



BiFlow Training Series

PART 2

Getting Started

Activation · Clinic Profile · Service Types · Invoice Settings

What we'll cover in this part

1

Activating the app

How a brand-new customer unlocks BiFlow on their device

2

The Home screen

A quick tour of what greets you every time you open the app

3

Clinic Profile

Setting your business name and branding

4

Service Types & Prices

Defining what you sell and how much it costs

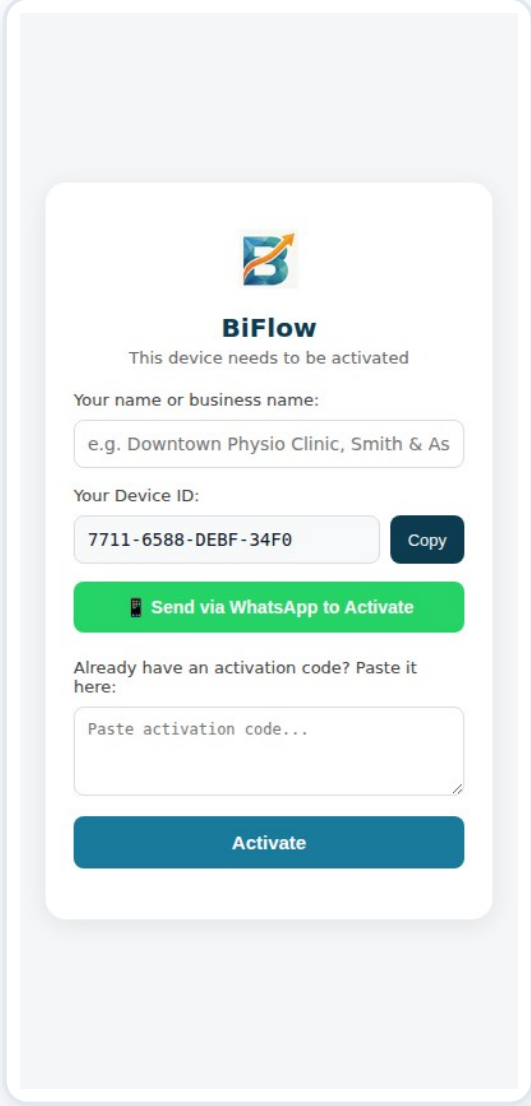
5

Invoice Settings

Setting up how your invoices and receipts look, including your stamp

1 Activating the App

- ✓ A brand-new customer opens the link — this screen appears automatically
- ✓ Their unique Device ID is already shown — no typing required
- ✓ One tap on “Send via WhatsApp to Activate” sends it straight to you
- ✓ Once you send back their activation code, they paste it in the box at the bottom and tap Activate



The screenshot shows a mobile app interface for BiFlow. At the top is the BiFlow logo, a stylized 'B' with an orange arrow. Below the logo, the text reads "This device needs to be activated". There are three input fields: "Your name or business name:" with a placeholder "e.g. Downtown Physio Clinic, Smith & As"; "Your Device ID:" with a placeholder "7711-6588-DEBF-34F0" and a "Copy" button; and "Already have an activation code? Paste it here:" with a placeholder "Paste activation code...". A green button with a WhatsApp icon and the text "Send via WhatsApp to Activate" is positioned below the Device ID field. At the bottom is a blue button labeled "Activate".

2 The Home Screen

Backup reminder

Now part of the Today card at the top — a gentle nudge if you haven't backed up recently, never forced, one tap to dismiss for the day

AI Assistant

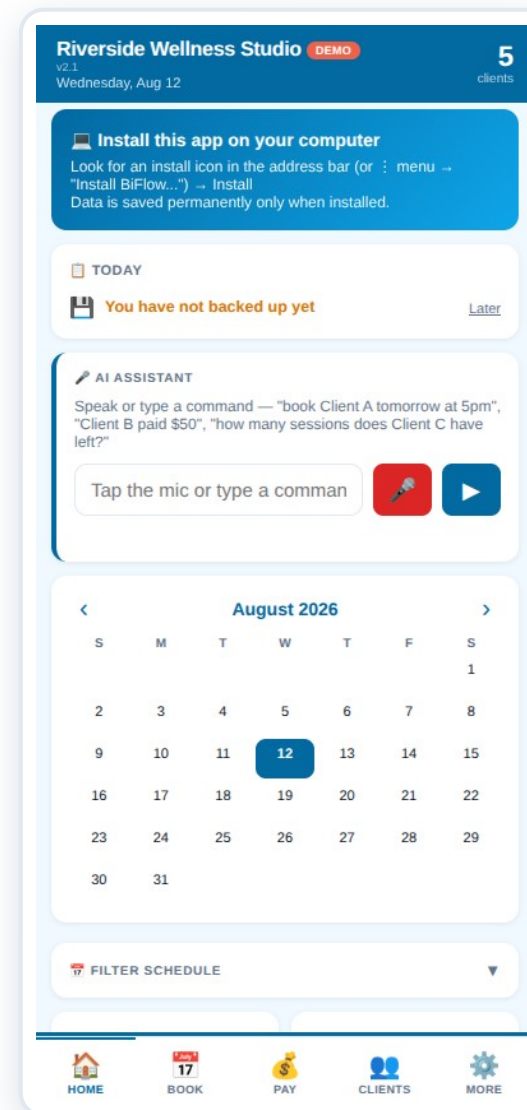
Speak or type a command right from Home — we'll cover this in a later part

Monthly Agenda

See the whole month at a glance, with a small number on any day that has bookings

Bottom navigation

Home, Book, Pay, Clients, More — every major area is one tap away



3 The More Tab — Your Control Center

Every setting, every configuration option, and every report in BiFlow lives in one place — the More tab.

 My Subscription

 AI Voice Assistant

 Clinic Profile

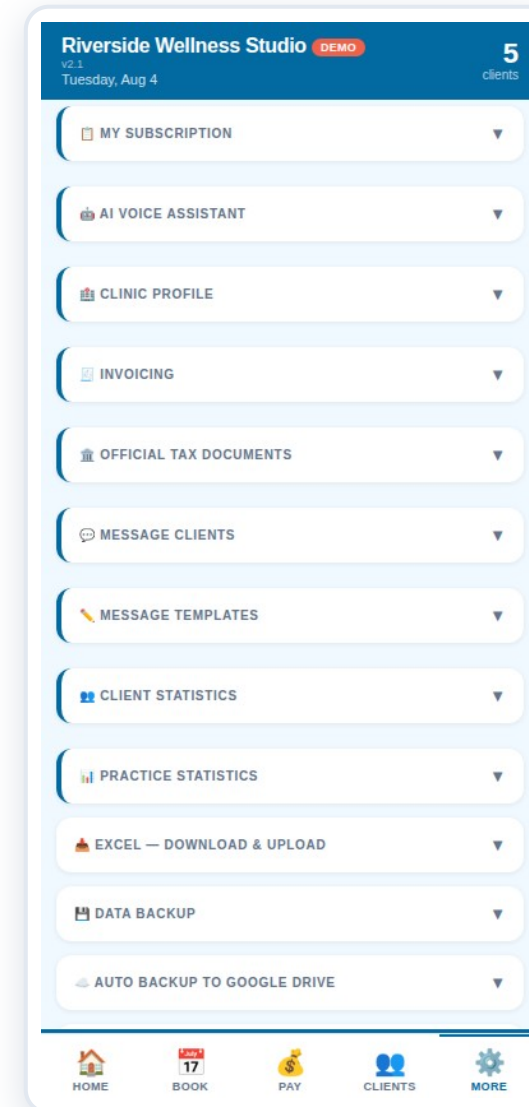
 Invoicing & Service Types

 Message Clients

 Practice & Client Statistics

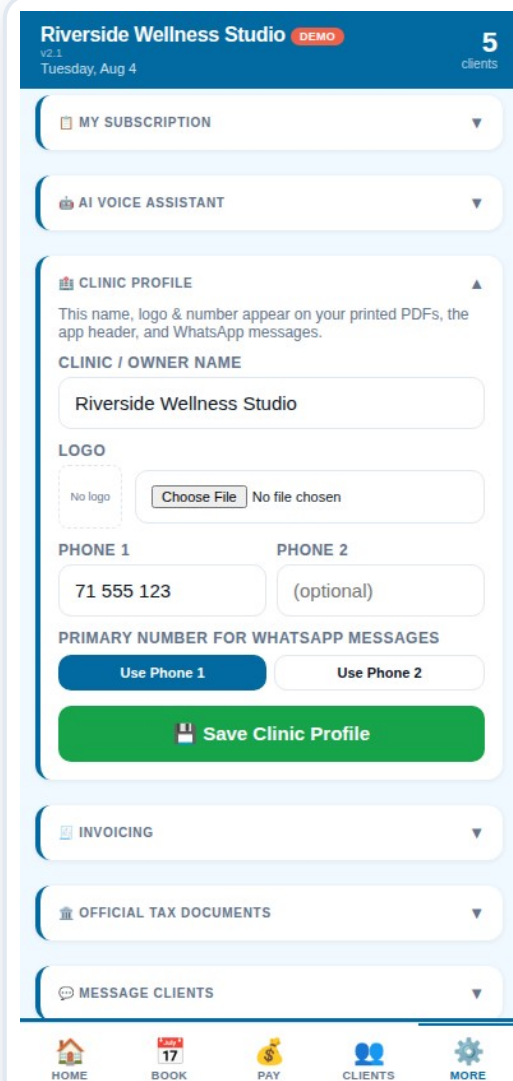
 Backup — local & Google Drive

 Everything else — one scroll away



4 Setting Up Your Clinic Profile

- 1 In More, tap “ Clinic Profile” to expand it
- 2 Type your business name — this appears at the top of every screen
- 3 Add a logo if you have one (optional)
- 4 Add up to two phone numbers, and choose which one is primary



The screenshot shows the 'Riverside Wellness Studio' app interface. At the top, a blue header bar displays the studio name, version 'v2.1', the date 'Tuesday, Aug 4', and a '5 clients' count. Below the header, a list of menu items is shown: 'MY SUBSCRIPTION', 'AI VOICE ASSISTANT', 'CLINIC PROFILE' (which is expanded), 'INVOICING', 'OFFICIAL TAX DOCUMENTS', and 'MESSAGE CLIENTS'. The 'CLINIC PROFILE' section contains a text input field with 'Riverside Wellness Studio', a 'LOGO' section with a 'Choose File' button, and two phone number input fields labeled 'PHONE 1' and 'PHONE 2'. Below these is a section for 'PRIMARY NUMBER FOR WHATSAPP MESSAGES' with two buttons: 'Use Phone 1' and 'Use Phone 2'. A green 'Save Clinic Profile' button is at the bottom of the section. The bottom navigation bar includes icons for 'HOME', 'BOOK' (with a date '17'), 'PAY', 'CLIENTS', and 'MORE'.

Riverside Wellness Studio DEMO 5 clients

v2.1
Tuesday, Aug 4

MY SUBSCRIPTION

AI VOICE ASSISTANT

CLINIC PROFILE ▲

This name, logo & number appear on your printed PDFs, the app header, and WhatsApp messages.

CLINIC / OWNER NAME

Riverside Wellness Studio

LOGO

No logo Choose File No file chosen

PHONE 1 PHONE 2

71 555 123 (optional)

PRIMARY NUMBER FOR WHATSAPP MESSAGES

Use Phone 1 Use Phone 2

Save Clinic Profile

INVOICING

OFFICIAL TAX DOCUMENTS

MESSAGE CLIENTS

HOME BOOK 17 PAY CLIENTS MORE

5

Defining Your Service Types & Prices

This is the single most important setup step — every booking, every invoice, and every price throughout BiFlow is built on what you define here.

1

Give each service a clear name — “PT 1”, “60-Min Massage”, “Legal Consultation”, anything that makes sense for your business

2

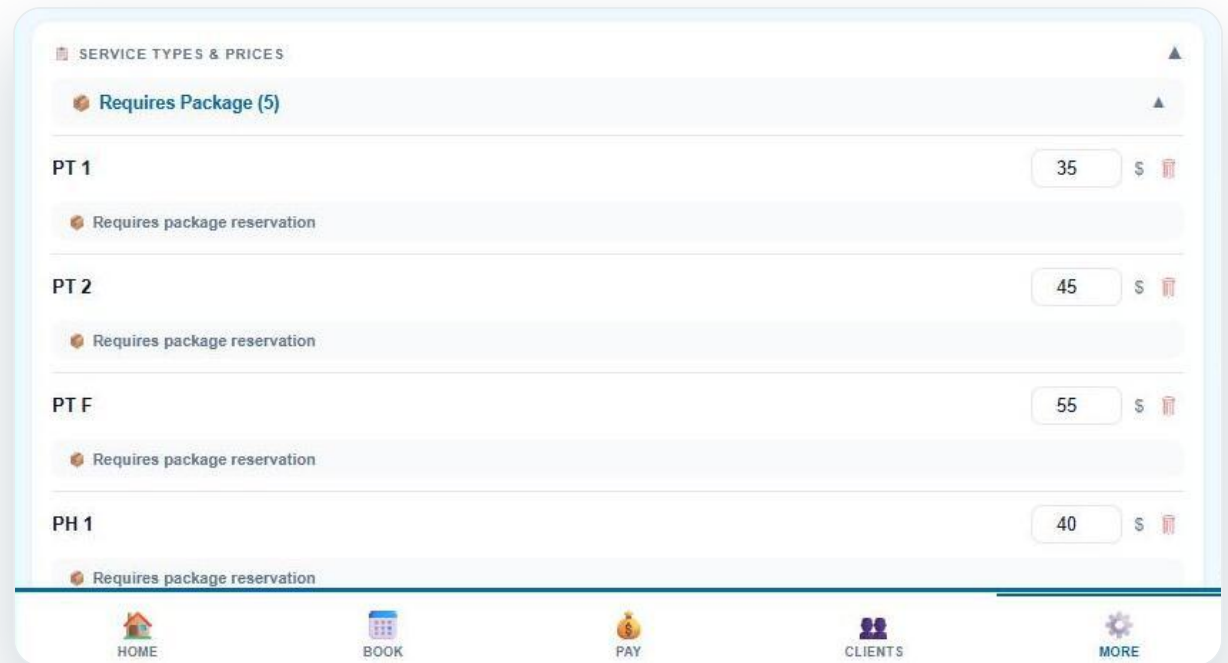
Set its price — this becomes the default any time it's booked

3

Decide: does this service need a package (multiple sessions bought upfront), or is it billed one visit at a time?

4

Add as many service types as you actually offer — there's no limit



6 Invoice Settings — Normal & Official

Two separate identities, one for each kind of document:

Normal Package Identity

Your everyday invoices, receipts, and credit notes — the ones included free on every plan.

Business Identity (Official)

Your VAT-compliant tax documents — only relevant if you're using the Official Tax Documents add-on.

Both sections also let you add a scanned stamp & signature — covered in detail in Part 4.

Riverside Wellness Studio DEMO
v2.1
Tuesday, Aug 4

5
clients

[← Back to More](#)

 NORMAL PACKAGE IDENTITY

Shown on plain (non-official) Invoices, Receipts & Credit Notes.

BUSINESS NAME

Riverside Wellness Studio

LOGO

Choose File

No file chosen

STAMP & SIGNATURE

 Add Stamp & Signature

 BUSINESS IDENTITY

Shown on official (tax) Invoices, Receipts & Credit Notes.

BUSINESS NAME

Riverside Wellness Studio S.A.L.

LOGO

Choose File

No file chosen

STAMP & SIGNATURE

 Add Stamp & Signature

PHONE

71 555 123

SYNDICATE #

 HOME

 BOOK

 PAY

 CLIENTS

 MORE

You're fully set up!

Your account is activated, your business identity is configured, and your services are priced and ready.

Coming up in Part 3

Clients & The Three Sales Methods — adding your first client, and booking them using Packages, Direct-Booking, or Cases