BeAPP 2022

Instruction Manual V1.2

SYSTEM ADMIN Section 1
[Release 17042022]

BeAPP: System Admin Manual REV 1.2

Overview.

The **BeAPP** is generally quite intuitive to operate. Simple inputs are self-explanatory, but for the sake of completeness, this small manual explains most of the essentials for creating new CPI's from customer requests.
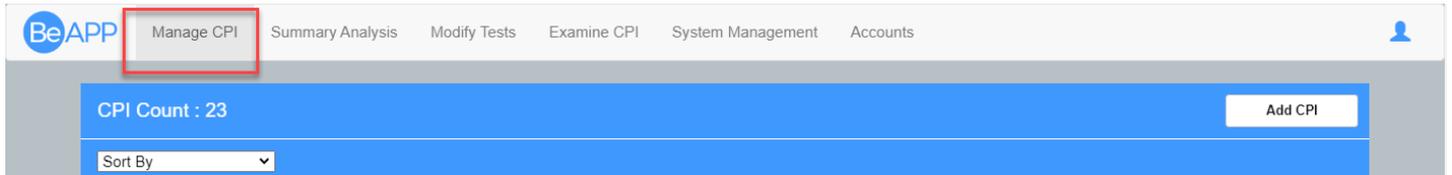
Creating a CPI

Once the Website order has been received, then the associated CPI account can be created.
It is a simple process with validation at completion.

■■■ One KEY point is that **emails form the basis of the BeLOGIN system**, so checking that the email provided is correct before saving is a key takeaway! If the email is incorrect the BeLOGIN request to validate email before users can enter the BeLOGIN system won't work as an email is sent in the validation process.

Editing of any created CPI can be performed as required, except changing the email address- this has been set and issued by the Login System.

To edit the email address the BeLOGIN system will need to be used - typically though this is a user's responsibility.

Note that in a fully working system the email address will come from the Website where the product was purchased - so changes will be initiated from there to ensure billing/product ownership is correct...

CPI setup [ADD CPI].

Once logged in as Admin you'll go to the **Manage CPI** menu.
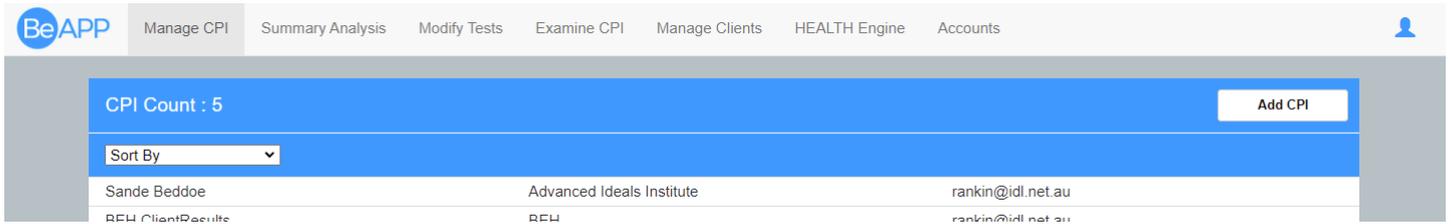
Clicking on the **Add CPI** button presents the required popup.

* Add CPI

Streamlined details provide a fast setup. Other detailed information will be gleaned in new onboarding questionnaires on the eCommerce Website. This information will be accessible by BeAPP via an API when needed. Information such as medical conditions, subscription status and supplements that are being used…

The main fields of interest are shown in the image below.

New CPI Options (Admin)

It should be noted that all of these additional manual steps will be replaced by a fully automated BeAPP creation process on the new website. Options for each product will be user/cost selectable from which a new CPI is set up accordingly.

Allowed Number of Clients

Until the system is operated fully from the website, this option is related to the package type purchased but for now, it's a manual entry. The number of allowable Clients includes the CPI owner also. Again this depends on the product definition as do all aspects that are configurable.

- Typically A base home user kit will be allocated 5, a pro system 200.

CPI Type

There are a variety of CPI Types, these again would be set from the website so are manual at this stage of app development. The names may be further expanded, but for the moment this is just used for internal control identification processes. They control what the CPI owner can provide to themselves and their clients.

- Pro Level 1 - Pro Level 6

For ease of use 'Pro Level 1' allows for any option to be selected.

CPI Type	Zone	WTX Panel	Summary Analysis	7 Test	Note
Pro Level 1	Y	Y	Y	Y	TBA
Pro Level 2	Y	Y	N	Y	TBA
Pro Level 3	N	Y	N	Y	TBA
Pro Level 4	N	Y	N	N	TBA
Pro Level 5	N	N	N	Y	TBA
Pro Level 6	N	N	N	N	TBA

In an example, a new CPI is created with **Pro Level 4**. This means they can only access **WTX Panel** toggling for their clients and for their CPI. Nothing else is enabled.

■ Share Email

The Share Email is more of an internal mechanism related to the first choice a CPI owner makes initially on the Website. As the system is manual, this is only recorded internally for privacy reasons.
The Actual sharing is initiated by the CPI owner once they receive their empty CPI. As they add themselves, family members or the like the decision to apply sharing to each is done then.

The Practitioner emails are entered and then **Check** is clicked. A **CPI ID** must appear otherwise the email is not known to the system or mistyped.

Note: If not entered or not found, CPI generation can still proceed, but without the first choice Practitioner assigned as it can be on the website. Again this is just for completeness in terms of the BeAPP and Website sale relationship.

■ CPI Options

Again, these would be options set up by the product purchase on the website - so until the new site is commissioned these are manual options.

Zone   - Turns on the Zone Chart Option
WTX Panel   - Turns on/off the WTX Panel
Summary Analysis   - Turns on the Summary Analysis Report functionality
7 Number Test   - Turns on 7 Number Testing

Once all fields are correctly filled out and checked, Clicking **Save** will provide an appropriate message.
Note: if the email address is already used the process will fail.

The **Login Details** for the customer are created in the system and an email is sent to the activations@balanceenergyaustralia.com with the information which can then be distributed as required.

CPI setup [EDIT CPI].

Editing a CPI is as before. Select the name, then click the EDIT button.

You'll notice that all fields can be edited including Enable/Disable CPI Access, except the Email Address as mentioned.

Email Address

phillip@balanceenergyhealth.com.au

Confirm Email

phillip@balanceenergyhealth.com.au

CPI - Owner Side Overview

The newly created CPI comes with a set of login credentials provided by the Administrator or CPI Account creator. In future versions, this information will be provided directly to the customer after successful payment verification (on the Website).
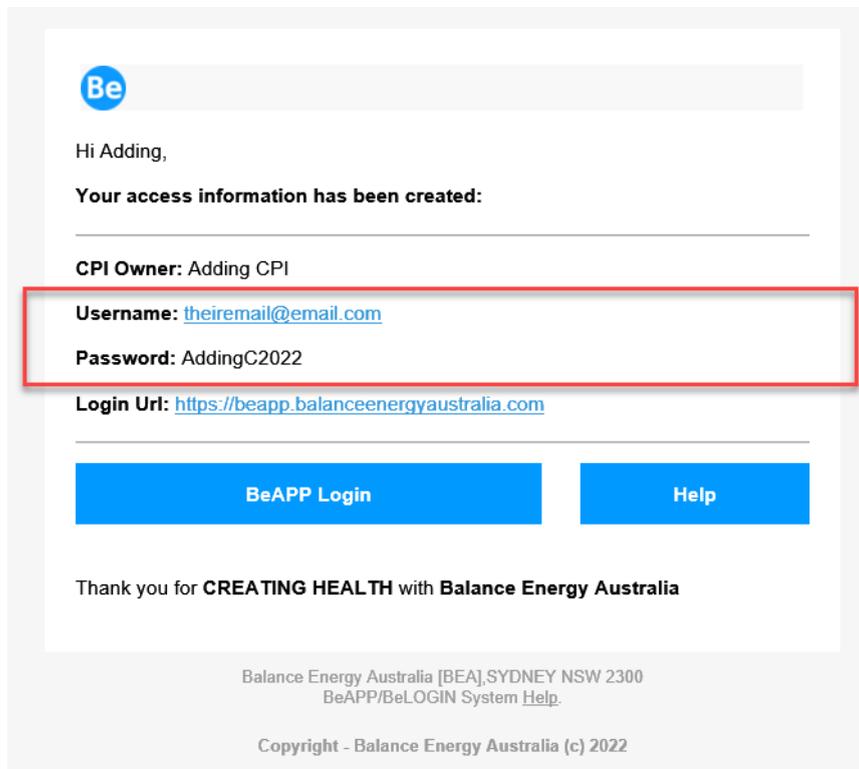
Going to the BeAPP **Login Url** provided, customers will be met with the BeAPP **Login Screen.**
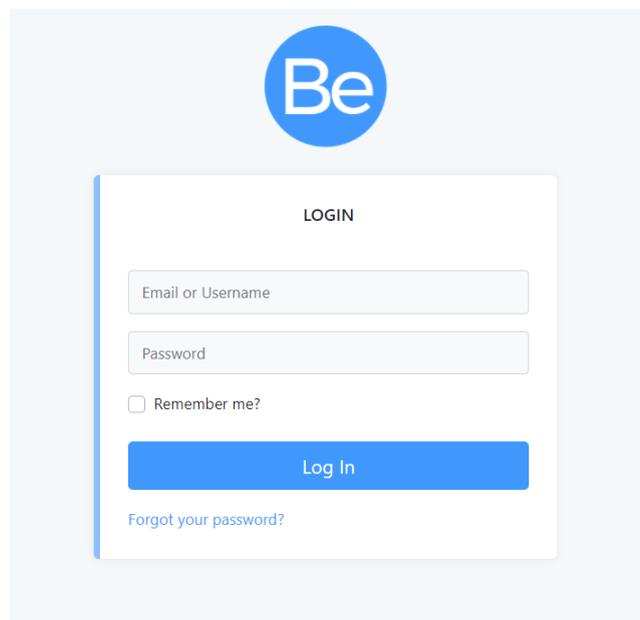
The **signup email address** is entered along with the **provided password** - if all is correct the BeAPP starts.

■ Detail Updates

CPI Owners can update their details when required (change the default password or username…) by accessing the **BeLOGIN** system using the Account menu shown below. They can also find and/or change in BeLOGIN a simple easy to remember username instead of typing email addresses.
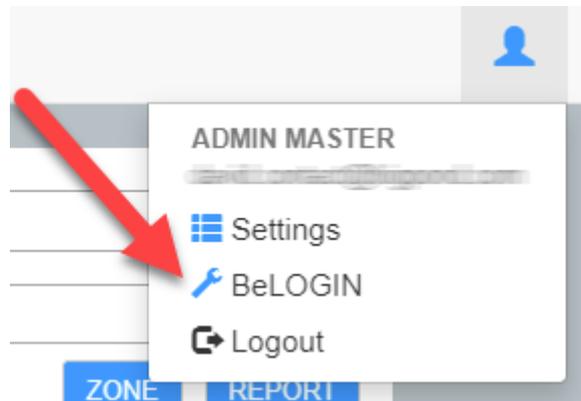
Upon successful login, the **Manage Clients** functionality is shown first.

This is just a subset of the Admin functionality with initial data points added as before.

The **'Practitioner CPI Access Email'** can be set on a per-client basis. This is in line with typical privacy concerns especially if children are being home tested.

Information Sharing is shown as below with down arrows indicating an External Share to the CPI, the up arrows showing the Client is shared with external CPI's.
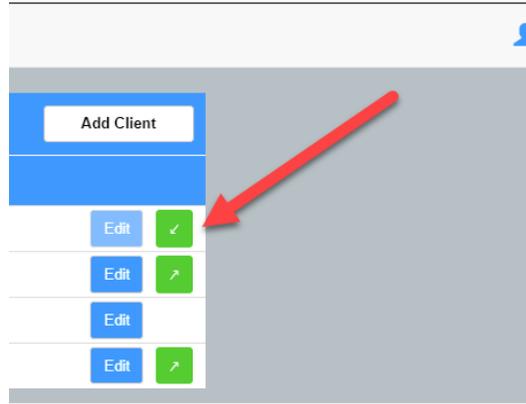
Clicking on the icon initiates a Popup window that shows Client details and the sharer email.
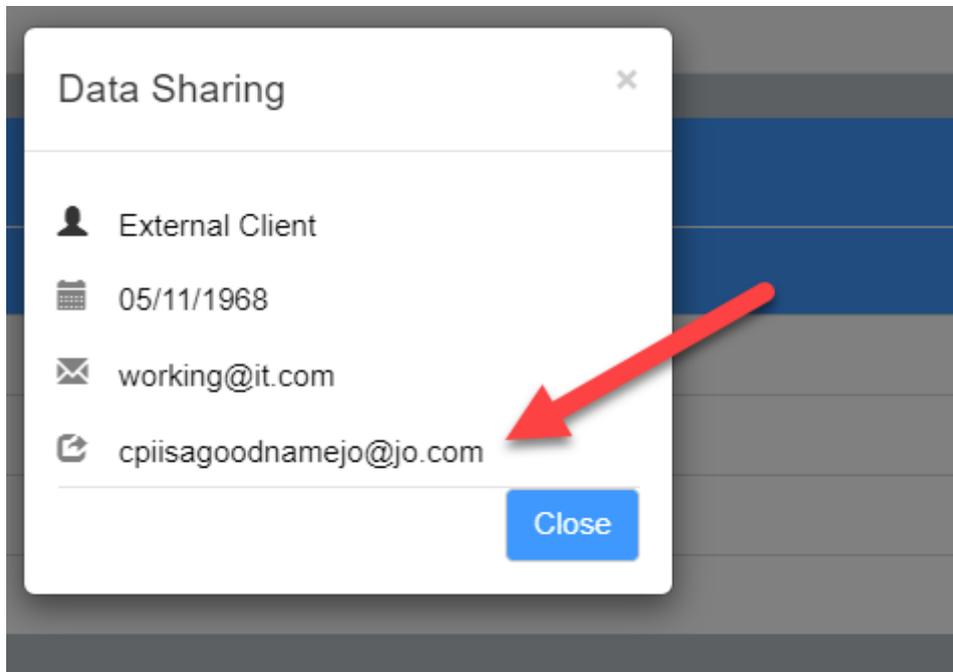
Client setup [ADD Client].

Very similar to the Admin CPI setup, CPI owners are able to generate clients while also applying various options they have paid for. Currently, the supplement levels have no setup controllable so CPI owners are fully able to regulate this aspect.

■ Share Email

The Actual sharing is initiated by the CPI owner once they receive their empty CPI. As they add themselves, family members or the like the decision to apply sharing to each is done then.

The Practitioner emails are entered and then **Check** is clicked. A **CPI ID** must appear otherwise the email is not known to the system or mistyped.

Note: If not entered or not found, CPI generation can still proceed, but without the first choice Practitioner assigned as it can be on the website. Again this is just for completeness in terms of the BeAPP and Website sale relationship.

■ Supplement Levels

The supplement level is set to highest (3) by default, but can be reduced to no supplement information (0) should the CPI wish this. The various implications of the Supplement levels are explained elsewhere in the manuals.

■ Client Options

These must be enabled at the CPI level to become active. The CPI owner can then gift or apply fees for enabling the options.

Zone	- Turns on the Zone Chart Option
WTX Panel	- Turns on/off the WTX Panel
Summary Analysis	- Turns on the Summary Analysis Report functionality
7 Number Test	- Turns on 7 Number Testing

Once all fields are correctly filled out and checked, Clicking **Save** will provide an appropriate message.
Note: if the email address is already used the process will fail.