

ProfitSolver 2.0

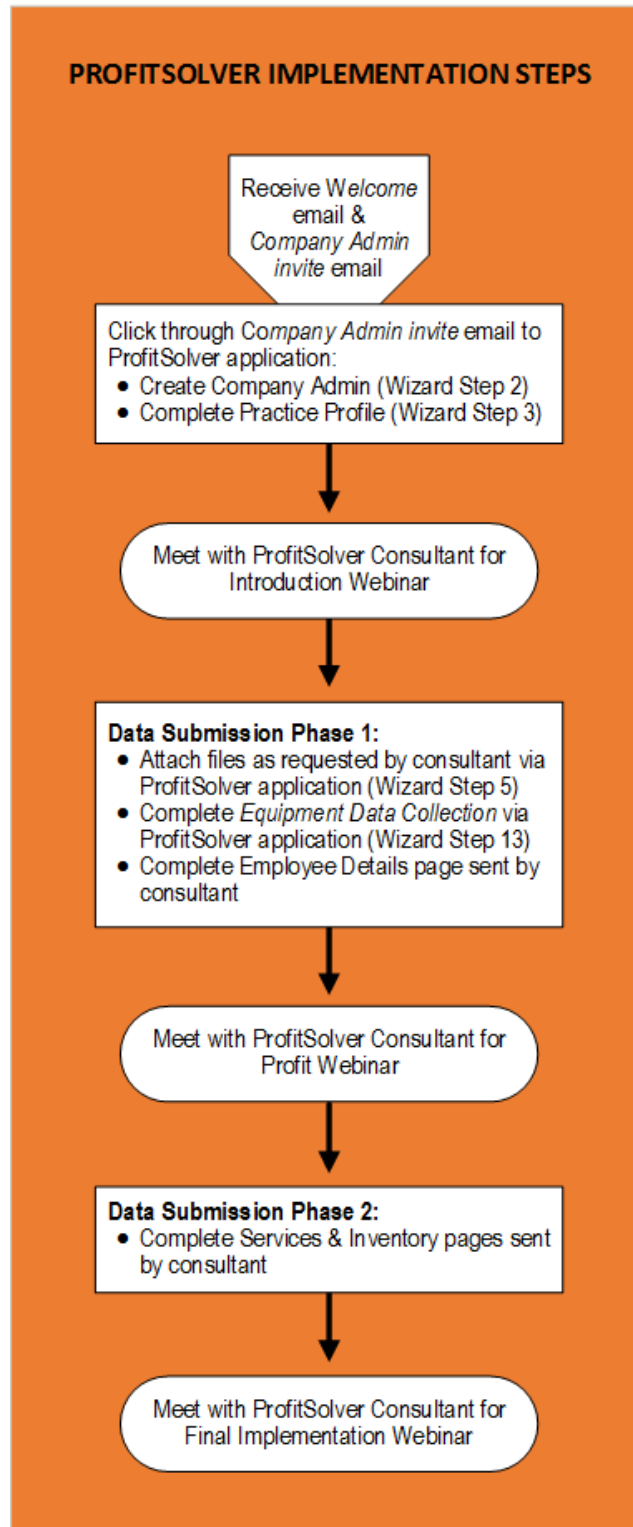
Client Implementation Guide

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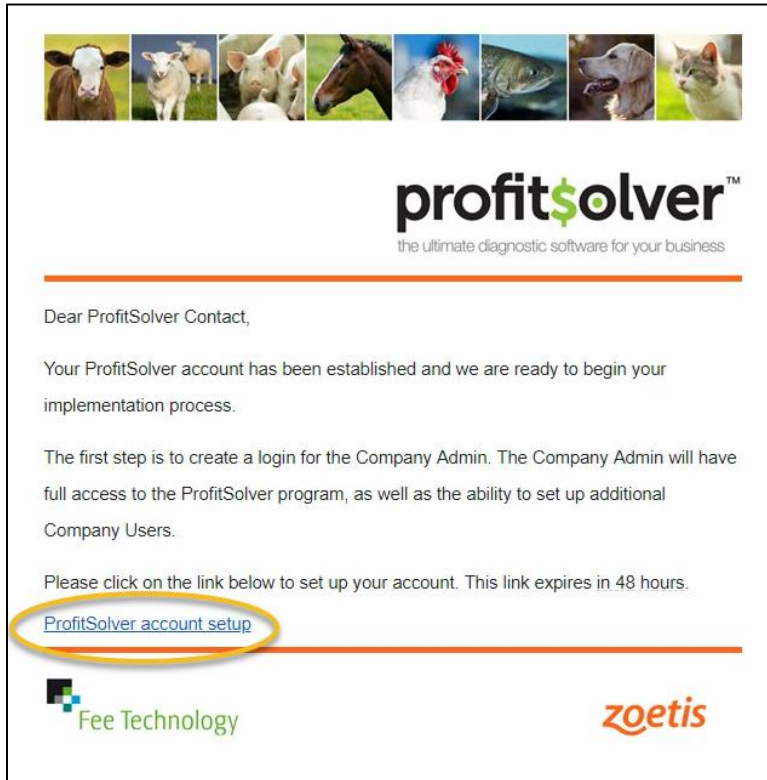
Congratulations on Your ProfitSolver Investment!

Congratulations on your ProfitSolver investment! This document gives a brief overview of the ProfitSolver Implementation, and the steps you'll complete in the process. Video tutorials are also available at <https://profitsolver.com/help-center-ps-2-0/>

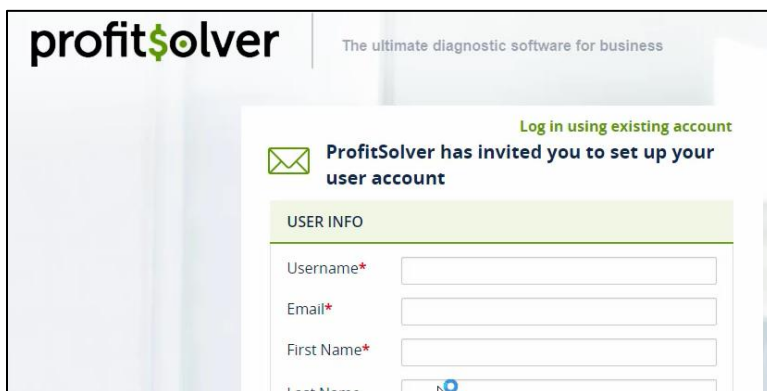


Creating Your Company Admin

Soon after your ProfitSolver account is established, you'll receive an email inviting you to create your Company Admin. The Company Admin will have full access to the ProfitSolver program, as well as the ability to set up additional Company Users. The email will contain a direct link to your ProfitSolver file.



Once clicking on the email link, you'll arrive at the Company Admin setup page where details like the desired username, email, name, and password are entered.



After the form is complete, click SUBMIT ACCOUNT INFO towards the bottom of the page.

ProfitSolver has invited you to set up your user account

USER INFO

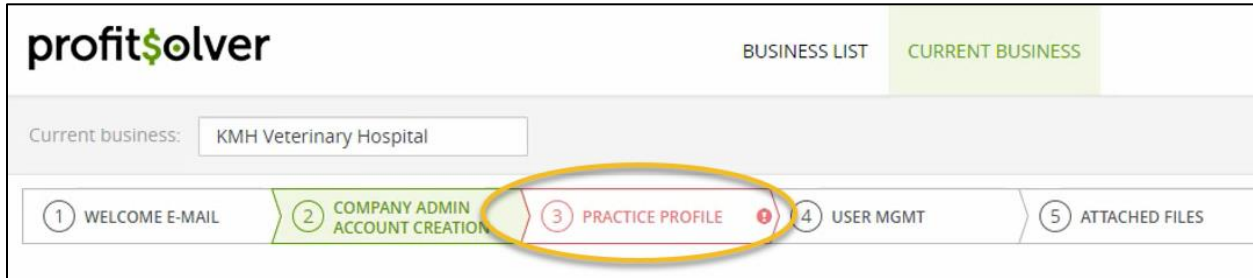
Username*	<input type="text" value="jsmith@email.com"/>
Email*	<input type="text" value="jsmith@email.com"/>
First Name*	<input type="text" value="John"/>
Last Name	<input type="text" value="Smith"/>
Password*	<input type="password" value="....."/>
Confirm password*	<input type="password" value="....."/>
Country	<input type="text" value="United States"/>
State	<input type="text" value="Mississippi"/>
Address	<input type="text" value="123 Main Street"/>
City	<input type="text" value="Anytown"/>
Zip	<input type="text" value="12345"/>

Password should have 8-character minimum, at least one of each of an upper-case letter, a lower-case letter, a number, and a special character (such as "@")

SUBMIT ACCOUNT INFO

Completing Your Practice Profile

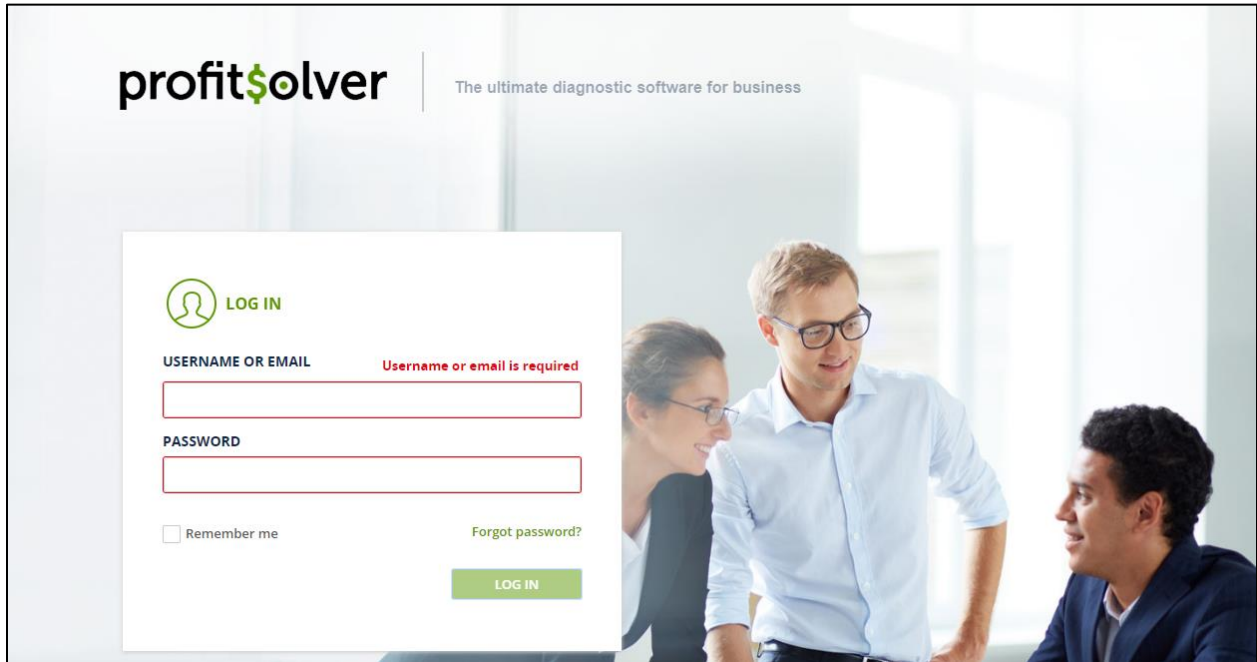
After the Company Admin has been created, the next step is to complete your Practice Profile. To do so, you'll navigate to step 3 of the Wizard.



This brings you to the Practice Profile page where you'll enter information to help your ProfitSolver consultant get to know your practice.

During your ProfitSolver Implementation process, you logged into the program and established your Company Admin user profile. These are the same login credentials you'll use to access your ProfitSolver file after your Implementation is complete. If you're unsure of your password, you may use the "Forgot password?" option on the login page.

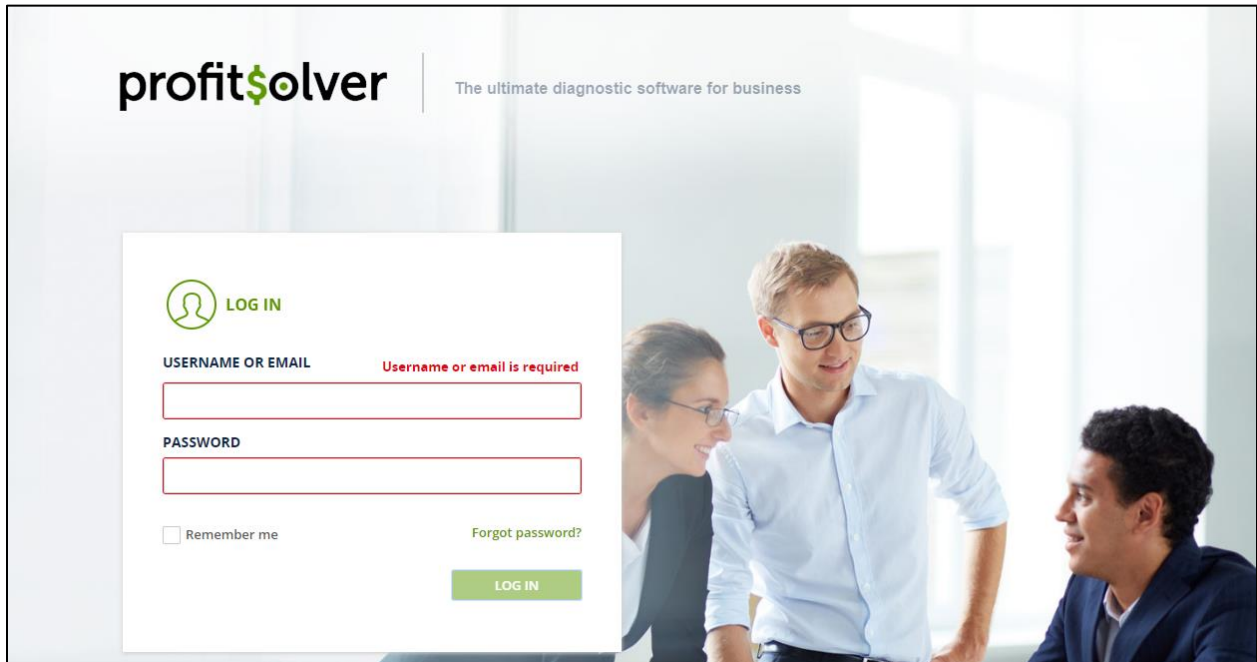
To log in, go to www.profitsolver.co (please note this is .co, not .com).



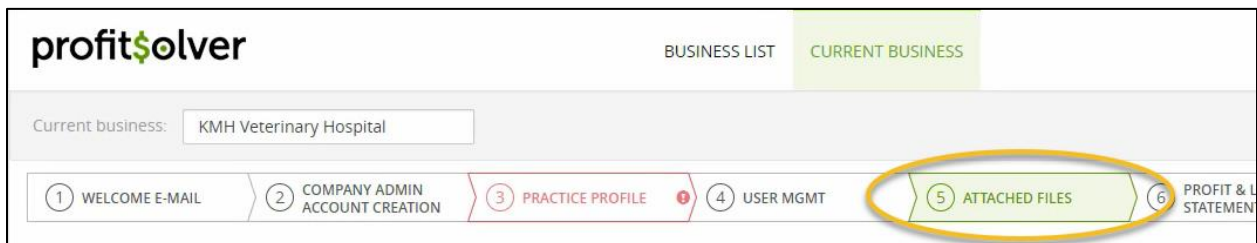
Submitting Data Files

After you and your ProfitSolver consultant meet for the Introduction webinar, it's time to submit the data your consultant needs to begin the analysis. This data generally includes the practice's Profit & Loss report (P&L), Payroll report, Services report, and Inventory report (*please note: all data must be for the same 12-month period*). Your ProfitSolver consultant will specify what data is needed during your Introduction webinar.

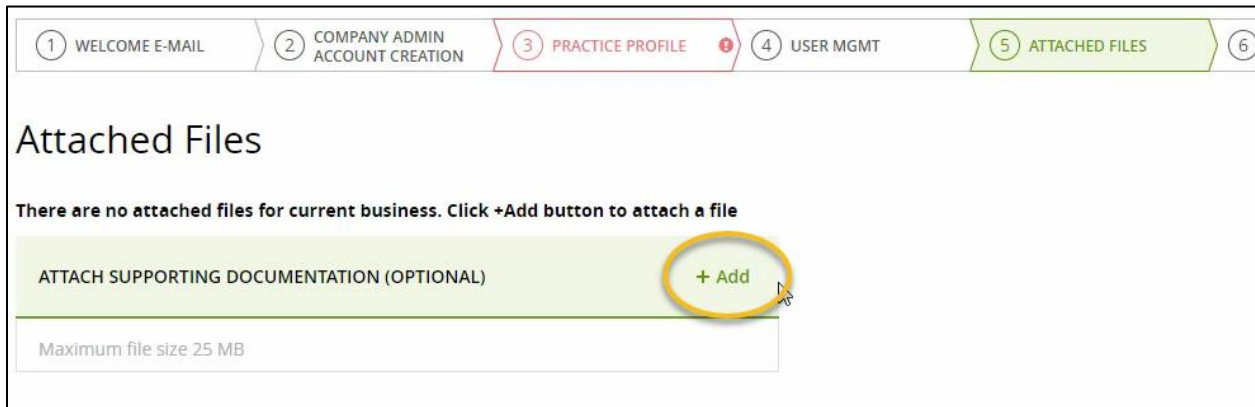
You'll use your Company Admin login credentials to access your ProfitSolver file. To log in, go to www.profitsolver.co (please note this is .co, not .com).



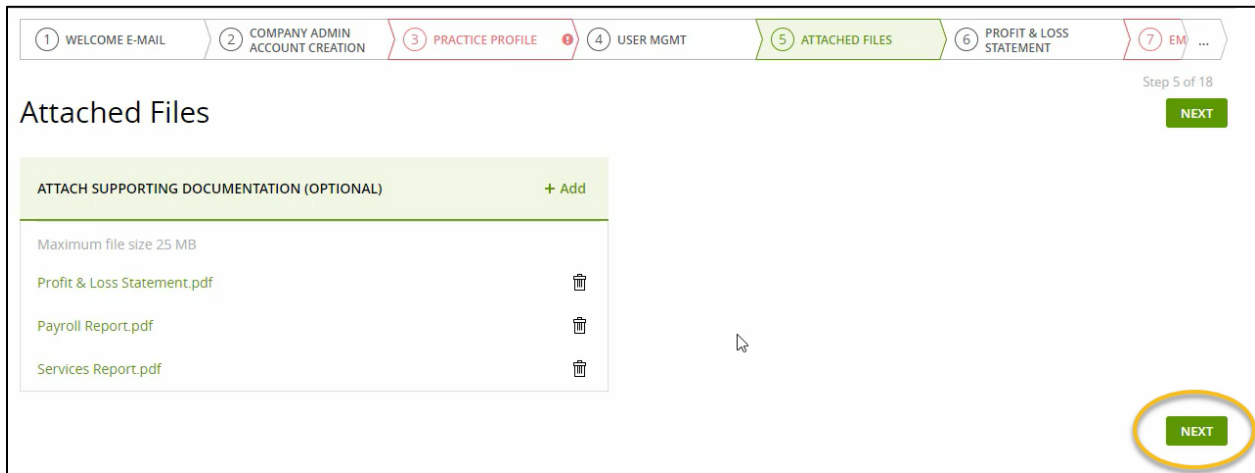
After logging in, navigate to step 5 of the Wizard, ATTACHED FILES.



You'll click +Add for each file you'd like to submit.

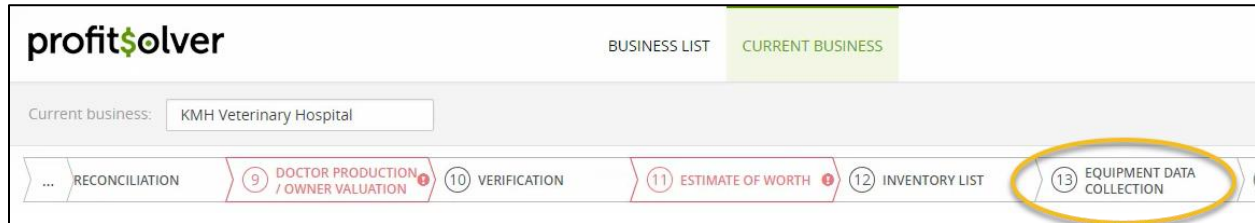


Once the desired files have been selected, click NEXT to submit.



Submitting Equipment Data

The next step is to submit data regarding the equipment used in your practice. After logging in to your ProfitSolver file, navigate to step 13 of the Wizard, EQUIPMENT DATA COLLECTION.



On this page you'll enter each of the major pieces of equipment in use at your practice.

- The Equipment Data Collection form is organized by category, and many of the most common manufacturers and models are available in drop-down menus for your convenience. If your equipment item isn't present, please select "Other" in the drop-down menu.
- Include the purchase price, if known. If not, you may leave this blank as the application is preprogrammed with retail costs for each item.
- Please be sure to enter the Estimated Annual Maintenance & Supply Cost for each piece of equipment. This will include items like service or calibration fees, the replacement cost of wear & tear parts, cloud storage fees, etc.

Equipment Data Collection

ANESTHESIA

MFG. NAME*	EQUIPMENT NAME*	QTY*	TOTAL PURCHASE PRICE FOR ALL UNITS	ESTIMATED ANNUAL MAINTENANCE & SUPPLY COST
Anesthesia Vaporizer				
<div style="border: 1px solid #ccc; padding: 2px;"> <ul style="list-style-type: none"> Generic <li style="background-color: #e6f2e6;">Matrix Medical SurgiVines Other </div>	<div style="border: 1px solid #ccc; padding: 2px;"> </div>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> ✕

DENTAL

MFG. NAME*	EQUIPMENT NAME*	QTY*	TOTAL PURCHASE PRICE FOR ALL UNITS	ESTIMATED ANNUAL MAINTENANCE & SUPPLY COST
DR Digital Dental Radiography				
<div style="display: flex; align-items: center;"> + Add </div>				