



ACCOUNT ACTIVATION GUIDE

Your platform is built. Let's turn it on.

A step by step walkthrough to configure the final details, confirm everything is correct, and take your first order.

6

Guided steps

~60

Minutes start to finish

1

Test order to go live

Welcome. Your account is ready.

Our team has already built your platform. Your portals, your branded domains, your product catalog, your provider connection, and your automations are configured and waiting for you.

This guide replaces the live onboarding call. It walks you through the few things only you can set, shows you exactly where to click, and gets you to your first order. Follow it top to bottom. Most people finish in under an hour.

HOW THIS GUIDE WORKS

1

Configure

Set the handful of details unique to your business.

2

Confirm

Verify the items our team pre-built look right to you.

3

Go live

Run one real test order, then open your doors.

NOTE

Each step shows a WHERE bar telling you the exact page to open, a numbered walkthrough, and a checklist to tick off before moving on. When you see a screenshot, it matches what you will see on your own screen.

THE SIX STEPS

- 01 Create your account and log in
- 02 Set your brand identity and colors
- 03 Confirm your domains and email sending
- 04 Invite your team
- 05 Review and publish your catalog
- 06 Run a test order and go live

01

Create your account and log in

START HERE, EVERY USER DOES THIS

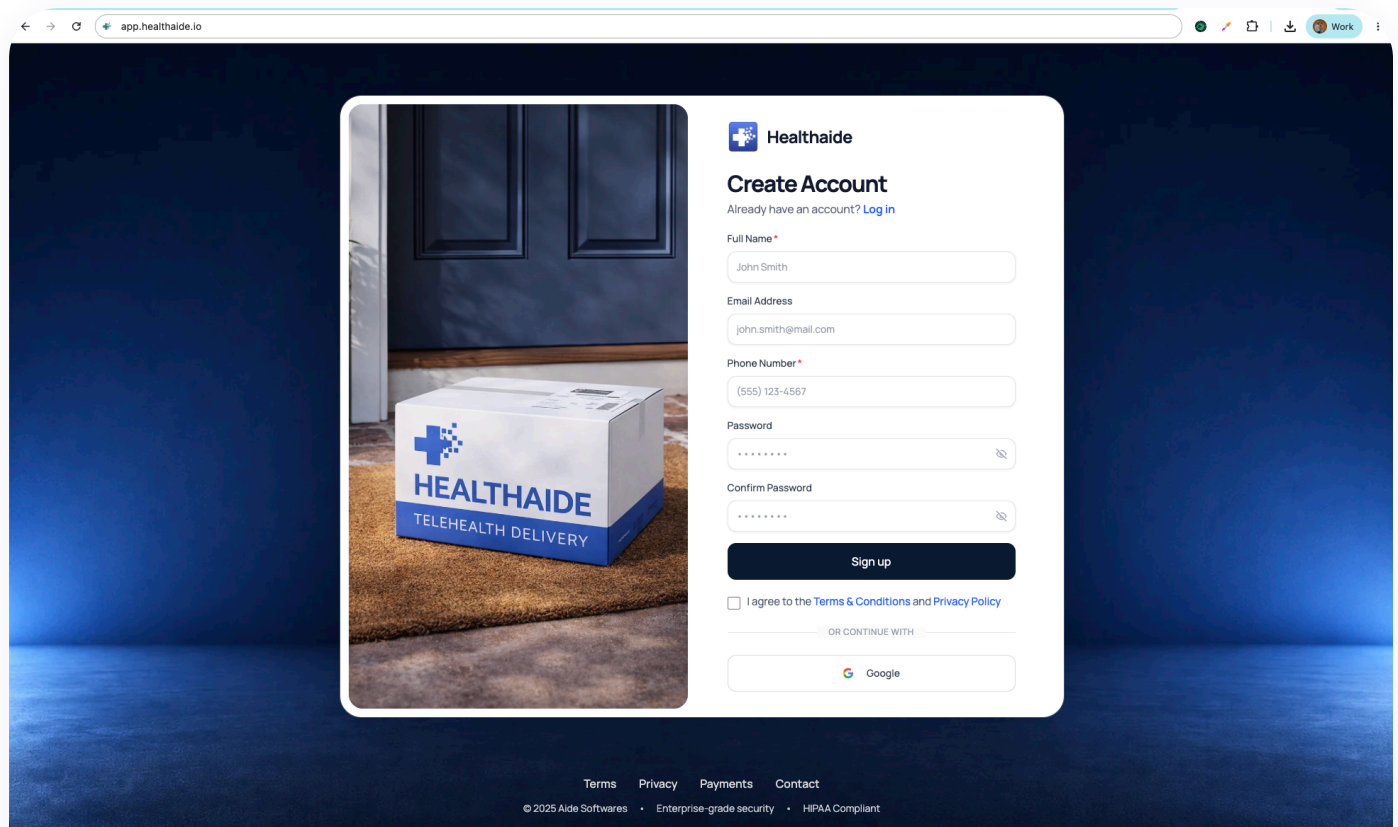
WHERE **app.healthaide.io**

Your account access starts with the email address that received your invitation. You create your login first, then sign in with it.

CREATE YOUR ACCOUNT

- 1 Go to **app.healthaide.io** in your browser.
- 2 On the Create Account screen, enter your **full name**, then the **same email address your invitation was sent to**. Using a different email will not connect you to your account.
- 3 Enter your phone number, then set a password and confirm it.
- 4 Check the box to agree to the Terms and Conditions, then click **Sign up**.

TIP You can also click **Continue with Google** instead of setting a password, as long as the Google account uses the same email your invitation was sent to. If you start with Google, you can add a password later from your profile. If you start with a password, you cannot link Google afterward, so choose Google first if you want both.



app.healthaide.io

Healthaide

Create Account

Already have an account? [Log in](#)

Full Name *

John Smith

Email Address

john.smith@email.com

Phone Number *

(555) 123-4567

Password

Confirm Password

Sign up

☐ I agree to the [Terms & Conditions](#) and [Privacy Policy](#)

OR CONTINUE WITH

 Google

[Terms](#) [Privacy](#) [Payments](#) [Contact](#)

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The Create Account screen at app.healthaide.io. Use the email your invitation was sent to.

LOG IN AND SET UP YOUR PROFILE

- 1 Once your account is created, click **Log in** and sign in with your email and password, or with Google.
- 2 If you have access to more than one account or location, choose the one you want to work in.
- 3 Click your **profile icon in the top right**, then open your profile settings.
- 4 Add your full name, your title or role, your address if applicable, and upload a professional headshot.

NOTE Your name and photo are visible to patients in chat. A clear headshot helps patients feel comfortable knowing who they are talking to.

TIP Bookmark **app.healthaide.io** now so you always have one click access to your portal.

BEFORE MOVING ON

- ☐ My account is created with the email my invite was sent to
- ☐ I can log in and reach my portal
- ☐ My name, title, and headshot are saved
- ☐ I have bookmarked my login page

02

Set your brand identity and colors

MAKE THE PLATFORM LOOK LIKE YOUR BRAND

WHERE **Settings** › **General**

Open **Settings** in the left sidebar, then click **General**. This page controls how your business appears to patients across both portals and every email. Most fields are already filled from your intake. Confirm each one and update anything that is not exactly right.

The screenshot shows the 'Settings - General' page in the Healthaide application. The left sidebar contains a navigation menu with options like Dashboard, Patients, Tasks, Communication, Provider Network, Catalog, Earnings, Checkouts, Workflows, Sessions, Embeds, Webhooks, Settings (selected), Notifications, Location, State Coverage, Billing, Staff & Permissions, Domains, and Sell Healthaide. The main content area is divided into three sections:

- Clinic Identity**: Basic information displayed across your portal and communications. Fields include:
 - COMPANY NAME: Healthaide
 - CLINIC EMAIL: team@healthaide.io
 - CLINIC PHONE: +1 (555) 000-0000
 - MEDICAL DIRECTOR EMAIL: director@yourclinic.com
 - CLINIC DESCRIPTION: Describe your clinic's focus and patient services...
- Branding**: Logos and portal color configuration. Fields include:
 - LOGOS: Icon Logo and Horizontal Logo (both showing the Healthaide logo).
 - PORTAL COLORS:
 - Primary Color: #5C82F8
 - Accent Color: #30630B
 - Page Background: #F8EEEB
 - Sidebar Background: #FFFFFF
- Video Consult Background**: Displayed behind you during video consultations. The background is a solid blue color with the Healthaide logo.

Settings then General. Clinic Identity at top, Branding and Video Consult Background below.

CLINIC IDENTITY

Confirm the top section reads correctly. These details appear on patient communications, so accuracy matters.

Company Name The exact name patients should see. Required.

Clinic Email Your main contact email. Required.

Clinic Phone The number patients can reach you at.

Website Your main website address, if you have one.

Medical Director Email Confirm this is correct if it applies to you.

Clinic Description A short line on your focus and the patients you serve.

BRANDING: LOGOS

In the Branding section you will see two logo slots. Getting the right shape in the right slot is the most common thing clients need to fix here.

Icon Logo

A square version of your logo, used throughout the portal interface. Upload a square image.

Horizontal Logo

A wide version of your logo, used in emails to your patients. Upload a horizontal image.

TIP

To replace a logo, click the logo slot and choose your new file. Use a transparent PNG where possible so it looks clean on any background.

BRANDING: PORTAL COLORS

Below the logos, the Portal Colors section has four color fields. Each one accepts a hex code, which is the six character code that starts with a hash symbol. Click the color swatch to pick a color, or type your hex code directly into the field.

Primary Color

Buttons, active navigation, and key calls to action. Set this to your main brand color.

Accent Color

Secondary highlights and stat cards.

Page Background

The main content area background across portal pages.

Sidebar Background

The left navigation panel background.

NOTE

The Video Consult Background, shown on the right of this page, is the image displayed behind you during video consultations. To change it, click the image and upload any image you want.

CONFIRM

- ☐ Company name and clinic email are exactly right
- ☐ Square icon logo and horizontal logo both display correctly
- ☐ Primary and accent colors match my brand
- ☐ Page and sidebar backgrounds look right

03

Confirm your domains and email

MAKE SURE PATIENTS REACH THE RIGHT PLACES

WHERE **Settings** › **Domains**

Open **Settings**, then **Domains**. Our team has already connected your domains. Your job is to confirm they are active and finish the one email step that needs your domain provider.

The screenshot shows the 'Domains' settings page in the Healthaide app. The left sidebar contains navigation links: Dashboard, Patients, Tasks, Communication, Provider Network, Catalog, Earnings, Checkouts, Workflows, Sessions, Embeds, Webhooks, Settings (selected), General, Notifications, Location, State Coverage, Billing, Staff & Permissions, Domains (selected), and Sell Healthaide. The main content area is titled 'Domains' and includes a sub-header 'Configure custom domains for your clinic portal, patient portal, and email sending.' Below this are three status counters: 'Active Domains' (2), 'In Verification' (0), and 'Need Attention' (0). The 'Active Domains' section is expanded, showing 'Patient Intake Custom Domains' and 'Patient Portal Domains'. Under 'Patient Intake Custom Domains', there is a table with one row: 'intake.demo.healthaide.us' (intake root domain, SSL valid until Aug 2, 2026, Checked May 4, 3:19 PM) with an 'ACTIVE' badge. Under 'Patient Portal Domains', there is a table with one row: 'patients.demo.healthaide.us' (patient portal domain, SSL valid until Aug 2, 2026, Checked May 4, 3:17 PM) with an 'ACTIVE' badge. The 'Email Sending Domain' section shows 'noreply@healthaide.us' (Domain: healthaide.us) with an 'AWAITING DNS' badge. Below this is a table of DNS records for the email domain:

Type	Host	Value	Status
NAME	en3858.healthaide.us	u54386491.v1242.sendgrid.net	AWAITING DNS
NAME	s1._domainkey.healthaide.us	s1._domainkey.u54386491.v1242.sendgrid.net	ACTIVE
NAME	s2._domainkey.healthaide.us	s2._domainkey.u54386491.v1242.sendgrid.net	ACTIVE

At the bottom of the table, there is a note: 'Add these DNS records at your domain registrar. Propagation usually takes 5-15 minutes.'

The Domains page. Active domains show a green ACTIVE badge. The email sending domain may show AWAITING DNS until you add the records.

CONFIRM YOUR TWO PORTAL DOMAINS

At the top you will see counters for Active, In Verification, and Need Attention. Below them are two groups to confirm.

Patient Intake Domain Where patients browse your products and complete checkout and intake. Confirm it shows a green ACTIVE badge, then open it in a new tab to make sure it loads your products.

Patient Portal Domain Where patients log in to manage prescriptions and message your team. Confirm it shows ACTIVE and opens to a login page.

SET UP YOUR EMAIL SENDING DOMAIN

The Email Sending Domain section lets patient emails send from your own domain instead of ours. If it shows AWAITING DNS, add the listed records at your domain provider to verify it. A DNS record is a small setting at the company where you bought your domain.

- 1 In the Email Sending Domain section, find the table of DNS records. Each row shows a Type, a Host, and a Value.
- 2 Log in to your domain provider, the company where you bought your domain, and open its DNS settings.
- 3 Add each row as a new record: copy the Type, Host, and Value exactly. Use the small copy icon next to each value to avoid typos.
- 4 Save your records, then return to Healthaide and click **Check DNS**. Records usually verify within 5 to 15 minutes.

NOTE Until the email domain is verified, patient emails keep sending from Healthaide, so nothing breaks while you wait.

TIP Common domain providers include GoDaddy, Namecheap, Google Domains, and Cloudflare. The DNS settings are usually found under a menu called DNS, Domain, or Advanced.

CONFIRM

- ☐ My patient intake domain shows ACTIVE and loads my products
- ☐ My patient portal domain shows ACTIVE and opens a login page
- ☐ I have added the email DNS records, or asked my team for help

04

Invite your team

GIVE YOUR STAFF THE RIGHT ACCESS

WHERE **Settings** › **Staff & Permissions**

Open **Settings**, then **Staff & Permissions**. Click **Invite User** to open a guided four step flow. There are three role levels to choose from.

Owner

Full access, including billing and ownership transfer. There can only be one Owner.

Admin

Full access except removing or replacing the Owner. Good for operations managers.

User

Custom access. You choose exactly which pages and actions they can view or manage.

Email	Status	Invited By	Locations	Expires At	Created	Actions
raed.elmajdoub@gmail.com	ACCEPTED	Kris Zizzo	Healthaide Kris's Account	Jul 16, 2026	Jun 16, 2026	
EL.rohaidesoftwares.com	ACCEPTED	Kris Zizzo	Healthaide	Jul 16, 2026	Jun 16, 2026	

The Invite User flow. Four steps run down the left: Contact Information, Locations and Roles, Permissions Setup, Review and Send.

THE FOUR STEP INVITE FLOW

- 1 Contact Information.** Enter the team member's email address and an optional welcome message, then click **Next**.
- 2 Locations & Roles.** Choose which location or locations they can access, then assign their role as Admin or User.
- 3 Permissions Setup.** If you chose User, toggle what they can view or manage for each page. If you chose Admin, this is set for you.
- 4 Review & Send.** Check the summary, then send. They receive an email invite that expires in 30 days.

05

Review and publish your catalog

CONFIRM WHAT PATIENTS CAN BUY

WHERE **Catalog** › **Products**

Open **Catalog**, then **Products**. Your catalog is already loaded. Your pricing decisions run directly on top of the billing, so start there.

HOW YOUR BILLING WORKS

Every product has a cost of goods sold, which is the hard cost of delivering it. That cost is the product cost plus shipping plus the exam fee, combined. This is what Healthaide charges you to fulfill the order.

PRODUCT COST

+

SHIPPING

+

EXAM FEE

=

COST OF GOODS SOLD

You set the **retail price**, which is what the patient pays. Everything above your cost of goods sold is yours. That is why the profit column shows money you earn directly on every order.

RETAIL PRICE

what the patient pays

-

COST OF GOODS SOLD

=

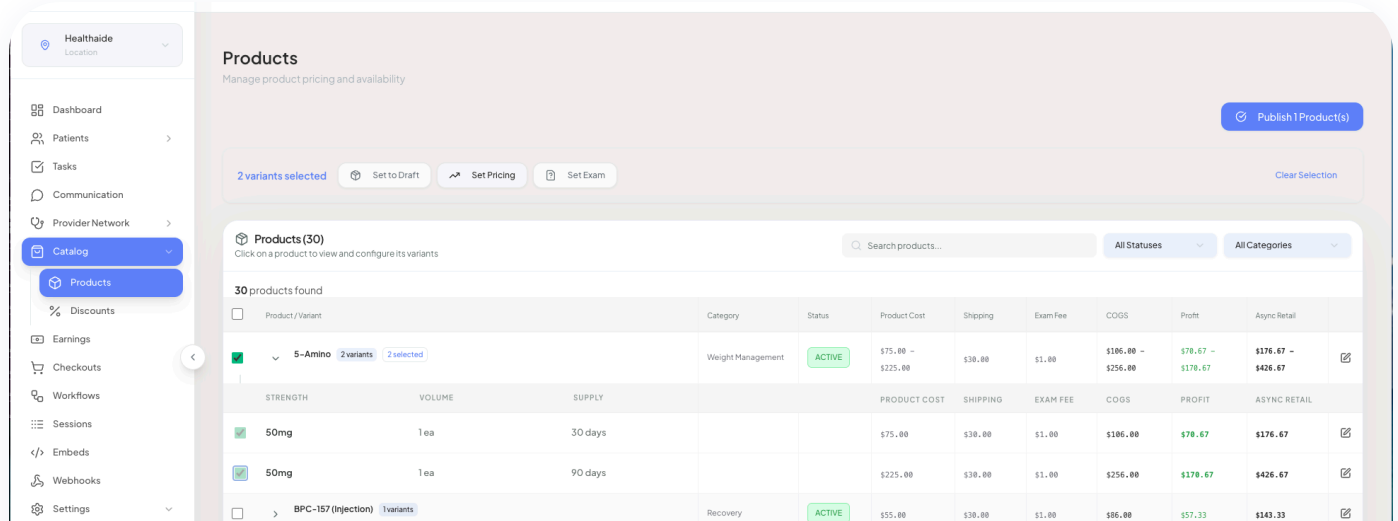
YOUR PROFIT

NOTE

If a medication requires a synchronous video visit, that additional visit cost is passed to the patient at checkout. It does not come out of your margin, so it never affects your bottom line.

UNDERSTAND THE PRODUCTS TABLE

Each row is a product. Many products have variants, which are the specific options a patient can choose, such as strength, volume, and supply length. Each variant carries its own cost and its own retail price. Click the arrow on the left of a product to expand its variants. A product marked **No exam** needs an exam attached before it can go live.



The screenshot shows the Healthaide interface with a sidebar on the left containing navigation links: Dashboard, Patients, Tasks, Communication, Provider Network, Catalog (selected), Products (selected), Discounts, Earnings, Checkouts, Workflows, Sessions, Embeds, Webhooks, and Settings. The main content area is titled "Products" with the subtitle "Manage product pricing and availability". At the top right of the main area is a "Publish Product(s)" button. Below this is a section with "2 variants selected" and buttons for "Set to Draft", "Set Pricing", and "Set Exam", along with a "Clear Selection" link. The main table displays "Products (30)" with a search bar and filters for "All Statuses" and "All Categories". The table has columns: Product / Variant, Category, Status, Product Cost, Shipping, Exam Fee, COGS, Profit, Async Retail, and an edit icon. Two products are shown: "5-Amino" (Weight Management, ACTIVE) and "BPC-157 (Injection)" (Recovery, ACTIVE). The "5-Amino" product is expanded to show two variants: "50mg" (1 ea, 30 days) and "50mg" (1 ea, 90 days). Each variant row includes the same columns as the product rows, with values for cost, shipping, exam fee, COGS, profit, and retail price.

Product / Variant	Category	Status	Product Cost	Shipping	Exam Fee	COGS	Profit	Async Retail	
☐ 5-Amino 2 variants 2 selected	Weight Management	ACTIVE	\$75.00 - \$225.00	\$30.00	\$1.00	\$106.00 - \$256.00	\$70.67 - \$170.67	\$176.67 - \$426.67	
☐ STRENGTH VOLUME SUPPLY			PRODUCT COST	SHIPPING	EXAM FEE	COGS	PROFIT	ASYNC RETAIL	
☒ 50mg 1 ea 30 days			\$75.00	\$30.00	\$1.00	\$106.00	\$70.67	\$176.67	
☒ 50mg 1 ea 90 days			\$225.00	\$30.00	\$1.00	\$256.00	\$170.67	\$426.67	
☐ BPC-157 (Injection) 1 variants	Recovery	ACTIVE	\$55.00	\$30.00	\$1.00	\$86.00	\$57.33	\$143.33	

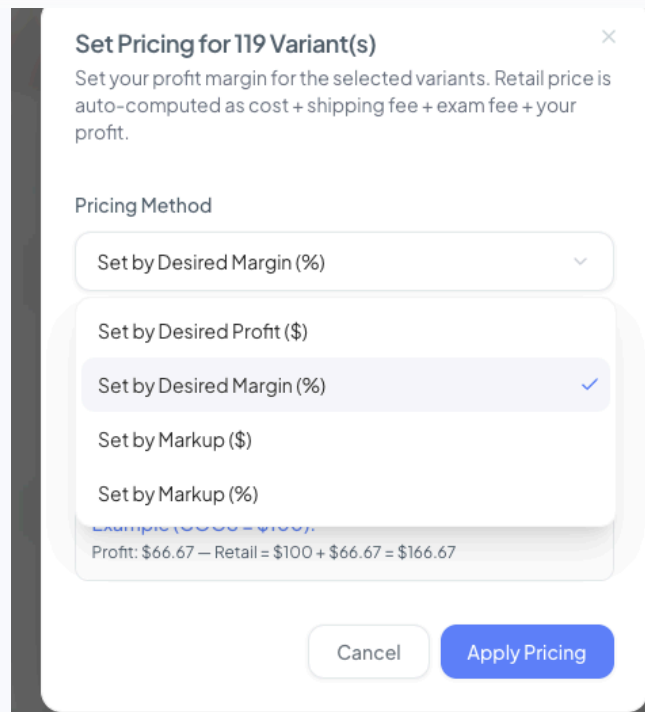
The Products page. The columns show product cost, shipping, exam fee, the combined cost of goods, your profit, and the retail price the patient pays. Check a box to price one variant or many at once.

SET YOUR PRICING

You control the price patients pay. You can price a single variant or many at once, and both start the same way, by checking a box.

- 1 To price one variant, check the box next to that single variant. To price many, check the box next to each variant you want.
- 2 A bar appears at the top showing how many are selected. Click **Set Pricing**.
- 3 Choose a Pricing Method, then enter your number. Retail is computed automatically as your cost of goods plus your profit.
- 4 Click **Apply Pricing**.

TIP The edit pencil on the right of a row is an alternative way to price a single product. Both paths set the same retail price, so use whichever you prefer.



The Set Pricing modal. Choose to price by desired margin, desired profit, or markup, then apply it to every variant you selected.

WHAT SHOULD I PRICE AT

This is the most common question. It depends on who your patients are and what they are willing to pay.

Clinics with a high touch, concierge level of service can mark medications up significantly. Med spas and doctors with established credibility and a higher end clientele often justify a 60 to 70 percent margin, and closer to 100 percent on some medications. Clients who are strong marketers and drive high volume to their site tend to set margins between 20 and 40 percent.

As a starting point, Healthaide typically sets pricing to a 40 percent margin across all medications. It is a strong baseline. Some medications can carry more, and some should sit lower to meet your buyer where they are. Research the telehealth providers most similar to your clinic, then price to match the market you serve.

PUBLISH YOUR PRODUCTS

A product is only visible to patients once you publish it.

- 1 Confirm each product you want live has its pricing set, and an exam attached where required.
- 2 Check the box next to the products or variants you want to make live.
- 3 Click **Publish** in the top right to make them visible on your intake site.

CONFIRM

- ☐ Every product I want live has the correct retail price
- ☐ Products marked No exam have an exam attached before publishing
- ☐ Products I do not offer are left unpublished
- ☐ I have published everything I want patients to see

06

Run a test order and go live

PROVE THE WHOLE PATH WORKS

WHERE **Catalog** > **Discounts**

Before you send a single patient to your site, place one real order yourself. The cleanest way is to create a discount code, use it to check out on your live intake site, then confirm the order lands correctly. This tests checkout, intake, payment, and your portal in one pass.

HOW DISCOUNTS WORK

A discount can be a fixed dollar amount or a percentage of the retail price. Either way, the discounted amount comes out of your profit. Your cost of goods sold is never discounted, because that is a hard cost of fulfillment. When you give a patient 10 percent off, that 10 percent is subtracted from what you would have earned, not from what Healthaide charges to deliver the order.

Discounts

Create and manage discount codes for your customers

[+ Create Discount](#)

%

CHRIST10
Christmas 10%

Discount

\$20.00

Users

0 (unlimited)

Valid

Dec 13, 2026 - -

3 products

0 Used

Active

✎

🗑

%

TEST1DOLLAR
TEST1DOLLAR

Discount

\$1.00

Users

1 (unlimited)

Valid

No Date Limit

All Products

1 Used

Active

✎

🗑

%

TEST10
Test 10% Off

Discount

10%

Users

1 (unlimited)

Valid

No Date Limit

All Products

1 Used

Inactive

✎

🗑

The Discounts page. Each code shows its discount amount, how many patients can use it, its validity, and whether it is active.

STEP ONE: CREATE A TEST DISCOUNT CODE

- 1 On the **Discounts** page, click **Create Discount** in the top right.
- 2 Name it something you will recognize, like **TESTORDER**.
- 3 Set the amount high enough to make the order inexpensive for your test, for example a large percentage off.
- 4 Save the code.

TIP A large percentage off keeps your test order cheap while still running a real payment through the full system. You will disable this code before you go live.

STEP TWO: PLACE THE ORDER ON YOUR LIVE SITE

- 1 Open your **patient intake domain**, the same site a patient would use.
- 2 Select a product and go through checkout exactly as a patient would.
- 3 Complete the intake exam. Confirm the correct exam loads for that product and your state.
- 4 Enter your **test discount code** at checkout, then complete payment.

STEP THREE: CONFIRM IT WORKED

- 1 Check that you receive the order confirmation.
- 2 Open your portal and confirm the order appears with the right details.
- 3 Log in to your **patient portal domain** to confirm the patient view looks correct.

You are ready to go live

Once your test order clears end to end, your platform is open for business. Disable your test discount code, then share your intake domain with patients, add it to your website, and start taking orders.

FINAL GO-LIVE CHECKLIST

- ☐ Test discount code created
- ☐ Order placed on my live intake site with the code
- ☐ Correct exam loaded for the product and state
- ☐ Order confirmation received and visible in my portal
- ☐ Patient portal view looks correct
- ☐ Test code disabled and I am ready to share my site

Support and next steps

Here is where to go when you need help.

Your Slack channel

Your fastest line to our team. Use it for catalog changes, pricing updates, exam requests, and any question during setup. We respond quickly during business hours.

In-platform support

Support is available inside your portal. Reach out there for account and technical questions any time.

Video training library

Short, screen by screen walkthroughs of every part of your portal. Watch what you need, when you need it.

Knowledge base

Written answers to the most common questions, kept current as the platform grows.

That's it. Your platform is live.

Configure, confirm, go live. You have everything you need to start seeing patients today.



Full-stack telehealth infrastructure

healthaide.io