BiFlow

Sales Methods & Invoicing Guide

A complete reference with real, worked examples for every sales method — and, in brackets, the matching voice command for every step.

1. Choosing a Sales Method

BiFlow supports three different ways of billing a client. They're not interchangeable — each one exists for a genuinely different kind of situation. This table lays out exactly how they differ.

	Package	Direct-Booking	Case
What it's for	A bundle of sessions bought upfront	One single visit, billed on the spot	An open-ended situation (a treatment, a matter)
How billing gets triggered	Reserving the package creates one invoice; sessions get used up from it	Booking the appointment itself creates the invoice, automatically, every time	Nothing automatic — you add an invoice manually, whenever you decide
Appointments ↔ Invoices	Many appointments, but only the original package invoice	Exactly 1 appointment = exactly 1 invoice, always	No fixed relationship — could be many visits and few invoices, or the reverse
Payments	Usually one or a few, against the whole package	Usually one per visit	Any number of partial payments, anytime, against the running balance
Credit Notes	Yes — via Discount / Return, linked to the package	Yes — via Discount / Return, linked to the visit	Yes — a dedicated Add Credit Note option
Best for	Repeatable, bulk-bought sessions (10 PT sessions)	Simple, one-and-done visits (a single class, a drop-in)	Multi-stage or unpredictable work (a treatment over several visits, a legal matter)

The real difference between Direct-Booking and Case, in one sentence:

Direct-Booking fuses booking and billing together — the moment you book the appointment, the invoice exists, automatically, every time. Case completely separates them — booking a visit (optional, just for notes) and creating an invoice (manual, whenever you decide) are two independent actions that don't have to match up at all.

A simple rule of thumb: if one visit should always produce exactly one bill for the same thing, use Direct-Booking. If the billing doesn't line up neatly with visits — multiple charges, irregular payments, refunds, a situation that unfolds over time — use a Case.

2. Choosing a Document Type

Every sales method produces the same three kinds of paperwork. Each one exists in two forms: a regular version (included in every plan, no extra cost) and an official, tax-compliant version (a paid add-on for businesses that need VAT-compliant documents for their accountant).

	Invoice	Receipt	Credit Note
What it represents	Money owed by the client	Money received from the client	Reduces what's owed — a refund, discount, or cancelled work
Created when	Reserving a package, booking direct, or adding to a case	Recording any payment	Manually, whenever a reduction is needed
Regular version	Free — included in every plan	Free — included in every plan	Free — included in every plan
Official version	$5/month add-on. VAT-compliant tax document	$5/month add-on. VAT-compliant tax document	$5/month add-on. VAT-compliant tax document
Serial numbers	INV-... / official: TINV-...	REC-... / official: TREC-...	CN-... / official: TCN-...

Regular invoicing is never gated behind a paid add-on — only the official, tax-compliant versions are. You can invoice, receipt, and issue credit notes freely on any plan; the add-on is only for businesses that specifically need official tax documents.

3. Three Complete Examples

Below is one full, real, worked example for each sales method — from adding the client through to the final official document. Each step shows exactly what to tap in the app, and in brackets, the equivalent thing to say if you're using the AI Voice Assistant instead.

3.1 Package Example — Jordan Blake, a 10-session PT package

Step 1: Add a new client called "Jordan Blake."

[Voice: "Add a new client called Jordan Blake, phone 71 234 567"]

Step 2: Go to Book → Reserve Sessions. Pick Jordan Blake, choose the PT 1 service type, enter 10 sessions at $35 each, and tap Reserve.

→ Invoice INV-2026-00xx created automatically for $350.

[Voice: "Reserve 10 sessions of PT 1 for Jordan Blake"]

Step 3: Go to Book → Book Appointment. Pick Jordan Blake, the date and time, and the PT 1 package to book against.

→ One session used from the package. 9 remaining.

[Voice: "Book Jordan Blake for PT 1 tomorrow at 10am"]

Step 4: Go to Pay. Record a payment of $150.

→ Receipt REC-2026-00xx created automatically.

[Voice: "Record a payment of $150 for Jordan Blake"]

Step 5: Repeat Step 3 to book the remaining sessions over the following weeks, exactly the same way.

[Voice: "Book Jordan Blake for PT 1 next Monday at 10am"]

Step 6: Once all sessions are used, record the remaining $200 payment.

[Voice: "Record a payment of $200 for Jordan Blake"]

Step 7: Jordan is a long-time client, so you'd like to give a $20 loyalty discount. Go to Book → Reserve Sessions → choose "💸 Discount / Return (custom)", enter -$20, and link it to Jordan's PT 1 package.

→ A Credit Note (CN-2026-00xx) is created, reducing what Jordan owes by $20.

[Voice: not yet supported — adding a Package or Direct-Booking discount by voice]

Step 8: Tap Make Official on the invoice, then on the receipt, to issue official tax documents for your accountant.

→ TINV-2026-00xx and TREC-2026-00xx created.

[Voice: not yet supported — making an existing document official by voice]

3.2 Direct-Booking Example — Morgan Reyes, a Drop-in Class

Step 1: Add a new client called "Morgan Reyes."

[Voice: "Add a new client called Morgan Reyes, phone 71 345 678"]

Step 2: Go to Book → Book Appointment. Pick Morgan Reyes, the date and time, and the Drop-in Class type — no package needed.

→ Invoice INV-2026-00xx for $25 created automatically, the moment the appointment is booked.

[Voice: "Book Morgan Reyes for a Drop-in Class tomorrow at 2pm"]

Step 3: Go to Pay. Record the $25 payment.

→ Receipt REC-2026-00xx created automatically.

[Voice: "Record a payment of $25 for Morgan Reyes"]

Step 4: If needed, add a Discount / Return the same way as Step 7 in the Package example, linking it to this visit instead of a package.

[Voice: not yet supported — adding a Package or Direct-Booking discount by voice]

Step 5: Tap Make Official on the invoice and the receipt.

→ TINV-2026-00xx and TREC-2026-00xx created.

[Voice: not yet supported — making an existing document official by voice]

3.3 Case Example — Riley Chen, a Knee Rehabilitation treatment plan

Step 1: Add a new client called "Riley Chen."

[Voice: "Add a new client called Riley Chen, phone 71 456 789"]

Step 2: Go to Clients → Riley Chen → Cases. Type "Knee Rehabilitation" and tap Open a Case.

[Voice: "Open a case for Riley Chen called Knee Rehabilitation"]

The assistant will ask: “Are you sure you want to open a new case for Riley Chen called ‘Knee Rehabilitation’?” — say or tap yes to confirm.

Step 3: Inside the case, under Add Invoice: description "Initial Assessment", amount $80, tap Add Invoice.

[Voice: "Add an $80 invoice to Riley Chen's case for Initial Assessment"]

The assistant will then ask: “Would you like to register this invoice as an official document?”

Step 4: Under Add Payment: $50, tap Record Payment.

→ Balance now $30.

[Voice: "Record a payment of $50 for Riley Chen"]

Step 5: Two weeks later, add a second invoice: "6-Week Treatment Plan", $400.

→ Balance now $430.

[Voice: "Add a $400 invoice to Riley Chen's case for 6-Week Treatment Plan"]

Step 6: Riley’s insurance covers part of the cost. Under Add Credit Note: "Insurance covered portion", $100, tap Add Credit Note.

→ Balance now $330 (the credit note reduces what's owed, it doesn't add to it).

[Voice: "Add a $100 credit note to Riley Chen's case for insurance covered portion"]

Step 7: Record further payments as Riley pays over the following weeks — any amount, any time.

[Voice: "Record a payment of $100 for Riley Chen"]

If Riley also happened to have a regular package with a balance at the same time, the assistant won't guess which one a payment is for — it will ask you to specify.

Step 8: Book Riley's actual visits against the case, so they show up as real appointments.

[Voice: "Book Riley Chen for the knee rehabilitation case next Tuesday at 9am"]

Step 9: After the visit, go to Progress and write up what was done.

[Voice: "Log a progress note for Riley Chen: range of motion improved, continue exercises twice a week"]

Step 10: Tap Make Official on the Treatment Plan invoice and the Credit Note, whenever you're ready.

→ TINV-2026-00xx and TCN-2026-00xx created.

When these two were added by voice in Steps 5 and 6, the assistant would have already asked about official registration right then — this step is only needed if you said no at the time, or added them by tapping in the app instead.

4. Voice Command Quick Reference

You don't need to say anything word-for-word — the assistant understands natural phrasing. Here are a few real examples for every kind of command, to give you a feel for how to talk to it.

Reserve a package

“Reserve 10 sessions of PT 1 for Jordan Blake”

“Sign Sara up for 5 physio sessions at $40 each”

Book an appointment

“Book Jordan Blake for PT 1 tomorrow at 10am”

“Schedule Morgan for a Drop-in Class this Friday at 2pm”

Cancel an appointment

“Cancel Jordan's appointment tomorrow”

“Cancel Sara's session on Friday at 2pm”

Reschedule an appointment

“Move Jordan's Wednesday session to Thursday at 11am”

“Reschedule Riley's Tuesday appointment to next Monday, same time”

Record a payment (creates a receipt automatically)

“Record a payment of $150 for Jordan Blake”

“Sara just paid $25 in cash”

Add a new client

“Add a new client called Morgan Reyes, phone 71 345 678”

“New client, Taylor Kim, from Instagram”

Update a client's details

“Update Jordan's phone number to 71 999 888”

“Change Sara's site to Downtown Studio”

Log a progress note

“Log a progress note for Jordan: squat improved to 30kg”

“Add a note for Riley: range of motion improved, continue exercises”

Case actions

“Open a case for Riley Chen called Knee Rehabilitation”

“Add a $500 invoice to Riley's case for the root canal”

“Add a $30 credit note to Riley's case for a loyalty discount”

“Book Riley for the knee rehab case next Tuesday at 9am”

Navigate around the app

“Go to the Pay screen”

“Open client statistics”

Ask a question

“How many sessions does Jordan have left?”

“What's Sara's balance?”

A note on the Voice Assistant

Two things in this guide are marked as not yet supported by voice, and it's worth being upfront about exactly what they are:

- Adding a Discount / Return credit note to a Package or Direct-Booking sale — currently only possible by tapping through Book → Reserve Sessions. Voice can add a Credit Note to a Case, just not to a Package or Direct-Booking sale yet.
- Making an already-existing document official after the fact — voice can only offer this as a follow-up question immediately after it creates a new Case invoice, Credit Note, or receipt. There's no standalone "make this official" voice command for something created earlier or through the app itself.

Both are straightforward to add if wanted — just ask.