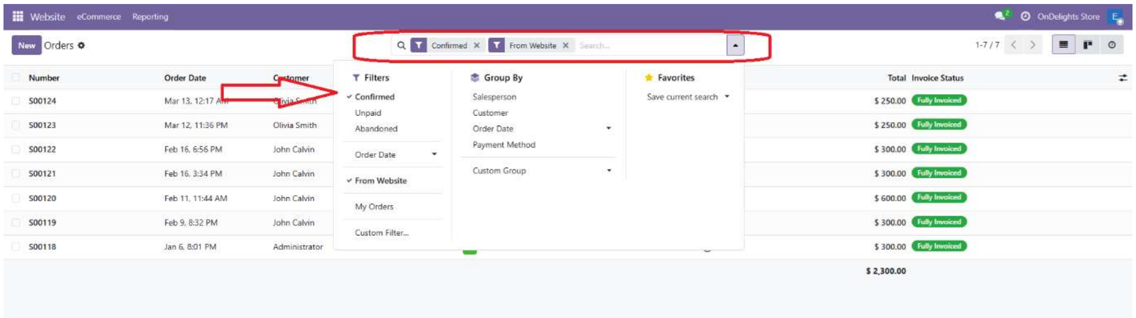
Number	Order Date	Customer	Salesperson	Activities	Total	Invoice Status
S00124	Mar 13, 12:17 AM	Olivia Smith	Administrator		$ 250.00	Fully Invoiced
S00123	Mar 12, 11:36 PM	Olivia Smith	Administrator		$ 250.00	Fully Invoiced
S00122	Feb 16, 6:56 PM	John Calvin	Administrator		$ 300.00	Fully Invoiced
S00121	Feb 16, 3:34 PM	John Calvin	Administrator		$ 300.00	Fully Invoiced
S00120	Feb 11, 11:44 AM	John Calvin	Administrator		$ 600.00	Fully Invoiced
S00119	Feb 9, 8:32 PM	John Calvin	Administrator		$ 300.00	Fully Invoiced
S00118	Jan 6, 8:01 PM	Administrator	Administrator		$ 300.00	Fully Invoiced
					$ 2,300.00	

You can freely search and filter orders by:

- Customer name
- Order date
- Product category
- Payment status
- Booking status

- Invoice number

This allows quick identification of specific orders, whether for follow-up, reporting, or financial review.



By click on each row you could see order details

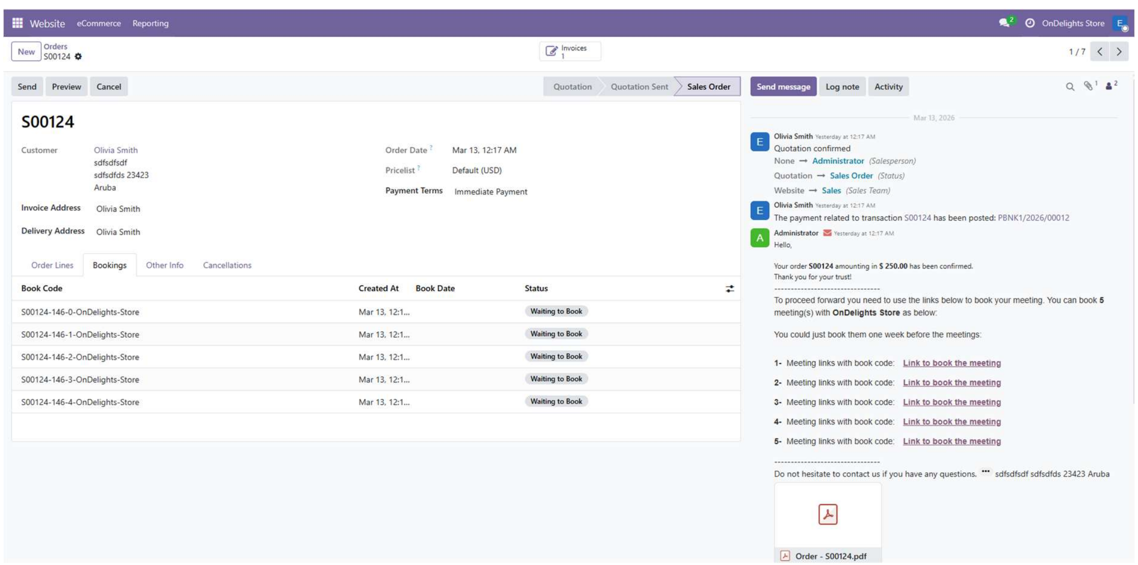
Additionally, there is a dedicated Cancellation tab that displays all client or expert meeting cancellations, along with the applicable penalties applied to the customers.

On the right panel, you'll find a detailed history of:

- Payment records
- Booked sessions

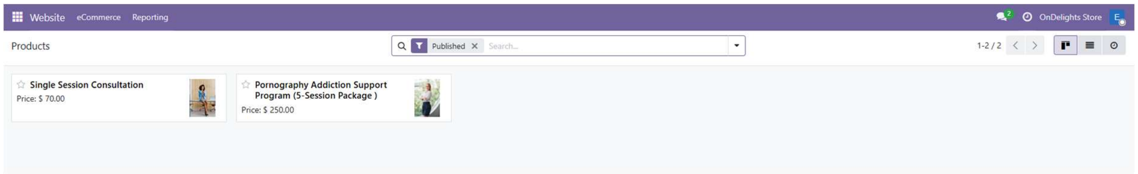
Just like in other parts of the ERP, you can now:

- Send messages to customers
- Log notes
- Schedule follow-up activities



10.Products management

On the Website menu then eComerce then product, you could see the product management page, we add your current products to the platform, you could check the current products we added to the system on the list.



You can click on any product to view its detailed information. Before finalizing any changes, we kindly ask that you thoroughly review all product details and confirm whether any adjustments are needed.

🔍 Key Product Details to Review:

- Product Title & Price:
  - Check the product title (must be accurate and reflective of the service offered).
  - Verify the listed price — ensure it aligns with your pricing strategy.
- Tax Settings
  - Confirm the tax role applied in your country (e.g., standard, reduced, exempt) on the first tab of the product.
  - This ensures compliance with local tax regulations and correct invoicing.
- Sales & Description Section
  - Review the product description and all related information on the Sales tab.
  - Ensure all content is accurate, clear, and reflects the actual service or offering.
- Product Information (Final Section)
  - Pay special attention to the following:
  - Number of Online Bookings
  - Penalty rules (if any)
  - These settings are critical and must match your business expectations.
- Pricing Alignment:

  Make sure the number of sessions included in the package exactly matches the price defined in the system.

- Revenue Split:

  Please note that in all cases, 80% of the revenue will be retained by you, and 20% will be shared with us.

📌 If you would like to add new products or make any edits to existing ones, please send us an official email with your request.

⚠️ Important Note:

Once a package has been legally purchased by a client, no changes can be made. You must deliver the service as agreed — any modifications after purchase will violate the terms of the agreement and may result in disputes.

We will review and approve any changes promptly, but all modifications must be made before any purchase is finalized.