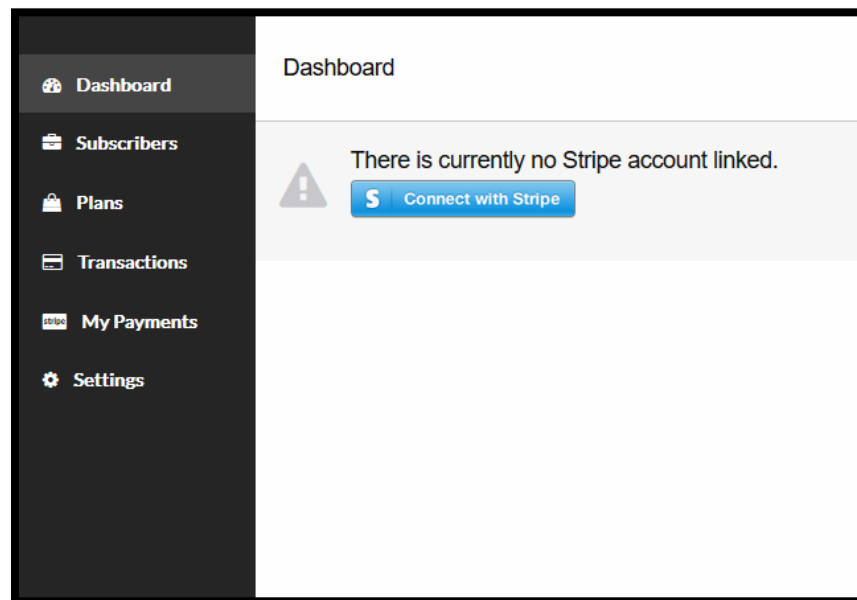


Welcome to the GrayJax Software tutorial guide.

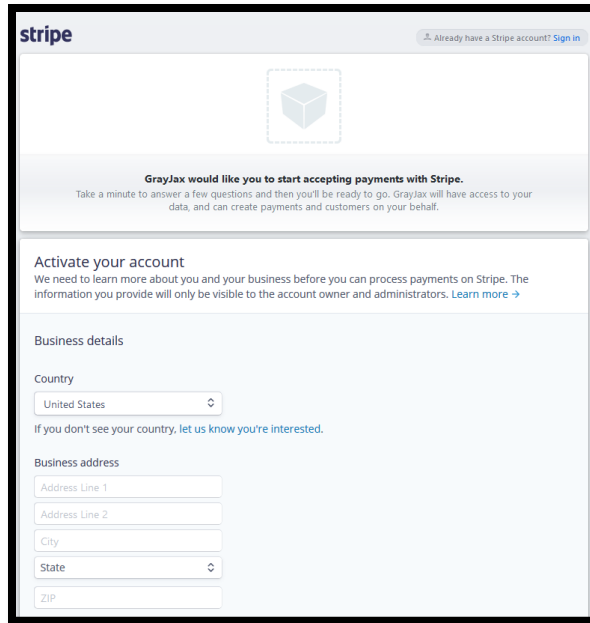
This guide will help you navigate through the software and learn the major functions.

Getting Started

The first thing you need to do is link a stripe account with the GrayJax system. This will handle all of the credit card transactions between GrayJax and your office; as well as the office and your subscribers.

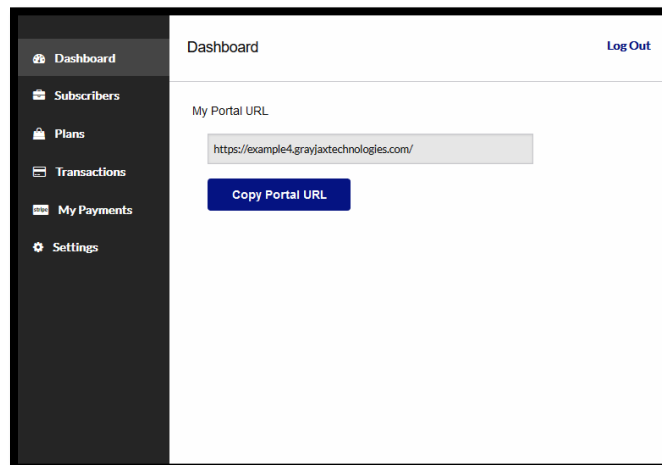


Click on the ***Connect with Stripe*** and go through the process of registering a new account or sign in with your existing stripe account.



The image shows the Stripe account activation page. At the top, the Stripe logo is on the left, and a link "Already have a Stripe account? Sign in" is on the right. Below the logo is a dashed box containing a 3D cube icon. A message states: "GrayJax would like you to start accepting payments with Stripe. Take a minute to answer a few questions and then you'll be ready to go. GrayJax will have access to your data, and can create payments and customers on your behalf." The main section is titled "Activate your account" and includes the text: "We need to learn more about you and your business before you can process payments on Stripe. The information you provide will only be visible to the account owner and administrators. [Learn more](#) →". Below this is the "Business details" section with the following fields: "Country" (a dropdown menu showing "United States"), "Business address" (a group of five input fields: "Address Line 1", "Address Line 2", "City", "State" (a dropdown menu), and "ZIP"). A link "If you don't see your country, let us know you're interested." is located below the country dropdown.

Once registration has been completed, you will be taken back to the GrayJax Dashboard.



The image shows the GrayJax Dashboard. On the left is a dark sidebar with a menu containing: "Dashboard" (with a home icon), "Subscribers" (with a people icon), "Plans" (with a document icon), "Transactions" (with a list icon), "My Payments" (with a credit card icon), and "Settings" (with a gear icon). The main content area is titled "Dashboard" and has a "Log Out" link in the top right corner. Below the title, it says "My Portal URL" and displays the URL "https://example4.grayjaxtechnologies.com/" in a light gray box. Below the URL box is a blue button labeled "Copy Portal URL".

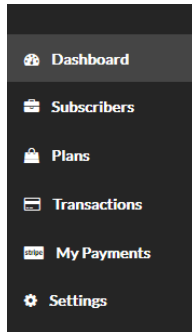
*** Please Note ***

Your Portal URL can be shared with potential subscribers. A good way to do this is to post a link on your office homepage. Patients can view all of your plans and sign up themselves through the link.

The subscriber will also use this URL to log into your own web portal.

The Tool Bar

The tool bar on the left side of the page contains all of the links to help you navigate the software:



- **Dashboard** - Provides a quick overview for all of your subscriber accounts.
- **Subscribers** - All aspect of the subscriber's account will be managed through this tab. This is where the most of your work will be done.
- **Plans** - Here you can create and modify plan(s) that you are offering to potential subscribers.
- **Transactions** - View the transaction history of all of your subscribers
- **My Payments** - View your plan details with GrayJax
- **Settings** - Change your account settings

The Dashboard

The Dashboard provides a clear view of your business at a glance. You can see how many active subscribers are on your plans as well as track new signees for the month. Past due and unpaid balance accounts are identified and flagged for your review.

Dashboard

My Portal URL

https://identistry.grayjaxtechnologies.com/

Copy Portal URL

Accounts Summary

Unpaid Accounts	6
Past Due Accounts	2

Plan Subscriptions Summary

New Sign-Ups	4
Active	14
Expired	0
Cancelled	2

Plan Tab

Here you can add, modify, and remove plans offered to your subscribers.

Add a Plan

If you do not have any existing plans, your screen will look similar to figure 1.

If you do have an existing plan, you will see something like figure 2.

Click **Add a Plan** or **+Add New Plan** to get started.



Figure 1

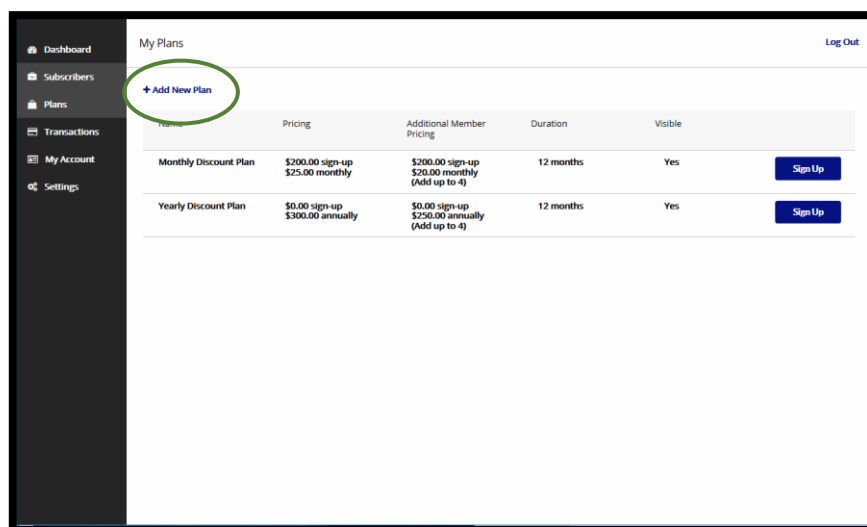


Figure 2

A new window should appear with a form that you must fill out.

Name of Plan →

How often will the subscriber be billed? →

Potential subscribers won't be able to see hidden plans. The Provider will need to send them a special link →

Set the maximum # of family members →

Use this to provide any additional documentation →

Form Fields:

- Plan Name: Greatest Discount Plan Ever!
- Primary Member:
 - Sign Up Fee: \$ 0.00
 - Price: \$ 300.00
- Additional Members:
 - Sign Up Fee: \$ 0.00
 - Price: \$ 250.00
- Billing Period: Yearly
- Duration: 1 Year
- Member Limit: 5
- Description:
Benefits Includes:
Routine Exams and Bitewing X-Rays every 6-Months
Routine Dental Cleaning every 6-months with Fluoride Treatment
Emergency Exams (up to 2 per year)
- Document:
Browse... No file selected.
- ☒ Is Plan Visible? (Clients will be able to see this Plan in your Plan Offerings.)
- Buttons: Cancel, Create Plan

Once the form has been completed. Click **Create Plan**.

Your **Plan Tab** page will be updated.

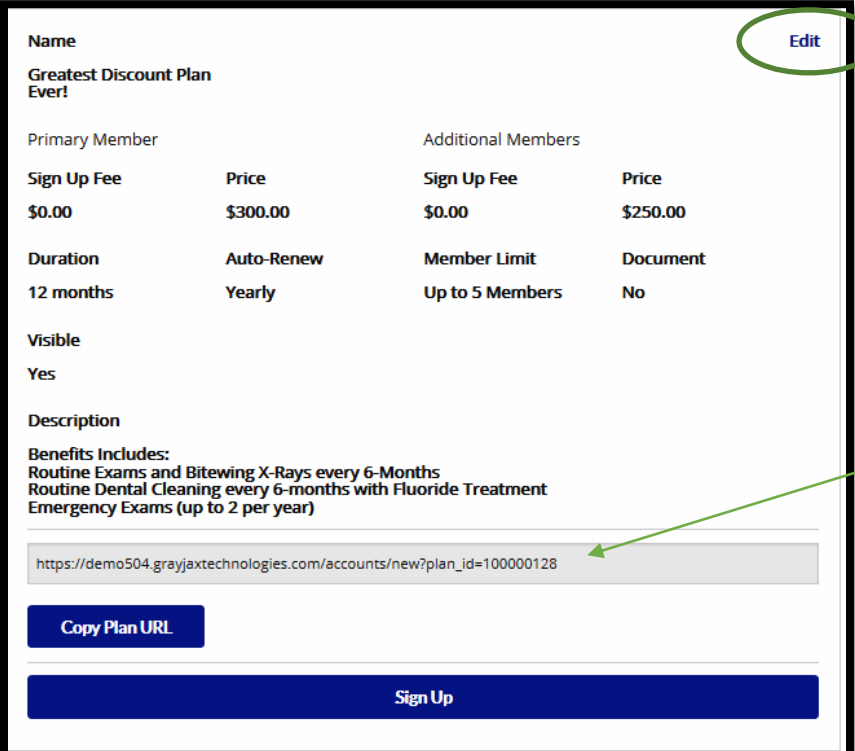
My Plans Log Out

[+ Add New Plan](#)

Name	Pricing	Additional Member Pricing	Duration	Visible	
Monthly Discount Plan	\$200.00 sign-up \$25.00 monthly	\$200.00 sign-up \$20.00 monthly (Add up to 4)	12 months	Yes	Sign Up
Yearly Discount Plan	\$0.00 sign-up \$300.00 annually	\$0.00 sign-up \$250.00 annually (Add up to 4)	12 months	Yes	Sign Up
Greatest Discount Plan Ever!	\$0.00 sign-up \$300.00 annually	\$0.00 sign-up \$250.00 annually (Add up to 4)	12 months	Yes	Sign Up

Edit Plan

To edit a plan, simply click on a plan and hit the **EDIT** button at the top-right corner.



The screenshot shows a form for editing a plan. At the top right, there is a blue 'Edit' button circled in green. The form contains the following fields:

- Name:** Greatest Discount Plan Ever!
- Primary Member:**

Sign Up Fee	Price
\$0.00	\$300.00
- Additional Members:**

Sign Up Fee	Price
\$0.00	\$250.00
- Duration:** 12 months
- Auto-Renew:** Yearly
- Member Limit:** Up to 5 Members
- Document:** No
- Visible:** Yes
- Description:** Benefits Includes:
Routine Exams and Bitewing X-Rays every 6-Months
Routine Dental Cleaning every 6-months with Fluoride Treatment
Emergency Exams (up to 2 per year)
- URL:** https://demo504.grayjaxtechnologies.com/accounts/new?plan_id=100000128
- Buttons:** 'Copy Plan URL' and 'Sign Up' (a large blue button at the bottom).

If your plan is hidden,
use this link to share it

Make any changes and when you are done, click **Update Plan** to save.

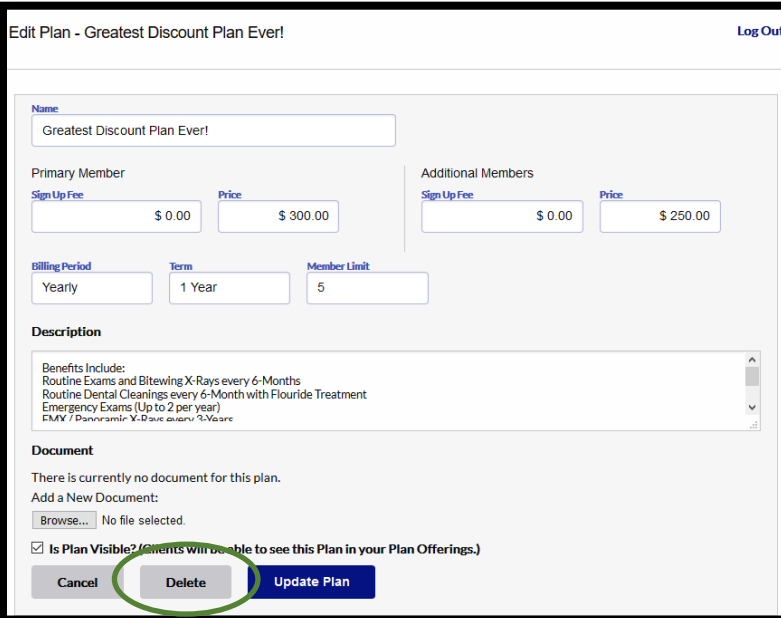
Please Note

Modifying a plan is NOT retro-active. Existing subscribers are locked-in to their original contracted plan.

Modify plans only effect subscribers going forward...

Deleting a Plan

Deleting a plan works similarly to editing; click on **EDIT** at the top-right corner.



Log Out

Edit Plan - Greatest Discount Plan Ever!

Name
Greatest Discount Plan Ever!

Primary Member
Sign Up Fee \$ 0.00 Price \$ 300.00

Additional Members
Sign Up Fee \$ 0.00 Price \$ 250.00

Billing Period Yearly Term 1 Year Member Limit 5

Description
Benefits Include:
Routine Exams and Bitewing X-Rays every 6-Months
Routine Dental Cleanings every 6-Month with Fluoride Treatment
Emergency Exams (Up to 2 per year)
CBCT / Panoramic X-Rays every 2-Years

Document
There is currently no document for this plan.
Add a New Document:
Browse... No file selected.

☒ Is Plan Visible? (Clients will be able to see this Plan in your Plan Offerings.)

Cancel Delete Update Plan

Click on **Delete** to remove the plan.

Please Note

Subscribers on a delete plan will be so indefinitely until either they cancel their contact or request a plan change.

Subscribers Tab

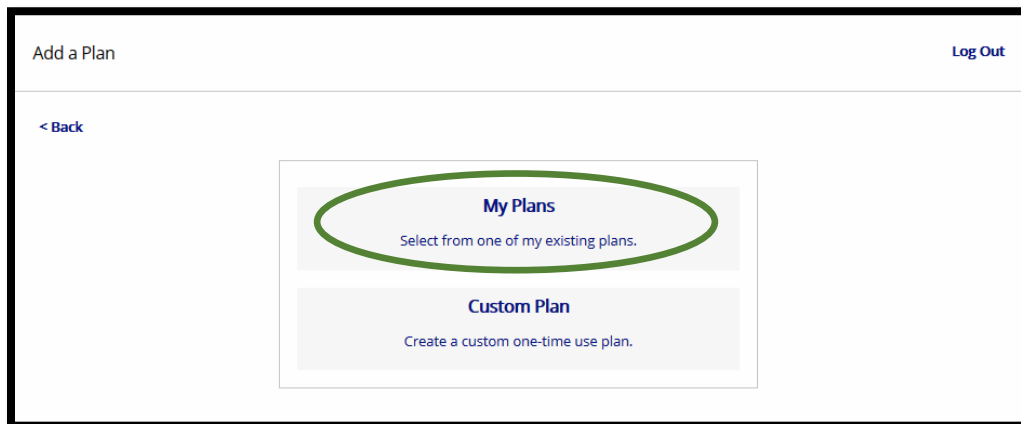
The majority of your work will be done through this menu. This tutorial will cover most of the important features.

Add an Account

From the subscriber tab, click + **Add Accounts**



On the next page, you will be asked to pick a plan type.
For this example, we will pick **MY PLAN....**



A list of plans that you have previously created will be displayed.
Select the one that is appropriate.
Click **Sign Up**.

My Plans Log Out

[+ Add New Plan](#)

Name	Pricing	Additional Member Pricing	Duration	Visible
Greatest Discount Plan Ever!	\$0.00 sign-up \$300.00 monthly	-	12 months	Yes

[Sign Up](#)

This will bring up a form that you must fill out.
The first part of the form is the **Subscribers Information**

Add New Account

Account Holder

First Name Last Name

Preferred Name (optional) Date of Birth

Gender Street Address

City State ZIP Code

Phone Number Secondary phone

Email Address ☐ Decline Email
(No Portal Access)

Additional Members

None You will be able to set-up these additional members after registering.

*** Please Note ***

- Any account created without an **Email**, the subscriber will not have access to their own web portal (*you can go into their account later and change this*)
- Additional Member** indicates how many family members they want to sign up at this point.
 - The subscriber has up to 30 days from this point to add any additional family member(s).
 - Only the office can remove a family member(s).
 - After 30-days, the account is locked.

The next part of this form will ask about the **Date of Activation** and **Auto-Renew**.

Plan Start Date
10/30/2018

Plan start dates in the past will not be charged sign-up fees

☐ **Enable Auto-Renew for This Plan**

By enabling Auto-Renew, this plan will automatically renew on the plan end date. This account will be automatically billed for the plan renewal amount using the stored payment method.

*** Please Note ***

- Any activation with a date that is in the past will not be charged a Sign-Up and any recurring fee up to the present.
(it is assumed that all fees have already been collected)
- Accounts without the **Auto-Renew** feature enabled, their subscription will expire/close after the terms have been fulfilled.

The last part of the form will be about **Payment Information**.

There are two forms of payment: Credit Card and In-Person Payments

Payment Information

☐ **Credit/Debit Card** ☐ **In Person Payments**

Name on Card

Card Number

Exp Month Exp Year CVC Billing Zip

Automatic Recurring Payment Agreement

Upon submission method of payment, I authorize Hogwarts Dentistry to initiate a recurring payment to the method of payment provided on or after the scheduled payment date. The payment will be debited from this account until the terms of the plan have been completed. To cancel this automatic payment authorization, I must contact Hogwarts Dentistry at least 7 business days prior to a scheduled payment date. Hogwarts Dentistry may cancel this authorization if a payment is returned unpaid.

☐ **Agree to the Terms & Conditions**

Cancel Next

*** Please Note ***

- If there is a credit card on record, fees will be charged to the card first.
- Accounts with no credit card info, fees will be charged to the account. The office will need to collect the money and then apply a credit using the "Add New Payment" feature.
- Switching between the two forms of payment is as simple as removing the credit card info on the provider portal. (subscriber cannot remove their card info, they can only update)
- Subscribers signing up on the plans page must use a credit card.
- In-office signup through the provider portal can be setup as an In-Person Payment. Since this type of payment requires manually collecting the fees from the subscribers, it is up to the discretion of the provider if they want to use this feature.

Once you have selected the Payment Option, agree to the **Terms and Conditions** and click **NEXT**.

Review Plan Sign-Up

My Information

Name

John Doe

Preferred Name

-

Address

1000 Nowhere Street
Anytown, AK 30340

Phone Number

770-777-7777

Email

Declined

Plan Information

Name

Greatest Discount Plan Ever!

Plan Start Date

November 09, 2018

Plan End Date

November 09, 2019

Auto-Renew Plan

Yes

Amount To Be Charged

Name	Sign-Up Fee	First Payment	Fee Total
John Doe	\$0.00	\$300.00	\$300.00
Total Charge			\$300.00

Payment Information

Name on Card

John Doe

Card Ending In

*4242

Cancel

Edit

Purchase

The last page is the review page.
You can see the plan you have selected as well as the total cost.
Review all of your selections and click **Purchase** when ready.

Account Management

Once an account has been created, you will be taken to the account details page.

The account details contain six important sections:

- **Subscription Information** - View details such as monthly fees, billing cycle, etc.
- **Subscriber Information** - View and modify personal information including email.
- **Additional Account Members** - View, add, and modify additional family members.
- **Credit Card Information** - Add and remove credit card information
- **Recent Activity & Notes** - View and add notes
- **Recent Transactions** - View and add transaction payment

I. Subscription Information

Here you will find details about the plan your subscriber signed up with.

Subscriber Account Details (#35447840)
Member Since: October 3, 2018

Current Balance
\$24.99

Estimated Next Payment
\$49.98

Next Payment
April 8, 2019

[+ Apply Payment/Charge Account](#)

Plan Information

Name	Status
Monthly Discount Plan	Active
Start Date	End Date
May 8, 2018	May 8, 2021
Duration	Auto-Renew
36 months	Enabled
Next Subscription Payment	Total Recurring Fee
April 8, 2019	\$24.99/monthly

[Disable Auto-Renew](#) [Cancel Subscription](#)

[+ Change Plan](#)

Add a Payment and
Create a Charge

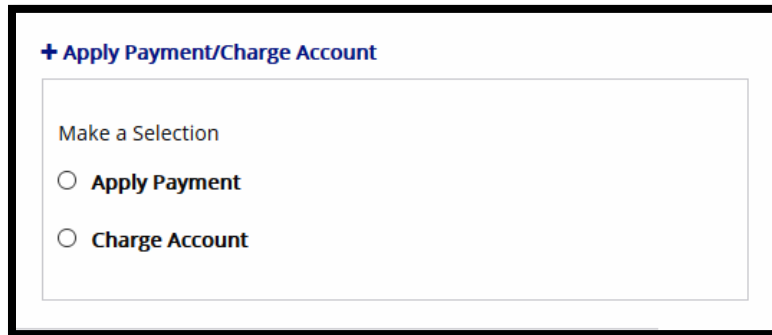
Please Note:

You can only transition from one plan to another if they have the same billing period (month to month / year to year)

Apply Payment / Charge Account

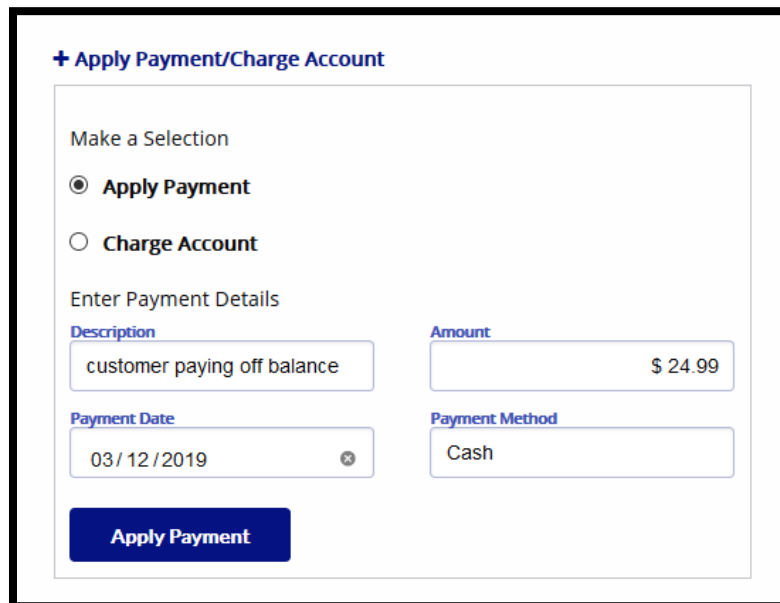
When you click on the button, a new window will appear.

- ***Apply Payment*** will apply a credit to the account.
- You will need to collect this amount in the office.



The screenshot shows a window titled "+ Apply Payment/Charge Account". Inside, there is a section labeled "Make a Selection" with two radio button options: "Apply Payment" and "Charge Account". The "Apply Payment" option is currently selected.

- Fill out the fields and select a payment method.
- Click ***Apply Payment*** when done.



The screenshot shows the same window, but now with payment details entered. The "Apply Payment" radio button is selected. Below the selection options is a section labeled "Enter Payment Details" with four input fields: "Description" (containing "customer paying off balance"), "Amount" (containing "\$ 24.99"), "Payment Date" (containing "03/12/2019"), and "Payment Method" (containing "Cash"). A blue "Apply Payment" button is at the bottom.

Subscriber Account Details (#35447840)
Member Since: October 3, 2018

Current Balance

\$0.00

Estimated Next Payment

\$24.99

Next Payment

April 8, 2019

+ Apply Payment/Charge Account

Plan Information

Name	Status
Monthly Discount Plan	Active
Start Date	End Date
May 8, 2018	May 8, 2021
Duration	Auto-Renew
36 months	Enabled
Next Subscription Payment	Total Recurring Fee
April 8, 2019	\$24.99/monthly

Disable Auto-Renew

Cancel Subscription

+ Change Plan

The balance will be adjusted to reflect the credit that was added.

Creating a charge works similar to adding a payment; fill out the fields and click **Create Charge** when done.

+ Apply Payment/Charge Account

Make a Selection

☐ **Apply Payment**

☒ **Charge Account**

Enter Charge Details

Description

charging account for work

Amount

\$ 50.00

Account balance changes will be processed for payment on the next monthly payment date of April 8, 2019

Charge Account

The new balance will be updated.

Subscriber Account Details (#35447840)
Member Since: October 3, 2018

Current Balance

\$50.00

Estimated Next Payment

\$74.99

Next Payment

April 8, 2019

+ Apply Payment/Charge Account

Plan Information

Name

Monthly Discount Plan

Status

Active

Start Date

May 8, 2018

End Date

May 8, 2021

Duration

36 months

Auto-Renew

Enabled

Next Subscription Payment

April 8, 2019

Total Recurring Fee

\$24.99/monthly

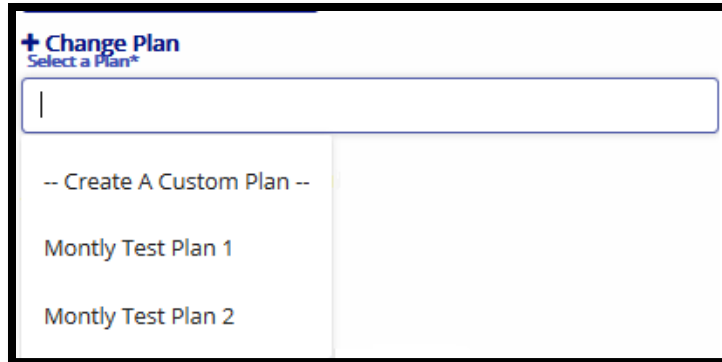
Disable Auto-Renew

Cancel Subscription

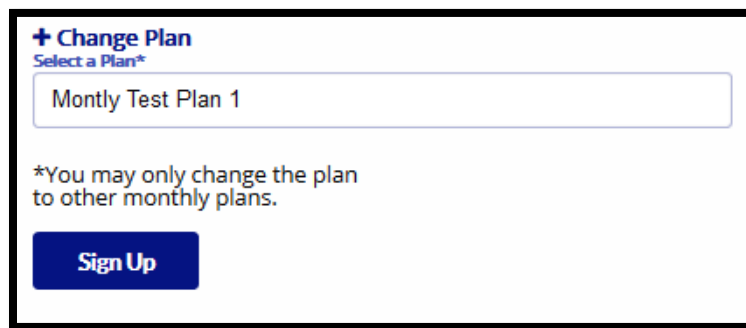
+ Change Plan

Change Plan

When you click on the + ***Change Plan*** button, a drop-down menu will appear allowing you to select different plan(s) to transition to.



The screenshot shows a dropdown menu titled '+ Change Plan' with the subtitle 'Select a Plan*'. The menu is open, displaying a search bar at the top. Below the search bar, there are three options: '-- Create A Custom Plan --', 'Montly Test Plan 1', and 'Montly Test Plan 2'. The menu is styled with a light blue header and a white background for the list items.



The screenshot shows the 'Change Plan' form after a selection. The title is '+ Change Plan' with the subtitle 'Select a Plan*'. The search bar now contains the text 'Montly Test Plan 1'. Below the search bar, there is a note: '*You may only change the plan to other monthly plans.' At the bottom of the form, there is a blue button labeled 'Sign Up'.

Once a plan has been selected, click ***Sign Up*** to proceed.

Please Note

- Only plans with similar billing period will be displayed.
- Offices on a ***Starter Plans*** will not have this feature since they are limited to just one plan.

Review Plan Changes

My Information

Name

John Doe

Preferred Name

-

Address

1001 Nowhere Lane
Anytown, AL 30006

Phone Number

777-000-0000

Email

79184103@grayjax.plan

New Plan Information

Name

Montly Test Plan 1

Plan Start Date

December 28, 2018

Plan End Date

December 28, 2019

Recurring Payment Amount

\$15.00/monthly

☐ Enable Auto-Renew for This Plan

By enabling this Auto-Renew feature, we will automatically renew your plan once the original plan term has been completed. Your account will be automatically billed for the renewal.

Name

Montly Test Plan 1

Primary Member

Sign-up Fee

\$100.00

Price

\$15.00/month

Duration

12 months

Description

Montly Test Plan 1

Additional Members

Sign Up Fee

\$100.00

Price

\$10.00/month

Member Limit

Up to 5 Members

Cancel

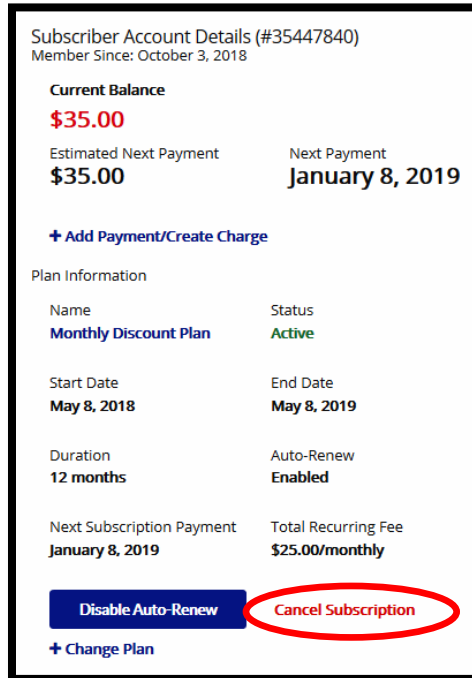
Sign Up

You will be taken to the Review Page.

Go over the details of the new plan, click **Sign Up** to complete.

Cancel Subscription

In the event that a subscriber wants to cancel their account, you would click this button.



Subscriber Account Details (#35447840)
Member Since: October 3, 2018

Current Balance
\$35.00

Estimated Next Payment **\$35.00** Next Payment **January 8, 2019**

[+ Add Payment/Create Charge](#)

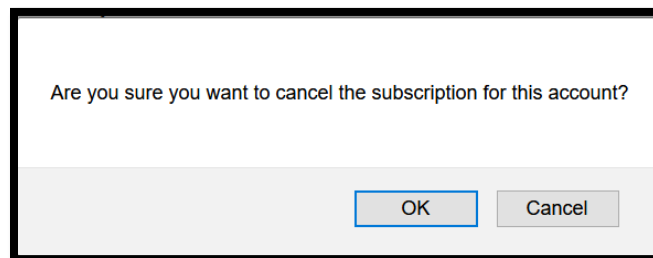
Plan Information

Name	Status
Monthly Discount Plan	Active
Start Date	End Date
May 8, 2018	May 8, 2019
Duration	Auto-Renew
12 months	Enabled
Next Subscription Payment	Total Recurring Fee
January 8, 2019	\$25.00/monthly

[Disable Auto-Renew](#) [Cancel Subscription](#)

[+ Change Plan](#)

You will be prompted to confirm your request.



Are you sure you want to cancel the subscription for this account?

After you have cancelled the account, the status should be updated to **Cancelled**. There should be a new button at the bottom; **+ Add New Plan** should be used to start a new plan.

Account Details (#24936988)
Member Since: August 30, 2018

Current Balance
\$0.00

Plan Information

Name	Status
Discount Plan - Monthly	Cancelled

Start Date: August 31, 2018 End Date: November 30, 2018

Duration: 12 months Auto-Renew: Enabled

Next Subscription Payment: November 30, 2018 Total Recurring Fee: \$30.00/monthly

+ Add New Plan

Annotations:

- Account Status points to the **Cancelled** status.
- Add a new plan / Reactivate account points to the **+ Add New Plan** button.

To add a plan, simply click **+ Add New Plan** and a list will appear displaying all of your plans from your **Plan Tabs**.

+ Add New Plan
Select a Plan

Greatest Discount Plan Ever!

-- Create A Custom Plan --

Monthly Discount Plan

Yearly Discount Plan

Greatest Discount Plan Ever!

Sign-up fees are waived when applying a plan start date before today's date.

Plan Details

After you have selected the plan, click on **Sign Up** to move to the review page.

Review Plan Sign-Up

My Information

Name

John Doe

Preferred Name

-

Address

101 Nowhere Lane
Anytown, AZ 30300

Phone Number

555-555-5555

Email

Declined

Plan Information

Name

Greatest Discount Plan Ever!

Plan Start Date

November 08, 2018

Plan End Date

November 08, 2019

Auto-Renew Plan

No

Amount To Be Charged

Name	Sign-Up Fee	First Payment	Fee Total
John Doe	\$0.00	\$300.00	\$300.00
Total Charge			\$300.00

Payment Information

☒ Charge to account

Cancel

Edit

Purchase

Reviewed all the information, you can click on ***Sign Up***.

II. Subscriber Information

Here you can view and modify subscriber's personal information.

The email listed here is the same email that the subscriber must use to log in.

Subscriber Information - Edit Account Details	
Name John Doe	Preferred Name -
Date of Birth 04/25/1988	Gender Male
Address 101 Nowhere Lane Anytown, GA 30300	Phone Number 555-555-5555
Email demoemail@grayjaxplan.com	

III. Additional Account Members

Here you can view and add/delete family members.

Additional Account Members - Add up to 4 Members

Name	Birth Date	Gender	
Jane Doe	11/11/1998	Female	Remove
John Doe Jr.	02/01/1992	Male	Remove

[+ Add a Member](#)

*** Please note ***

Adding a family member can only be done during the initial month of activation.
As a provider, you can delete a family member at any time.

Additional Account Members - Add up to 4 Members

Name	Birth Date	Gender	
Jane Doe	11/11/1998	Female	Remove
John Doe Jr	02/01/1992	Male	Remove

After the initial 30 days, the account becomes “locked” and you can no longer add any additional members.

IV. Credit Card Information

Here you can view the credit card information

This is how the section will look when there is no card on file.
Click **+Add Credit Card** to update.

Credit Card Information

[+ Add Credit Card](#)

Fill in the fields and click **Agree and Save**

Update Credit Card

Name on Card

John Doe

Card Number

42424242424242

Exp Month **Exp Year** **CVC** **Billing Zip**

09 - Sep 2038 999 99999

Automatic Recurring Payment Agreement

Upon submission method of payment, I authorize Grayjax Team to initiate a recurring payment to the method of payment provided on or after the scheduled payment date. The payment will be debited from this account until the terms of the plan have been completed. To cancel this automatic payment authorization, I must contact Grayjax Team at least 7 business days prior to a scheduled payment date. Grayjax Team may cancel this authorization if a payment is returned unpaid.

Agree and Save

Cancel

This is how the section will look after the update.

Credit Card Information

Name on Card

John Doe

Type

Visa

Ending In

**** * 4242

Update

Delete

V. Recent Activity & Notes

Here you can view and add notes/comments.

There are two types of notes: user notes and system generate notes

Recent Activity & Notes	
+ Add Note	
Date	Message
08/31/18 02:05PM EDT	[User] Customer will add an additional member on Monday
08/31/18 01:00PM EDT	Account details changed: Updated At
08/31/18 01:00PM EDT	New plan sign-up: Discount Plan - Monthly
08/31/18 10:21AM EDT	Plan status change: Active >> Cancelled
08/30/18 03:42PM EDT	New plan sign-up: Discount Plan - Monthly
> View All	

VI. Recent Transactions

Here you can view past transactions for the subscriber's account.

Recent Transactions				
Date Posted	Description	Transaction Type	Amount	Ending Balance
01/08/19	paid in full	Cash	-\$55.00	\$0.00
12/16/18	Recurring Subscription Fee	Fee	\$55.00	\$55.00
12/06/18	pay in full	Cash	-\$55.00	\$0.00
11/30/18	Recurring Subscription Fee	Fee	\$55.00	\$55.00
11/30/18	paying off balance	Cash	-\$355.00	\$0.00
> View All				

Please Note

Viewing Transactions history from the **Subscriber Tab** will only show you the transactions for that account.

The **Transaction Tab** will show you the transactions history of all accounts.

Transaction History Tab

Here you can see all of the transaction done by office. You can click on the account number to go directly into an account to get more details.

Transaction History					
Date Posted ▾	Account No	Name	Description	Transaction Type	Amount
08/20/18	38270491	david williams	Recurring Subscription Fee	Fee	\$25.00
08/03/18	38270491	david williams	Account Payment - Visa 4242 Stripe (Details)		-\$25.00
07/20/18	38270491	david williams	Recurring Subscription Fee	Fee	\$25.00
07/03/18	38270491	david williams	Subscription Sign-up Fee	Fee	\$25.00
07/03/18	38270491	david williams	Account Payment - Visa 4242 Stripe (Details)		-\$25.00
Export All					

Congratulation!

You have successful completed the tutorial.

If you have any questions, please check our FAQs.

If you any additional questions, please call us!