USER MANUAL

ZYTO COMPASS

ZYTO Compass User Manual
Copyright © 2017 All rights reserved

CTC-10101.B

Table of Contents

Table of Contents ..... **ii**
Getting started **1**
About the Compass 1
About the Compass software and hardware 1
Installing the Compass 1
About installing the Compass on multiple computers 2
About starting the Compass 2
The Compass scan **3**
About the Compass main menu 3
Adding a new client 3
Opening a returning client 4
About the Compass scan 4
Understanding the Compass report 4
Adding report customization 5
Emailing and printing the report 5
Ending a scan 5
Administration **6**
About Administrative Settings 6
Viewing session reports 6
Viewing client reports 7
Editing client information 7
Archiving a client 8
Viewing archived clients 8
Updating your account settings 8
Performing a Hand Cradle check 9
Selecting the software language 9
Setting up email 9
Syncing the Compass software 10
Viewing the product list 10
Releasing the Compass license 10
Accessing the Compass Dashboard 11
Accessing Compass Help 11
Selecting your product region 11

Chapter 1

Getting started

About the Compass **1**
About the Compass software and hardware **1**
Installing the Compass **1**
About installing the Compass on multiple computers **2**
About starting the Compass **2**

About the Compass

The ZYTO Compass is the original and trusted wellness scanner used by thousands of health-minded individuals. Using innovative biocommunication technology, the Compass system helps customers maintain general wellness by providing individualized information when choosing nutritional products, oils, and supplements.

About the Compass software and hardware

Your ZYTO Compass purchase includes a software and hardware component. The software portion of your Compass purchase is downloaded using the Internet.

You will not receive a separate installation CD. The link to download your software, along with installation instructions, is included in your welcome email from ZYTO.

Additionally, installation instructions can be found in the next section of this manual.

The hardware portion of your Compass purchase includes a Hand Cradle and USB cord.

The software Terms of Service and User Agreement can be viewed online at: https://www.zyto.com/company/termsconditions.

Installing the Compass

The ZYTO Compass software is downloaded through the Internet. You will not receive an installation CD.

To install the Compass software:

1. In your web browser, go to http://www.zyto.com/technical-support/software.
2. On the **Software Download** page, under **ZYTO Compass**, click **Download**.
3. When the installation is complete, the Compass software will open and you will see the Software License Agreement. These are the same terms you accepted when you purchased the Compass system. Review and click **I Agree** to accept the terms of the agreement.

4. Enter your ZYTO ID and password to log into the software. Your ZYTO ID is the email address you used to create your ZYTO account when purchasing the Compass system. You will receive another email from ZYTO with a personalized link to create your password.
5. If you have more than one license, you will be prompted to select a license. Click a license to claim that license. Most Compass users will only have one license available, which the software will automatically claim.
6. Your software will begin a mandatory sync. Do not cancel this sync or your program will automatically close.

Once the sync is complete, your system is installed and ready to use.

About installing the Compass on multiple computers

Your software license allows you to install the software on two different computers. You will use the same download process to install the software onto the second computer.

However, you may only open and operate the software on one computer at a time. To use the installed program, you must have the software license claimed on that computer. Before you can claim your license on a different computer, you must first release the license from the computer where it is currently being used, or currently claimed.

For more information on releasing your software license, please see "Releasing the Compass license" on page 10.

About starting the Compass

After the software has been installed, there will be a Compass icon on your desktop and a ZYTO folder in your Windows Start Menu. Post installation, you can use either of these options to open the software.

Each time the Compass software opens, it attempts to sync with ZYTO's secured servers. In order to sync, you must be connected to the Internet. During the sync, your software will encrypt your session files and copy them to ZYTO's secured servers as a backup. This ensures that your information from clients and sessions is still available if you open your software on another computer. Or, if you have a computer crash, this backup will allow you to restore your data. Additionally, your computer will download any updates to the software during the sync.

Note that you do not need to be connected to the Internet to use your ZYTO software. However, the software does need to sync to ZYTO's secured servers at least once every 30 days to verify that your subscription is still active.

After the sync, you will be prompted to log in with your ZYTO ID email and PIN.

Chapter 2

The Compass scan

About the Compass main menu **3**
Adding a new client **3**
Opening a returning client **4**
About the Compass scan **4**
Understanding the Compass report **4**
Adding report customization **5**
Emailing and printing the report **5**
Ending a scan **5**

About the Compass main menu

The Compass main menu is the first screen you see after logging in. The main menu includes three options to choose from: **New Client**, **Returning Client**, and **Administrative Settings**.

- **New Client** - Click **New Client** to begin a scan with a new client whose information has never been entered into your Compass software.
- **Returning Client** - Click **Returning Client** to begin a scan with an existing client whose information has been previously entered into your Compass software.
- **Administrative Settings** - Click **Administrative Settings** to access an administration menu that allows you to perform various administrative functions in the software. These administrative functions are discussed in the next chapter.

Adding a new client

The first time you see a client, you will need to create a new client profile and enter their personal information before you can begin the scan.

To add a new client:

1. On the main menu, click **New Client**.
2. Enter the client's information in the appropriate fields. Note that required fields are highlighted in yellow. You must enter the required information to save and continue.
3. Once you have entered the required information, you can also click the **Next** arrow to proceed to additional pages that give you the options to add billing and shipping addresses and/or notes about the client. None of the fields on page 2 or 3 are required.
4. Once the required information has been input, click **Save** to begin the scan.

Opening a returning client

To begin the scan on a returning client you must first locate and open their existing client profile.

To open a returning client:

1. On the main menu, click **Returning Client**.
2. Enter the client's name in the search field. You can enter a client's first name, last name, or even just the first few letters of their name. Click the green search button to begin the search.
3. Matching client names will appear below. If there is more than one matching name, click each name to view the client's phone number and email address to verify that you are selecting the correct client.
4. When you have found the client you wish to open, click the Open Client icon next to their name and contact information. The Compass scan will automatically begin.

About the Compass scan

Once you have loaded the client (either a New Client or a Returning Client), the Compass scan automatically begins.

If the product company loaded on your Compass software has created product categories, you will be prompted to select the categories that you wish to include in the scan. Click any category to select. Selected categories will appear yellow. You can select one or more categories, or click **All Products** to select all. Click **Continue** to proceed. Note that if the product company loaded on your Compass software has not created product categories, then this screen is bypassed.

Instruct the client to place his or her hand on the Hand Cradle. On the bottom of the screen is a Hand Cradle graphic. The gray connector points on the Hand Cradle graphic will update to yellow when a connection is made. If the client removes his or her hand (or even a finger), the corresponding connector points on the Hand Cradle graphic will return to gray and the scan will pause until a full connection is reestablished.

To the right of the Hand Cradle graphic are two progress bars. The progress bar on the bottom represents the overall scan progress and the progress bar on the top tracks the progress of the portion or step of the scan that is currently happening. The scan is complete when the bottom progress bar is full.

The scan also includes an instructional video that plays when the scan begins. The video explains the Compass scan and helps the client better understand the meaning of the Compass results. Click **Hide Video** to skip the video if desired.

Instruct the client to keep his or her hand on the Hand Cradle until the scan is complete.

Understanding the Compass report

When the scan is complete, the results are displayed on the Compass report. The report appears in a PDF reader. You can increase or decrease the size of the report by clicking the **plus** or **minus** sign on the PDF reader toolbar.

At the top of the report is the report header, which includes the name of the client and the date of the scan. The next section shows a graphical representation of the client's baseline and the total number of initial biomarkers out of range. This is followed by the recommended products and their associated biomarker graphic. At the end of the report appears the product descriptions of the recommended products.

Adding report customization

There are a few customization changes that you can make to the Compass report. These changes include adding return visit information and notes, making client notes for your own records, and turning on or off the product descriptions feature.

To add report customization:

1. Click the **Report Edit** icon in the top right of the screen.
2. On the Report Edit window, click either **Return Visit/Notes**, **Client Notes**, or **Show Descriptions**.

Return Visit/Notes opens the Notes window where you can add customized information to the top of the report. This includes the ability to add a **Return Visit Date** and **Return Visit Time**, edit the standard **Report Header**, and add any specific client notes or instructions for the client. These notes are specifically for the client and are included in the top portion of this report. Click **Save** to return to the Report Edit window.

Client Notes allows you to add specific notes about the client for your own records. The software automatically includes the date and time of the note. These notes will not appear on the client report, and are intended to be used for your personal records only. Click **Save** to return to the Report Edit window.

Show Descriptions allows you to turn on or off the product descriptions on the report. By default, the product descriptions are included on the report, and the **Show Descriptions** icon includes a green check mark. Click **Show Descriptions** to add or remove the green check mark.

When you are done with the Report Edits window, click **Close** to return to the Compass Report.

Emailing and printing the report

Before ending the scan it is recommended that you print and/or email the report so that your client has their own copy.

You can email a report to your client by clicking the **Email** icon in the top right of the screen.

Note that in order to email the report, you must first set up your email within the Compass software. For more information, please see "Setting up email" on page 9.

You can print the report by clicking the **Print** icon in the PDF reader toolbar.

Ending a scan

When you are done viewing the report, click **Close** in the top right of the screen. You will automatically return to the Compass main menu.

Chapter 3

Administration

About Administrative Settings 6
Viewing session reports 6
Viewing client reports 7
Editing client information 7
Archiving a client 8
Viewing archived clients 8
Updating your account settings 8
Performing a Hand Cradle check 9
Selecting the software language 9
Setting up email 9
Syncing the Compass software 10
Viewing the product list 10
Releasing the Compass license 10
Accessing the Compass Dashboard 11
Accessing Compass Help 11
Selecting your product region 11

About Administrative Settings

The Compass main menu includes the **Administrative Settings** option. Click **Administrative Settings** to access the administration menu, which includes 13 different options that allow you to perform various administrative tasks in the software.

Some of these administrative tasks include viewing client and session reports, setting up your email within the software, changing the software language settings, and releasing the software license.

All of the administrative options are discussed in the following sections.

Viewing session reports

The Compass software gives you the ability to view past session reports of client sessions. You can access these reports to view and compare past session history. This feature is also useful in case you need to resend a report to a client.

To view session reports:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Session Reports**.

3. Enter the client's name in the search field. You can enter the client's full name, first name, last name, or even as little as the first few letters of their name. Click the green search button to begin the search.
4. Matching client names will appear below. If there is more than one matching name, click each name to view the client's phone number and email address to verify that you are selecting the correct client.
5. You can also see a report icon and the number of past session reports that are available. Click the report icon to view the past session reports sorted by the date and time of the Compass scan.
6. Click the report icon of the individual report you wish to open.

You can now view the past session report and also print or email the report to the client.

Viewing client reports

The Compass software also includes the ability to run reports based on the client information you have entered.

There are two types of reports that you can view: **Contacts By Date**, which allows you to view and export a list of clients you have assessed using different date ranges, and **Referred By**, which allows you to view and export a list of people that have referred clients to you (as long as you added that information to the client's profile).

To view the Contacts By Date report:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Client Reports > Contacts By Date**.
3. Enter the date range you prefer. For example, you may want to view all of the clients you scanned during a particular weekend, or during a particular month. You can also view all clients regardless of date by clicking **Show All Assessed Clients**.
4. The search results will automatically populate with the client names and email addresses.
5. To view and save the report as a CSV file (which you can open as an Excel spreadsheet), click **Export List** at the bottom of the screen. You will be prompted to save the report as a CSV file somewhere on your computer. The saved CSV file will display all of the clients and the contact information that was entered on their profile.

To view the Referred By report:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Client Reports > Referred By**.
3. Enter the referrer's name into the search bar. The number of clients referred by that person will appear.
4. To view the full report, click **Export List** at the bottom of the screen. You will be prompted to save the report as a CSV file somewhere on your computer. The saved CSV file will display all of the clients (and the information that was entered for them) for the selected referrer.

Editing client information

After you have added a new client, you can access their client profile at any time to make any edits or updates to their client information, such as updating their email address.

To edit client information:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Edit Client Info**.
3. Enter the client's name in the search field. You can enter a client's first name, last name, or even just the first few letters of their name. Click the green search button to begin the search.

4. Matching client names will appear below. If there is more than one matching name, click each name to view the client's phone number and email address to verify that you are selecting the correct client.
5. When you have found the client you wish to open, click the Open Client icon next to their name and contact information to open their client profile.
6. Make any edits or updates to the client profile fields. Remember that you can click the **Next** arrow to view and edit additional information, including notes you have entered for the client.
7. Click **Save** to update all changes.

Archiving a client

There may be times that you wish to archive a client file (for example, if you accidentally created a duplicate client profile, or if you have a client that you are no longer regularly seeing). Archived clients no longer appear in search results.

To archive a client:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Edit Client Info**.
3. Enter the client's name in the search field. You can enter a client's first name, last name, or even just the first few letters of their name. Click the green search button to begin the search.
4. Matching client names will appear below. If there is more than one matching name, click each name to view the client's phone number and email address to verify that you are selecting the correct client.
5. When you have found the client you wish to archive, click the Open Client icon next to their name to open their client profile.
6. At the bottom of the client profile page, click the **Archived** check box. The check mark indicates that the client has been archived and will no longer appear in your search results unless you click **Show Archived** below the search field.
7. Click **Save** to update your changes.

Viewing archived clients

There may be times when you need to view clients that you have previously archived (for example, if you need to make an archived client's profile active again).

To view archived clients:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Edit Client Info**.
3. Click **Show Archived** below the search field.
4. Enter the client's name in the search field. You can enter a client's first name, last name, or even just the first few letters of their name. Click the green search button to begin the search.
5. Matching client names will appear below. Archived clients will appear in the search results with the word "Archived" next to their name.
6. When you have found the client you wish to view, click the Open Client icon next to their name to open their client profile.
7. If desired, you can remove the client's profile from the archive. Click the **Archived** check box to remove the check mark.
8. Click **Save** to update your changes or **Cancel** to exit without making any changes.

Updating your account settings

The Compass also includes the ability to edit your account settings. Options include editing your ZYTO ID and password, editing your custom report header, and editing the report paper size settings.

To update your account settings:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Account Settings > Edit My ZYTO ID**.
3. If your ZYTO ID and password are saved in your Web browser, you will be automatically logged in. If not, enter your ZYTO ID and password and click **Sign In**.
   Note that you can also access your ZYTO ID settings by visiting www.zyto.com and clicking **Sign In** in the top right corner. After signing in, in the left menu, click **My ZYTO ID**.
4. From the **My ZYTO ID** page, you can edit your name, email, PIN, or password. You can also add, change, or remove a profile photo.
5. On the administration menu, click **Edit Report Header** to view or edit the information (for example, your contact information) that you wish to appear at the top of every report. Click **Save** to update any changes.
6. On the administration menu, click **Report Paper Size** to select either **Letter** or **A4** as your paper size for printing reports.

Performing a Hand Cradle check

The administration menu gives you the option to check your Hand Cradle connection without running a session.

To perform a Hand Cradle check:

1. On the main menu, click **Administrative Settings**.
2. Place your hand on the Hand Cradle and click **Hand Cradle Check** on the administration menu.
3. A pop-up message confirms whether your Hand Cradle can connect. Additionally, the finger contacts on the Hand Cradle graphic will turn gold, indicating that contact has been made.

Selecting the software language

The Compass software can be set to use a variety of different languages. Depending on the language you select, the software text and/or the video that plays during the scan will be translated. With a few exceptions (based on the product company libraries), the product names and descriptions will remain in English.

To select the software language:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Language Settings**.
3. Click the language you prefer and then click **Save**.

Note that whenever you select a new language, the Compass software will automatically close and you will need to restart the program.

Setting up email

The Compass report includes the option to email a PDF of the report directly to the client. To use this feature, you must first input your email account information into the software.

The Compass has been optimized to use the email accounts on your local email clients: either Outlook and Live Mail, and also some major Web Email Clients: Yahoo Mail, Gmail, and Hotmail.

If you use a different email service, you can also manually configure your email settings into the software.

To set up email:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Email Settings**.
3. From the list, click to select your Email Client.
   If you use a local Email client, click the check box next to **Outlook, Live Mail, Thunderbird, etc.** and proceed to the final step.
4. For Web Email Clients, click the check box next to **Yahoo Mail**, **Gmail**, **Hotmail**, or **Other**.
   If you select one of the standard Web Email Clients (**Yahoo Mail**, **Gmail**, or **Hotmail**), then enter the email and password for that email account.
5. If you select **Other**, you must enter the additional configuration information for that email account.
6. Click **Save**.

Syncing the Compass software

Use the sync feature to manually initiate synchronization between your computer and ZYTO's secured servers. During the sync, your local Compass data is encrypted and backed up on the ZYTO servers, your software license is renewed, and any updates to your software are downloaded to you; this includes changes and updates made to product libraries.

It is not necessary that you regularly initiate a manual sync of your software. Whenever you are online and open or close the software, a sync is automatically initiated. A sync also automatically occurs whenever you release your software license. However, there may be times when you want to initiate a manual sync to receive new updates without restarting the software. Remember that your software must sync at least once every 30 days.

To manually sync the Compass software:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Sync** to begin the synchronization.

Viewing the product list

The Compass software gives you the option to view a complete list of all products that are associated with your software license. This can be especially helpful if you wish to double check the product company license you have selected. Depending on the product company, you may also be able to see available products by region.

To view the product list:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Product List**.
3. If available, use the product drop-down list at the top of the window to select other regions.
   Note that this feature is not available in all product company libraries.

Releasing the Compass license

You are permitted to install your ZYTO Compass software on two different computers. However, you may only open and operate the software on one computer at a time. To use the Compass software, you must have the software license claimed on that computer.

Before you can claim your license on a second computer, you must first release it from the computer where it is currently being used, or currently claimed. You must be online to release and claim your license.

To release the Compass license:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Release License**.
3. The Compass system will automatically sync and close.

When you open the software on another computer, the newly released license will be available to claim.

Note that if you are unable to access your software, you can still release your license by clicking **Sign In** at www.zyto.com and logging into your account.

Accessing the Compass Dashboard

From within the software, you can always access the Compass Dashboard as long as you have an Internet connection. On the Compass Dashboard webpage, you can manage certain aspects of your account.

To access the Compass Dashboard:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Compass Dashboard**.
3. If your ZYTO ID and password are saved in your Web browser, you will be automatically logged in. If not, enter your ZYTO ID and password and click **Sign In**.
   Note that you can also access the Dashboard by visiting www.zyto.com and clicking **Sign In** in the top right corner.
4. On the Compass Dashboard webpage, click **Account > Edit** to make any changes to your account information. From the Account page, you can also change your billing information or release or reactivate your Compass license.
5. Click **Payment History** to view a history of your subscription payments, or click **Order History** to view past order information.
6. Click **Referral Program** to sign up for the Compass Referral Program.

Accessing Compass Help

Access the Compass Help window to view the version of the Compass software you have currently installed, the Compass customer support information, and online training options.

To access Compass Help:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Help**.

Selecting your product region

Some product companies have more than one product region that can be accessed in the software. For example, they may have certain products that are only available in certain parts of the world. Note that this feature does not appear if your product company does not have product regions created in the software.

To select your product region:

1. On the main menu, click **Administrative Settings**.
2. On the administration menu, click **Product Region Setup**.
3. Select the product region you prefer to use in the software and click **Save**.