



BiFlow Training Series

PART 3

Clients & The Three Sales Methods

Adding Clients · Package · Direct-Booking · Case

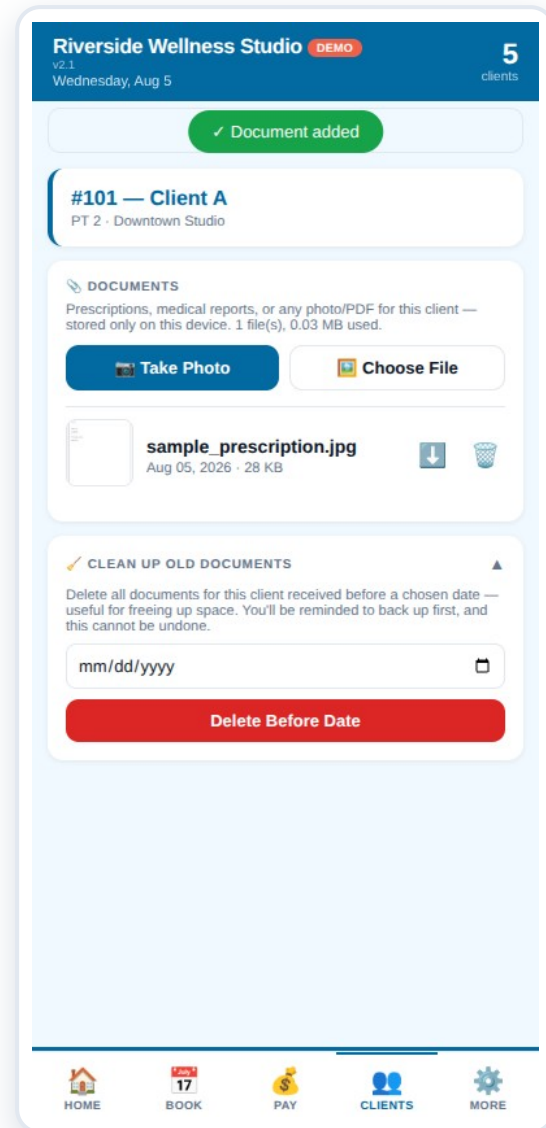
1 Adding Your First Client

- 1 Go to Clients, and tap "+ Add Client"
- 2 Fill in their name — the only field that's actually required
- 3 Add their phone number, site, service type, and how they found you, if you'd like
- 4 Tap Save — they're immediately ready to be booked

The screenshot shows the 'Riverside Wellness Studio' app interface. At the top, a blue header bar contains the studio name, a 'DEMO' badge, the version 'v2.1', the date 'Tuesday, Aug 4', and a '5 clients' indicator. Below the header is a white bar with a 'VIEW CUSTOMER STATEMENT' button. The main form area is titled 'ADD NEW CLIENT' and includes several input fields: 'FULL NAME *' (required), 'DATE OF BIRTH' (with a calendar icon), 'PHONE' (with a placeholder '03-XXXXXX'), 'SITE' and 'TYPE' (each with a dropdown arrow), and 'SOURCE' (with a dropdown arrow). A prominent green 'Add Client' button is at the bottom of the form. Below the form is a section titled 'ALL CLIENTS (5)' with a dropdown arrow. At the very bottom is a navigation bar with five icons: 'HOME' (house), 'BOOK' (calendar), 'PAY' (dollar sign), 'CLIENTS' (two people), and 'MORE' (gear).

2 Client Documents

- 1 Tap the Documents icon next to any client's name in the Clients tab
- 2 Tap Take Photo or Choose File, then name a folder for it — type a new one, or pick a suggestion
- 3 Every document shows a thumbnail, the date, and its size — tap to view, share straight to WhatsApp, or download it
- 4 Clean Up Old Documents deletes everything before a chosen date in one go, always with a backup reminder first



Three Ways to Bill — Choosing the Right One

Package

A client buys a bundle of sessions upfront. Every booking automatically uses one up.

EXAMPLE

10 PT sessions, bought once

Direct-Booking

One visit, billed on the spot. Booking and billing happen in the exact same step.

EXAMPLE

A single drop-in class

Case

Open-ended work. Add invoices and payments whenever the work actually happens.

EXAMPLE

A legal matter, a treatment plan

3 Package — Reserving Sessions

- 1 In Book, tap “Reserve Sessions — Create Invoice”
- 2 Choose the client and the service type
- 3 Enter how many sessions they're buying — the price fills in automatically
- 4 Tap Reserve — the invoice for the full package is created immediately

This is always the first step for a package client — reserve before booking their first session.

The screenshot shows the 'Riverside Wellness Studio' app interface. At the top, it says 'v2.1 Tuesday, Aug 4' and '5 clients'. The main screen is titled 'RESERVE SESSIONS — CREATE INVOICE'. Below the title, it says 'Client buys a package → generates invoice amount to be paid'. There are two dropdown menus: 'CLIENT *' with the option '— select client —' and 'SERVICE TYPE *' with the option '— select type —'. Below these are two input fields: 'SESSIONS *' with the value '10' and 'PRICE/SESSION (\$)' which is empty. A note below these fields states: 'Price/Session is editable — set a special price for this client without changing the service type's default price.' A green button labeled 'Invoice Amount' shows '\$0'. Below this is a 'DATE' field with '08/04/2026' and a calendar icon. A 'NOTE' field contains the text 'e.g. Package 1, first payment...'. At the bottom of the form is a green button labeled 'Reserve Package & Create Invoice'. Below the form is a section titled 'BOOK APPOINTMENT' with a dropdown arrow. At the very bottom is a navigation bar with icons for 'HOME', 'BOOK', 'PAY', 'CLIENTS', and 'MORE'.

4 Booking an Appointment

The same Book Appointment screen handles all three methods — the dropdown decides which one:

A reserved package

Uses up one session, no new invoice — it's already paid for

A direct-booking type

Creates a brand-new invoice for this one visit, right on the spot

An open Case

No price needed here — Case billing is handled separately, as we'll see next

Riverside Wellness Studio DEMO

v2.1
Tuesday, Aug 4

5
clients

RESERVE SESSIONS — CREATE INVOICE

BOOK APPOINTMENT

Pick a reserved package to use a session (no financial value), or a direct-booking type to bill this appointment on its own

CLIENT *

Client A

10
Reserved

10
Booked

0
Remaining

No remaining sessions! Reserve a new package first, pick a direct-booking type below, or book against an open case.

DATE *

08/04/2026

TIME *

7:00 AM ✓

RESERVED PACKAGE / SERVICE TYPE *

Drop-in Class — direct booking, no package

PRICE (\$) — EDITABLE, CREATES ITS OWN INVOICE

25

NOTE

Optional...

Book Appointment

HOME

BOOK

PAY

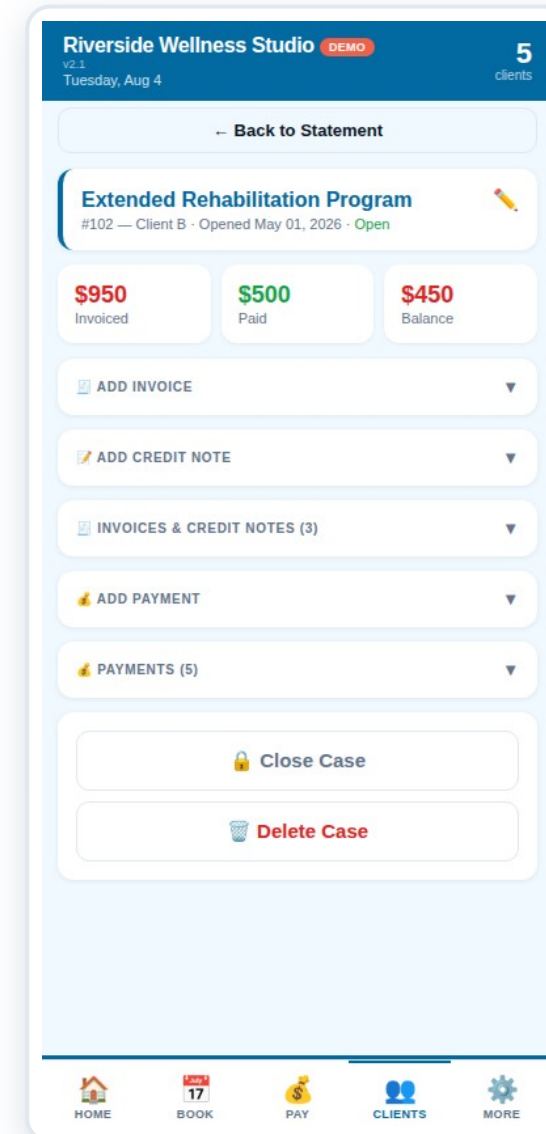
CLIENTS

MORE

5 Case — A Complete Walkthrough

Every Case has its own screen, with a running balance and everything specific to that piece of work:

- 1 Open a Case from a client's Statement — give it a name, like “Extended Rehabilitation Program”
- 2 The top shows Invoiced, Paid, and Balance — always up to date
- 3 Add Invoice, Add Credit Note, and Add Payment — each just a tap away
- 4 Close the Case once the work is finished, or leave it open indefinitely



6 Case — Adding an Invoice

- 1 Inside the Case, tap “Add Invoice” to expand it
- 2 Write a clear description of what's being billed
- 3 Enter the amount
- 4 Set the date — doesn't have to be today, if you're catching up on past work
- 5 Tap Add Invoice — the balance updates immediately

The screenshot displays the 'Riverside Wellness Studio' app interface. At the top, the header shows 'v2.1 Tuesday, Aug 4' and '5 clients'. Below the header, there are three summary cards: '\$950 Invoiced' (red text), '\$500 Paid' (green text), and '\$450 Balance' (red text). The main section contains a list of actions: 'ADD INVOICE' (expanded), 'ADD CREDIT NOTE', 'INVOICES & CREDIT NOTES (3)', 'ADD PAYMENT', and 'PAYMENTS (5)'. The 'ADD INVOICE' form includes fields for 'Description (e.g. Root Canal — Session 1)', 'Amount \$', and 'DATE' (set to 08/04/2026). A green 'Add Invoice' button is at the bottom of the form. Below the form are 'Close Case' and 'Delete Case' buttons. The bottom navigation bar has icons for HOME, BOOK, PAY, CLIENTS, and MORE.

7 Case — Discounts & Refunds

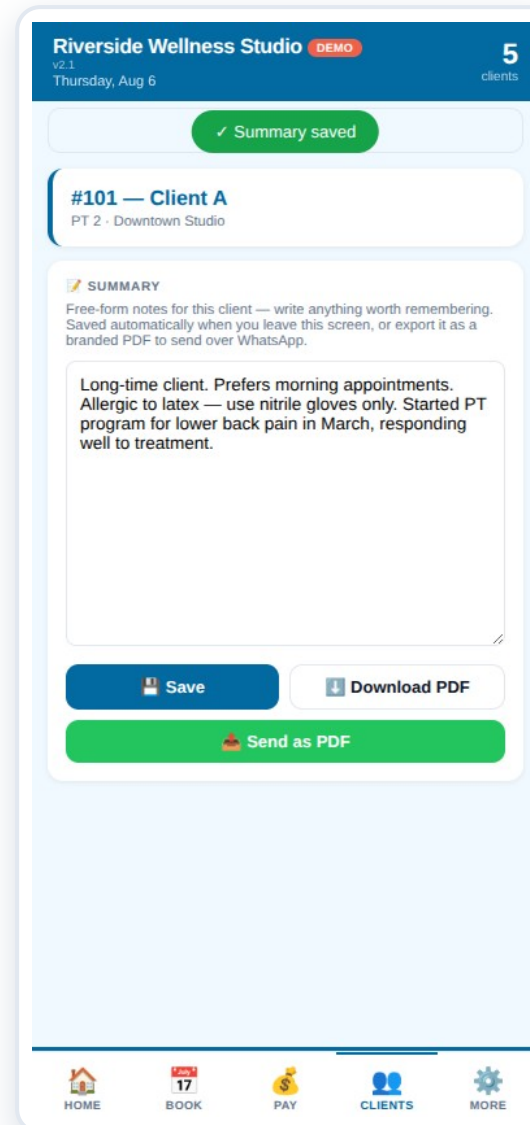
A Credit Note does the opposite of an invoice — it reduces what's owed, instead of adding to it.

- 1 Tap “Add Credit Note”
- 2 Describe the reason — a discount, a refund, work that didn't go ahead
- 3 Enter the amount as a positive number — BiFlow subtracts it automatically
- 4 The balance goes down, not up, the moment you add it

The screenshot shows the 'Riverside Wellness Studio' app interface. At the top, the header displays 'v2.1 Tuesday, Aug 4' and '5 clients'. Below the header, there are three summary cards: 'Invoiced' with a red '\$950', 'Paid' with a green '\$500', and 'Balance' with a red '\$450'. The main content area has a section titled 'ADD CREDIT NOTE' with a pencil icon and an upward arrow. Below this title is a descriptive text: 'Use this to reduce what's owed — for a refund, an overcharge, or work that didn't go ahead.' There are three input fields: 'Reason (e.g. Refund — treatment cancelled)', 'Amount \$', and 'DATE' (set to 08/04/2026). A large purple button with a plus icon and the text 'Add Credit Note' is positioned below the inputs. Underneath, there are three summary cards: 'ADD INVOICE', 'INVOICES & CREDIT NOTES (3)', and 'ADD PAYMENT'. Below these are two more summary cards: 'PAYMENTS (5)' and 'Close Case' (with a lock icon). At the bottom, there is a 'Delete Case' button (with a trash icon). The bottom navigation bar contains five icons: 'HOME', 'BOOK' (with a calendar icon showing '17'), 'PAY' (with a dollar sign icon), 'CLIENTS' (with a group of people icon), and 'MORE' (with a gear icon).

8 Client Summary

- 1 Tap the Summary icon next to any client's name in the Clients tab
- 2 Type freely in the box — there's no format to follow. It saves when you leave the screen, or tap Save any time
- 3 Download PDF saves a clean, branded copy with the clinic's name and logo at the top
- 4 Send as PDF opens the phone's share menu, so the same branded PDF can go straight to WhatsApp



You know all three sales methods!

You can now add clients and bill them however actually fits their situation — Package, Direct-Booking, or Case.

Coming up in Part 4

Payments & Invoicing — recording payments, official tax documents, editing invoices, your stamp & signature, and the Documents Registers