testconfirm

TestConfirm Partner Portal Customer Service User Manual

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Account registration

When you sign a Partner agreement with TestConfirm, a Confirm BioSciences customer service representative will set up your new Partner account in the TestConfirm system.

As a new Partner, you will receive an email informing you your account has been created. This email will contain:

- your Partner username (your email address),
- a temporary password, which you can change after logging in,
- the URL to the TestConfirm backend,
- links to reference material about using TestConfirm, and
- contact information for TestConfirm.

Clients

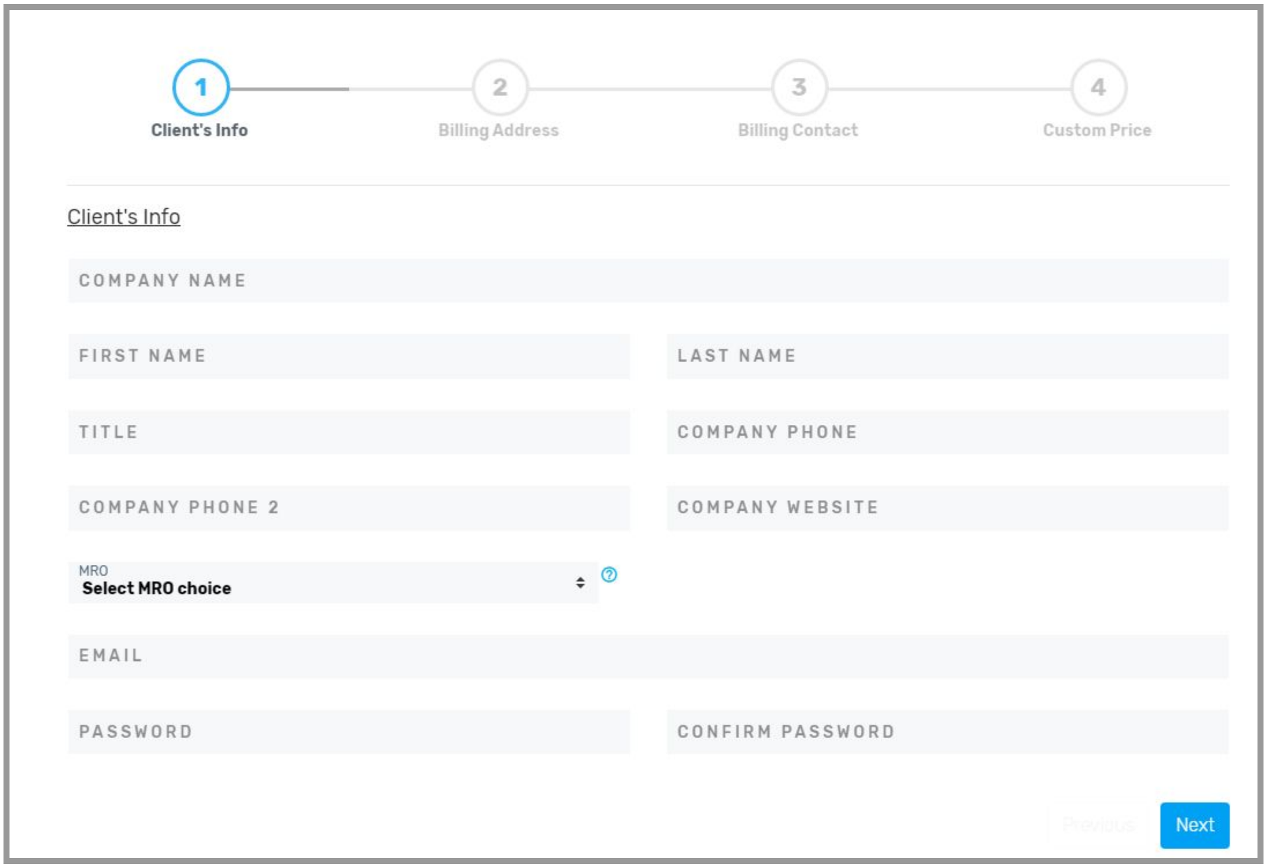
As a Partner, upon logging in for the first time, https://testconfirm.com/corp/partner/loginp.php, you will land on the Clients page. On this page, you can add and manage all of your clients.

Your clients will each be given an ID number that is used by the internal TestConfirm system. You may see these numbers on some of the buttons in tables in the columns marked "ID."

Adding Clients

The process to add a client is as follows:

- Click the blue Add Client button in the upper left corner of the Clients table. This will open the Add Client popup window.
- Fill in all the required fields in the Add Client popup window's first pane.
- Fill in the client's billing address (verified by the UPS database).
- Verify that the client's billing address is the same as their shipping address or add their shipping address (verified by the UPS database).
- Fill out additional billing or general contact information for the client (optional).
- Enter Custom Pricing information for devices purchased by the Client.



Note that “My Price” is what you, the Partner, pays for each individual device and the Custom Price is what your Client pays for each individual device. Your client will see this Custom Price when they order new inventory.

When a client is added to your backend account, that new client will receive a welcome email to TestConfirm sent to the email address you have entered as their username with the temporary password you have given them.

Editing Clients

On the Client page, you can take various actions on a Client’s account, listed in the Actions column.

Edit

You can edit a Client’s account by clicking the blue Edit button. This will open an informational popup window about that particular client, which contains the following tabs:

- Company Info

- Other Contact
- Integration
- Password

Using this popup window, you can change your Client's company information, contact information and password.

Integration

The Integration tab shows a Client's Netsuite ID for billing purposes.

On this tab, you can:

- Change the Type of account your Client has (It will default to company)
- Change the Mode of the Client's account (Partners will default to full mode)
- Change the Confirm BioSciences Sales Representative who is assigned to the Client's account.
- Change the Lab Process to send tests to an outside lab unaffiliated with TestConfirm. (It always defaults to No and has to be manually changed for Partners that have partnerships with labs outside of the Confirm BioSciences network.)

Deleting and Deactivating Clients

You can completely delete a Client's account by clicking the red Delete button in the Actions column and confirming that choice.

If you do not want to completely delete a Client's account, but that account does not need to be active, you can also simply Deactivate the account by clicking the yellow Deactivate button and confirming the action.

Deactivated Clients' rows in the Clients table will turn a dark gray color.

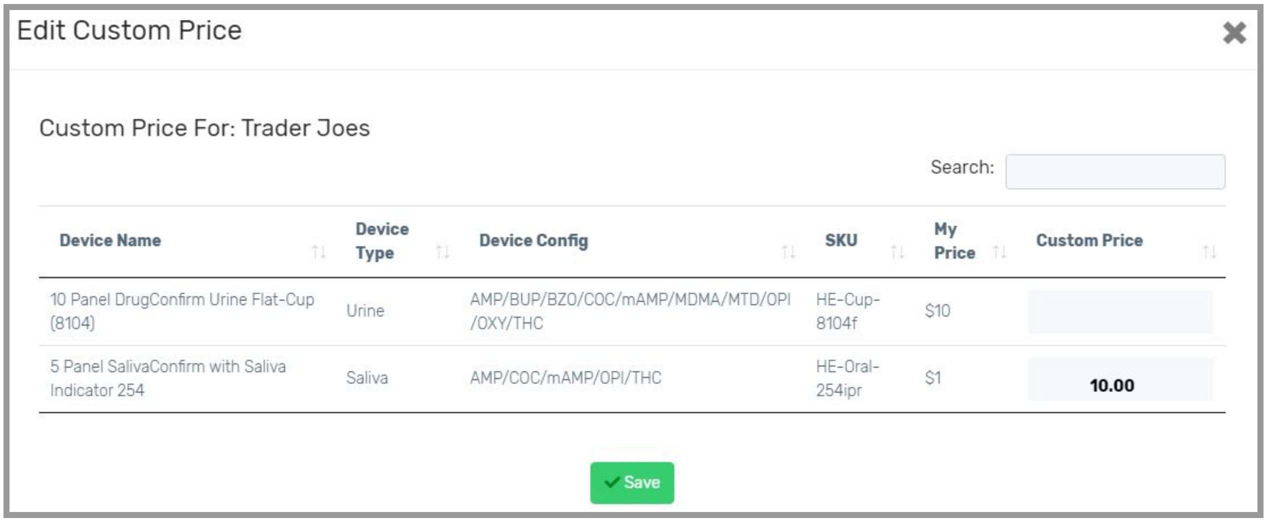
Edit Custom Prices

From the Clients page, you can also edit a Client's Custom Prices for the devices they order by clicking the blue Edit button in the Custom Prices column. Clicking the Edit button will cause a popup window to appear showing all the devices assigned to a Client.

Prices can be edited by typing in a price in the Custom Price column or by using the up and down counter arrows.

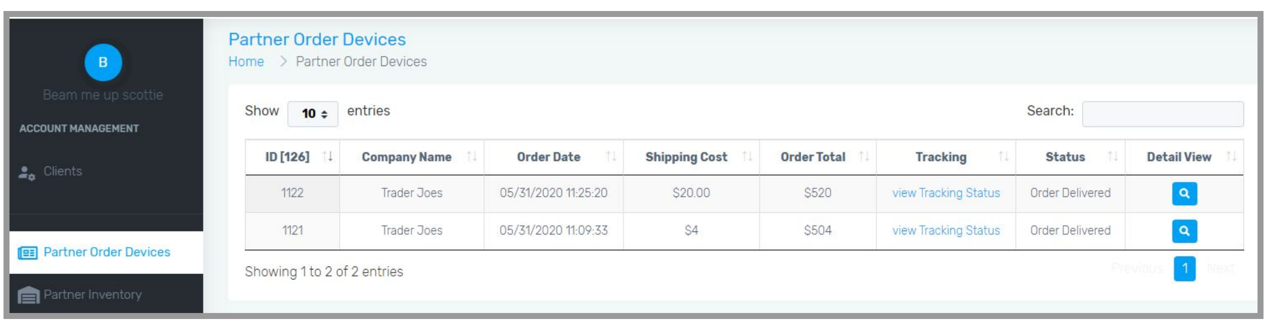
Note that Clients can only order devices that have prices assigned to them. If you want to remove a device from a client's list of eligible devices to order, you can simply delete the price associated with that kit and the client will no longer see it on their list of devices they can order.

When you are done editing and/or adding prices, click the green Save button at the bottom of the popup window.



Partner Order Devices

The Partner Order Devices page is where Partners can go to see pending orders and current inventory levels for all of their clients. You can see all orders that have been placed by your clients and the status of those various orders.



If you want to view an order in more detail, you can click on the blue magnifying glass button in the Detail View column. This will open a popup window with a detailed view of that order.

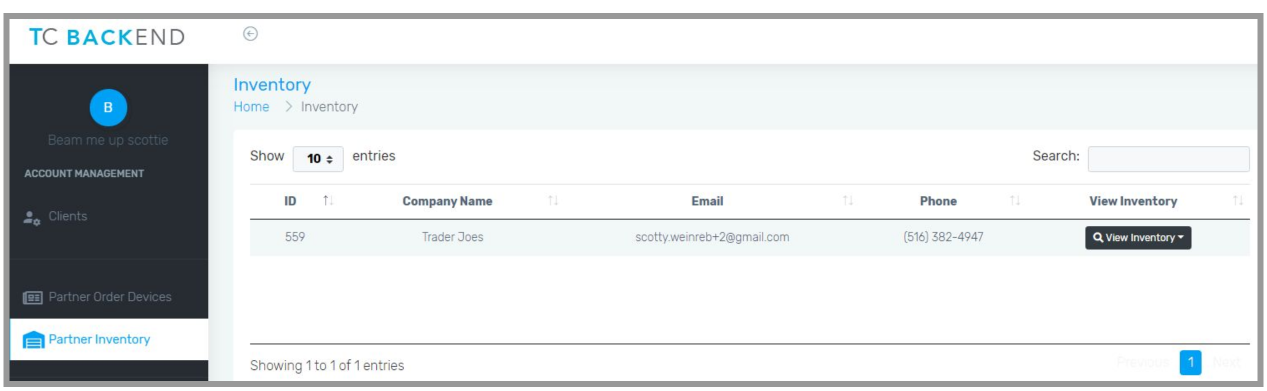
If the order is currently being shipped, a tracking link will be visible in the Tracking column of the table. You can click on this tracking link and be taken to the UPS website where you can view the tracking details of the shipment.

Note that the Partner Order Devices page and the popup detail windows are read-only pages. Neither the table on this page nor the popup windows can be edited.

Partner Inventory

The Inventory page is where you can see all the current inventory levels at all of your clients' locations.

To view the inventory for a specific client, click the gray View Inventory button in a given client's row. You will be given the option to view the inventory in two different ways: by Devices or by Locations. Both options give you the same information. It is just organized in different ways.



View Devices

If you choose View Devices, it will open a popup window showing all the devices available to the Client.

If you click the + in a row, it will expand that row and you will be able to see the Client locations that have that device, how many devices are at each location, the minimum quantity set for each location and the reorder quantity set for each location.

Devices Inventory ✖

	Type	Name	Panel	Brand	Configuration
−	Urine	10 Panel DrugConfirm Urine Flat-Cup (8104)	10	DrugConfirm	AMP/BUP/BZO/COC/mAMP/MDMA/MTD/OPI/OXY/THC

Location Name	Available Qty	Min Inventory Qty	Reorder Qty
Headquarters	23	50	25

	Type	Name	Panel	Brand	Configuration
−	Saliva	5 Panel SalivaConfirm with Saliva Indicator 254	5	SalivaConfirm	AMP/COC/mAMP/OPI/THC

Location Name	Available Qty	Min Inventory Qty	Reorder Qty
Headquarters	45	50	25

View Location

If you click View Location, it will open a popup window listing all of that client's locations. If you click the +, it will give you a list of all the devices for that location, along with their type, configuration, available quantity, minimum quantity and reorder quantity.

Location Inventory ✖

	Location	Address	Location Phone #	Total Units
+	Headquarters	1571 Pennsylvania Ave, Miami Beach, fl 33139		68
+	Publix	1571 Pennsylvania Ave, Miami Beach, fl 33139	(516) 382-4947	0

Accounting

The accounting section of the TestConfirm Partner Portal has three main sections:

- Billing Lab Confirmation
- Percent Utilization Report
- Billing Device Orders

Billing Lab Confirmation

This is where you process an invoice to the client for any testing kits that were sent to a laboratory.

You can create an invoice in one of two ways:

1. By company
2. In bulk

Create Invoice by Company

If you go to the Create Invoice by Company page, you can see all of your clients. To see all of the orders that you can generate an invoice for, click the blue Client ID button in the ID column. This will open a popup window showing you all the laboratory orders that you can generate an invoice for.

Click the boxes in the Select column to select the lab orders you want to generate an invoice for and then click the green Create Invoice button on the bottom of the popup window. All the orders you've selected will appear on an invoice, which will appear on a popup document.

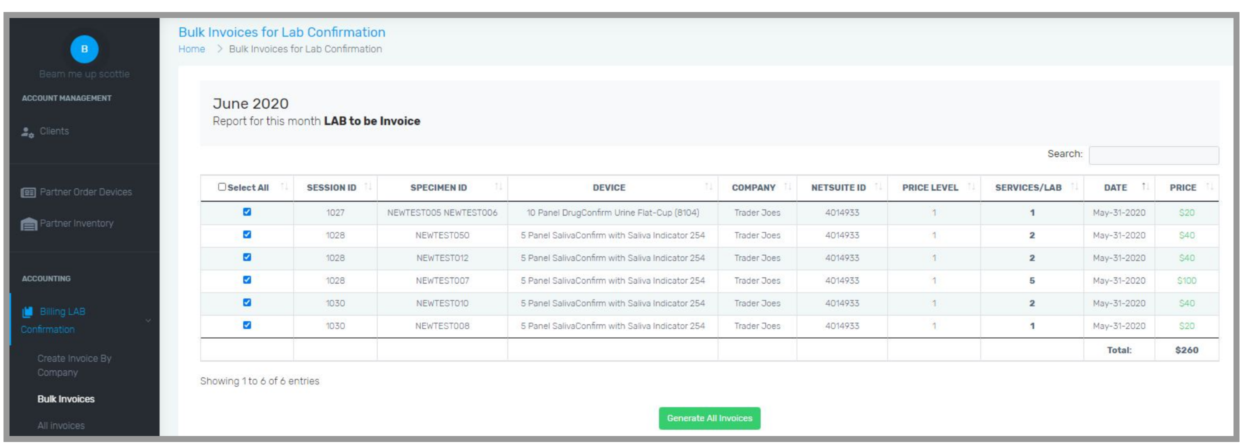
Review the information on the newly created invoice and click the blue Proceed to Create Invoice button on the bottom to generate the official invoice. Once the invoice has been created, you will see a green confirmation message at the bottom of the page.

Select All	ID	SPECIMEN ID	DEVICE	PRICE SERVICE/LAB	SERVICES/LAB	DATE	PRICE
☐	1030	NEWTEST051	5 Panel SalivaConfirm with Saliva Indicator 254	A	**1**	May-31-2020	$20.00
☐	1028	NEWTEST050	5 Panel SalivaConfirm with Saliva Indicator 254	A	**2**	May-31-2020	$40.00
☐	1028	NEWTEST012	5 Panel SalivaConfirm with Saliva Indicator 254	A	**2**	May-31-2020	$40.00
☐	1030	NEWTEST010	5 Panel SalivaConfirm with Saliva Indicator 254	A	**2**	May-31-2020	$40.00
☐	1030	NEWTEST008	5 Panel SalivaConfirm with Saliva Indicator 254	A	**1**	May-31-2020	$20.00
☐	1028	NEWTEST007	5 Panel SalivaConfirm with Saliva Indicator 254	A	**5**	May-31-2020	$100.00
☐	1027	NEWTEST005+NEWTEST006	10 Panel DrugConfirm Urine Flat-Cup (8104)	A	**1**	May-31-2020	$20.00
							Total:

Bulk Invoices

If you want to create invoices for all outstanding laboratory orders at the same time, click Bulk Invoices in the left hand navigation bar and scroll down to the bottom of the page and click the green Generate All Invoices button.

This will generate separate invoices for all the outstanding laboratory orders at the same time.



Select All	SESSION ID	SPECIMEN ID	DEVICE	COMPANY	NETSUITE ID	PRICE LEVEL	SERVICES/LAB	DATE	PRICE
☑	1027	NEWTEST005 NEWTEST006	10 Panel DrugConfirm Urine Flat-Cup (8104)	Trader Joes	4014933	1	**1**	May-31-2020	$20
☑	1028	NEWTEST050	5 Panel SalivaConfirm with Saliva Indicator 254	Trader Joes	4014933	1	**2**	May-31-2020	$40
☑	1028	NEWTEST012	5 Panel SalivaConfirm with Saliva Indicator 254	Trader Joes	4014933	1	**2**	May-31-2020	$40
☑	1028	NEWTEST007	5 Panel SalivaConfirm with Saliva Indicator 254	Trader Joes	4014933	1	**5**	May-31-2020	$100
☑	1030	NEWTEST010	5 Panel SalivaConfirm with Saliva Indicator 254	Trader Joes	4014933	1	**2**	May-31-2020	$40
☑	1030	NEWTEST008	5 Panel SalivaConfirm with Saliva Indicator 254	Trader Joes	4014933	1	**1**	May-31-2020	$20
								Total:	**$260**

All Invoices

To see all the laboratory invoices you've generated, click on All Invoices on the left navigation panel. This will take you to the All Invoices page. To see the details of a specific invoice, click on the Invoice Number in the Invoice # column, which will open a popup document of the invoice.

Percent Utilization Report

This is where you can see what overall percentage of kits is being sent to a laboratory. The table shows you your client list with how many kits each client has used, how many of those kits have been sent to the lab and the preliminary **instant testing** results (presumptive positive, presumptive negative, presumptive inconclusive). It also shows you the percentage of kits that were sent to the laboratory (the percent of total kits sent to a laboratory).

Utilization Rate Reporting

Home > Utilization Rate Reporting

Show 10 entries Search:

Company Name	Email	Total Kits Tested	Sent to Lab	Prelim Positive	Prelim Negative	Prelim Inconclusive	Lab Utilization
Trader Joes	scotty.weinreb+2@gmail.com	9	7	7	6	0	77.78 %

Showing 1 to 1 of 1 entries Previous 1 Next

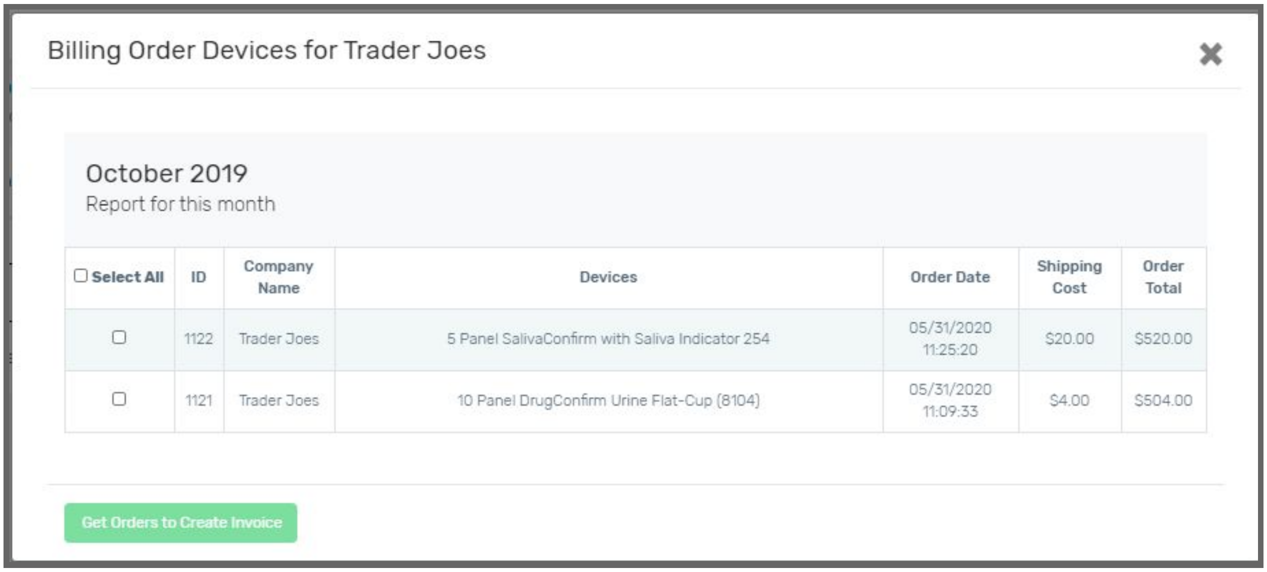
Billing Device Orders

This is where you can process invoices for testing kits ordered by your clients.

Create Invoice by Company

You can create invoices by company by clicking on a Client ID number in the ID column. This will open a popup window where you can select all the outstanding orders. Using the Select column, you can select which orders you want to generate an invoice for. All the orders you select at the same time will go on the same invoice.

When the invoices have been created, you will see a green confirmation message at the bottom of the screen.


Billing Order Devices for Trader Joes

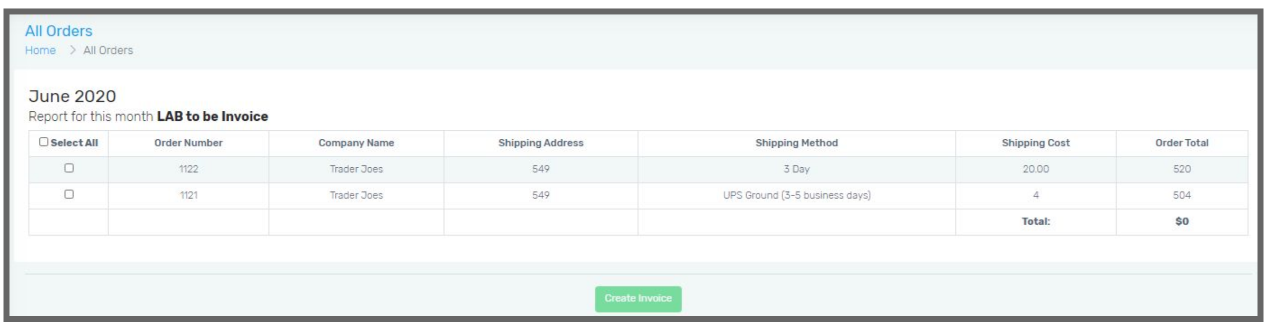
October 2019
Report for this month

Select All	ID	Company Name	Devices	Order Date	Shipping Cost	Order Total
	1122	Trader Joes	5 Panel SalivaConfirm with Saliva Indicator 254	05/31/2020 11:25:20	$20.00	$520.00
	1121	Trader Joes	10 Panel DrugConfirm Urine Flat-Cup (8104)	05/31/2020 11:09:33	$4.00	$504.00

Get Orders to Create Invoice

Bulk Invoices

To create invoices for all your outstanding orders, go to Bulk Invoices and click Select All and then click the green Create Invoices button at the bottom. All the outstanding orders will be put on their own individual invoices.


All Orders
Home > All Orders

June 2020
Report for this month **LAB to be Invoice**

Select All	Order Number	Company Name	Shipping Address	Shipping Method	Shipping Cost	Order Total
	1122	Trader Joes	549	3 Day	20.00	520
	1121	Trader Joes	549	UPS Ground (3-5 business days)	4	504
					Total:	**$0**

Create Invoice

All Orders Invoices

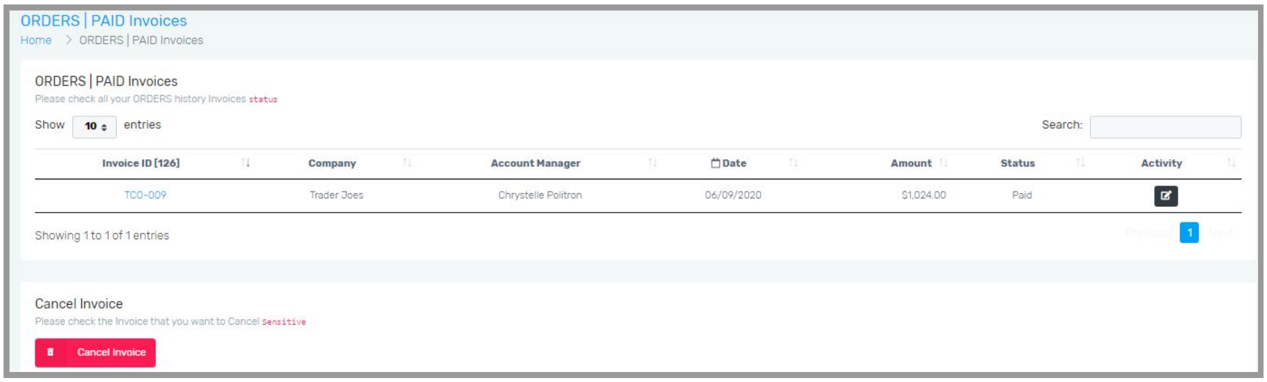
To see all the laboratory invoices you've generated, click on All Orders Invoices on the left navigation panel. This will take you to the All Orders Invoices page. To see the details of a specific invoice, click on the Invoice Number in the Invoice # column, which will open a popup document of the invoice.

Pending Invoices

To see all the device order invoices you've generated that have not yet been paid, click on Pending Invoices on the left navigation panel. This will take you to the Pending Invoices page. To see the details of a specific invoice, click on the Invoice Number in the Invoice # column, which will open a popup document of the invoice.

Paid Invoices

To see all the device order invoices you've generated that have not yet been paid, click on Pending Invoices on the left navigation panel. This will take you to the Pending Invoices page. To see the details of a specific invoice, click on the Invoice Number in the Invoice # column, which will open a popup document of the invoice.



Failed Payments

This page will show you any payments that your clients have made that were not processed successfully.