

PROVIDER QUICK START GUIDE

1

CREATE YOUR PAYMENT ACCOUNT

Click Payments and then click the yellow box that says "No Stripe Connect Account" to setup your Stripe account so you can accept payments from clients.

2

INVITE YOUR FIRST CLIENT(S)

Go to People>Add Profile and type in their name and email address. Your client will get an invite via email to click and accept.

3

SETUP YOUR WAITING ROOM

Head over to Settings>Waiting Room and pick your favorite image and music for your clients!

4

GET YOUR CLIENT SCHEDULER SETUP

Client Scheduler allows clients to request appointments with you! Go to Scheduling>Client Scheduler and set your office hours and more!

5

SCHEDULE YOUR FIRST APPOINTMENT

Once your client has joined your practice (you'll get an email), go to Scheduling>My Calendar>Create Appointment to schedule an appointment with them. Don't forget to put in a payment amount if you want them to pay up front.

6

SPRUCE UP YOUR PROFILE

Make sure your profile is complete by uploading a picture of yourself under Settings>Profile. Also, make sure your practice name is what you want clients to see.

7

ADD THERA-LINK TO YOUR WEBSITE

If you plan for clients to self-schedule, add a link on your website to your Scheduler. Or, you might want to add a link to the thera-LINK login page. Check out Support>Marketing for banners and materials to use!

8

PREPARING FOR YOUR FIRST APPT

Make sure you use our Device Guide to ensure you are using the right browser! Run a test using Support>search "Test" or test with a friend/partner!

9

JOINING YOUR FIRST APPT

Login at the day/time of your appt and click JOIN on the Dashboard. Click START SESSION. Let your client in by clicking one time on their name when you hear the doorbell chime and see they are waiting!

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SUPPORT

We have many options for support/help!

VIDEOS: Click Support> search "videos"

GUIDES/KNOWLEDGE: Click Support> search

CHAT SUPPORT: Click "Chat with thera-LINK"

PHONE SUPPORT: Call number in lower left corner