BiFlow Training Series

PART 3

Clients & The Three Sales Methods

Adding Clients · Package · Direct-Booking · Case

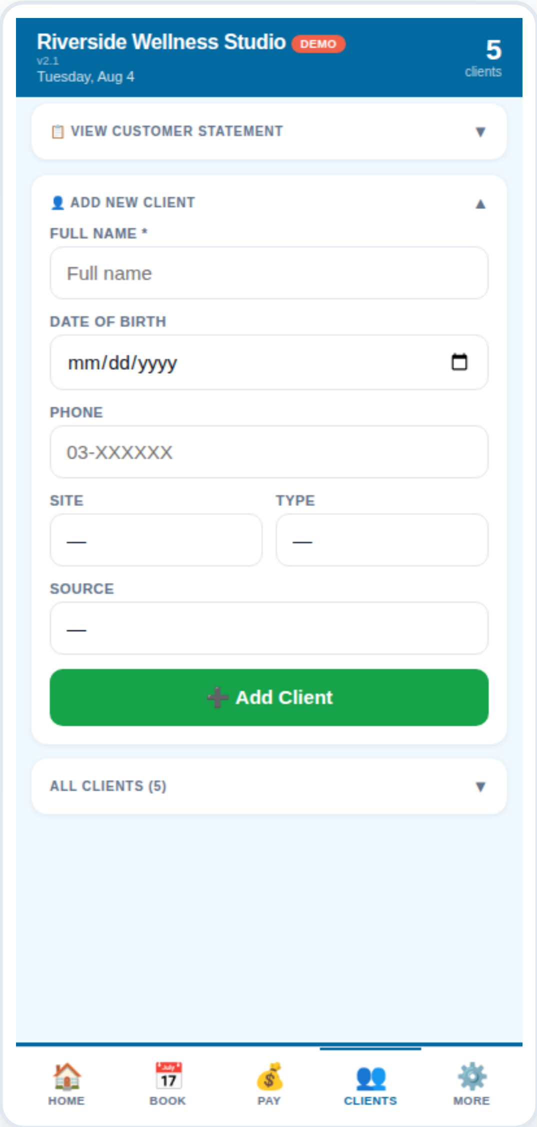
1 Adding Your First Client

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



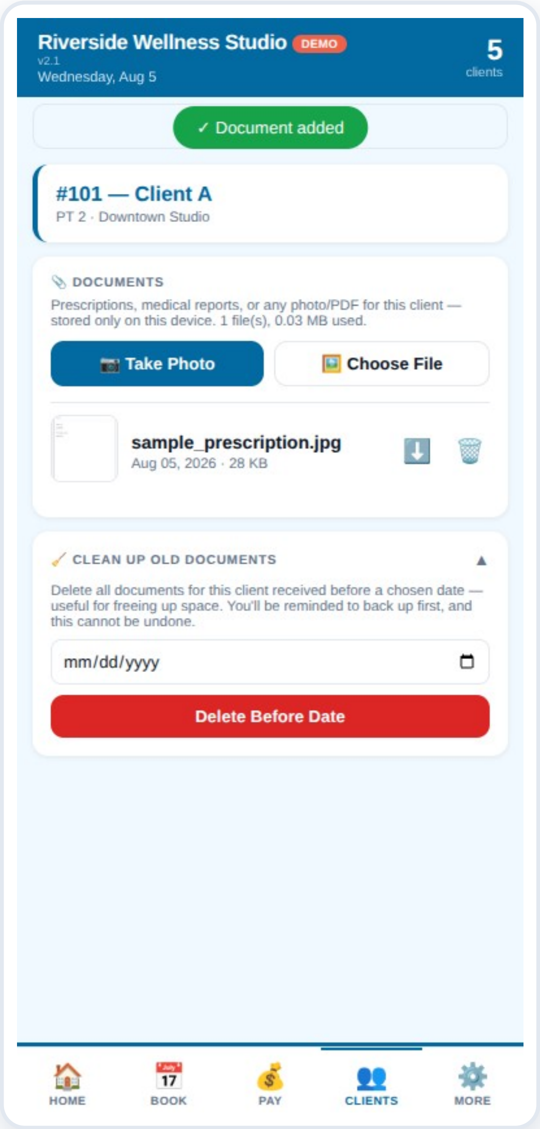
2 Client Documents

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

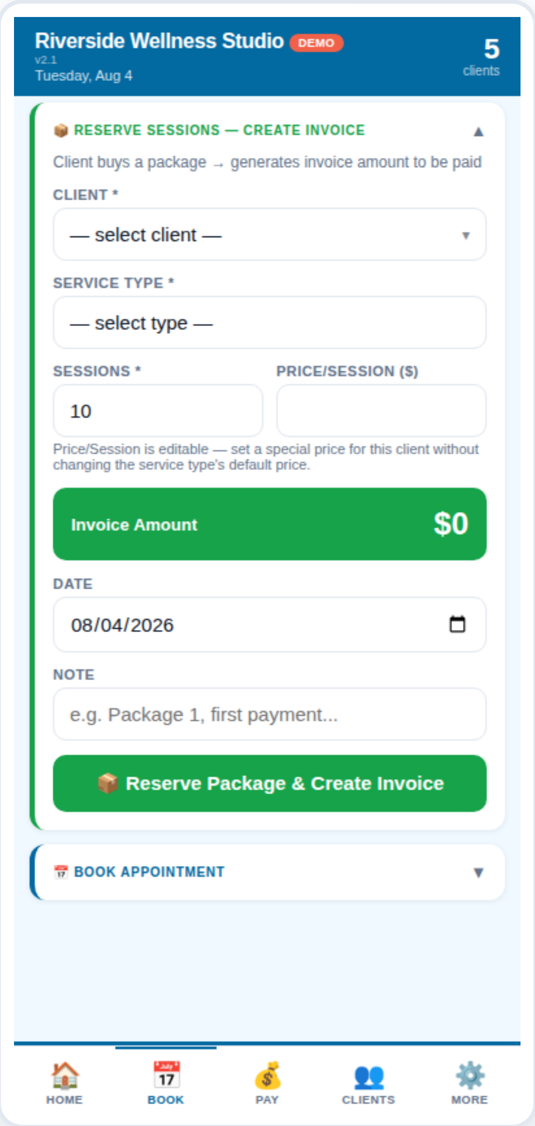
Open-ended work. Add invoices and payments whenever the work actually happens.

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.

4 Booking an Appointment

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

A reserved package

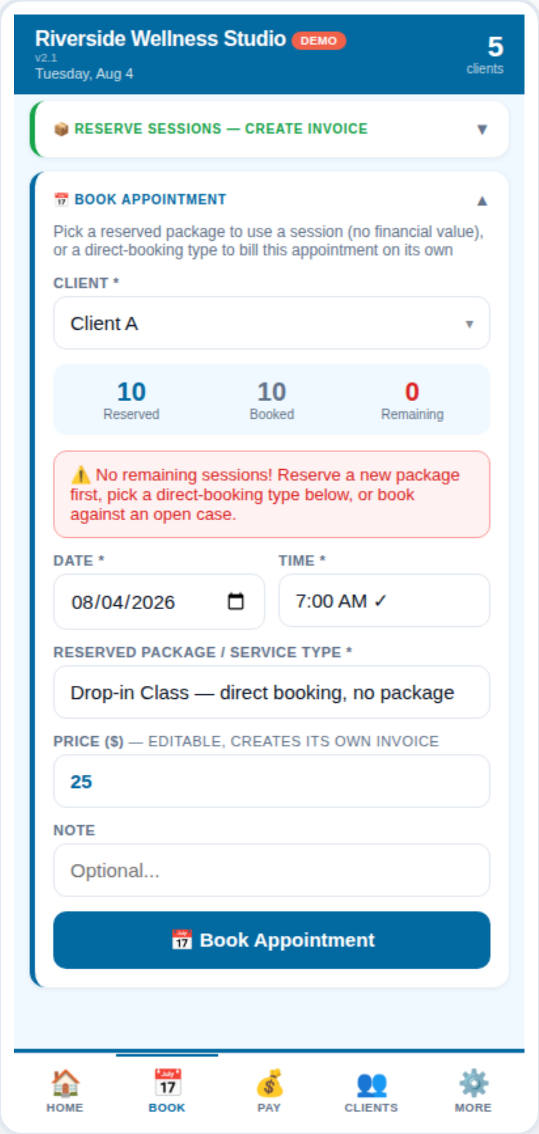
Uses up one session, no new invoice — it's already paid for

A direct-booking type

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

An open Case

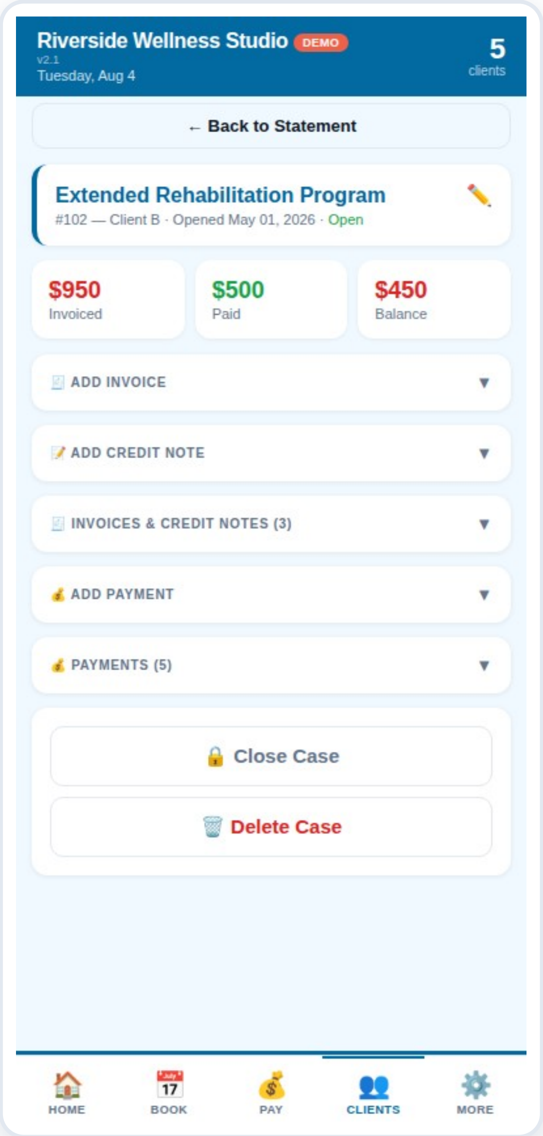
No price needed here — Case billing is handled separately, as we'll see next



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

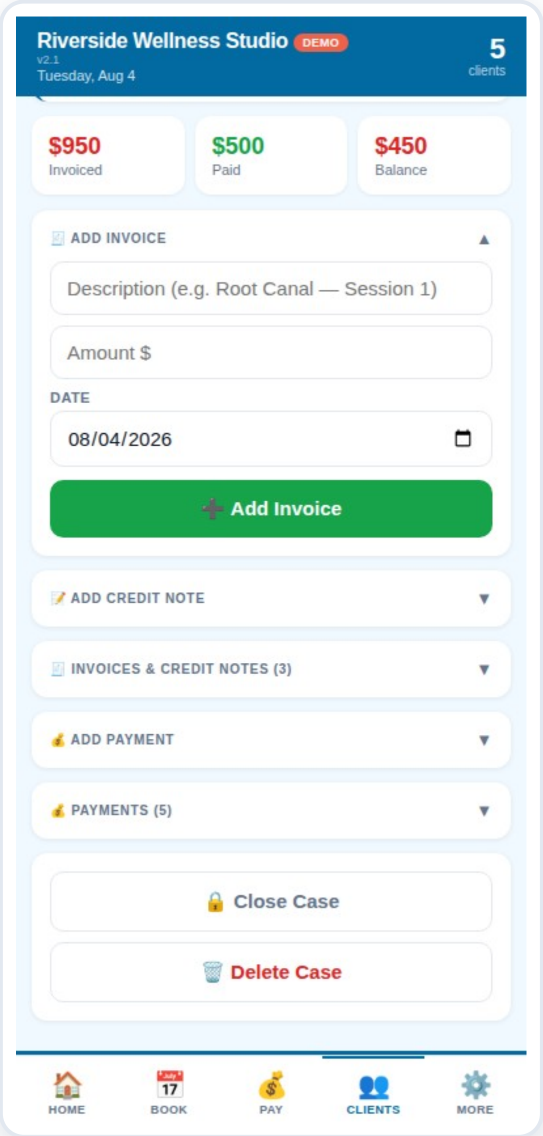
1. Inside the Case, tap “Add Invoice” to expand it

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

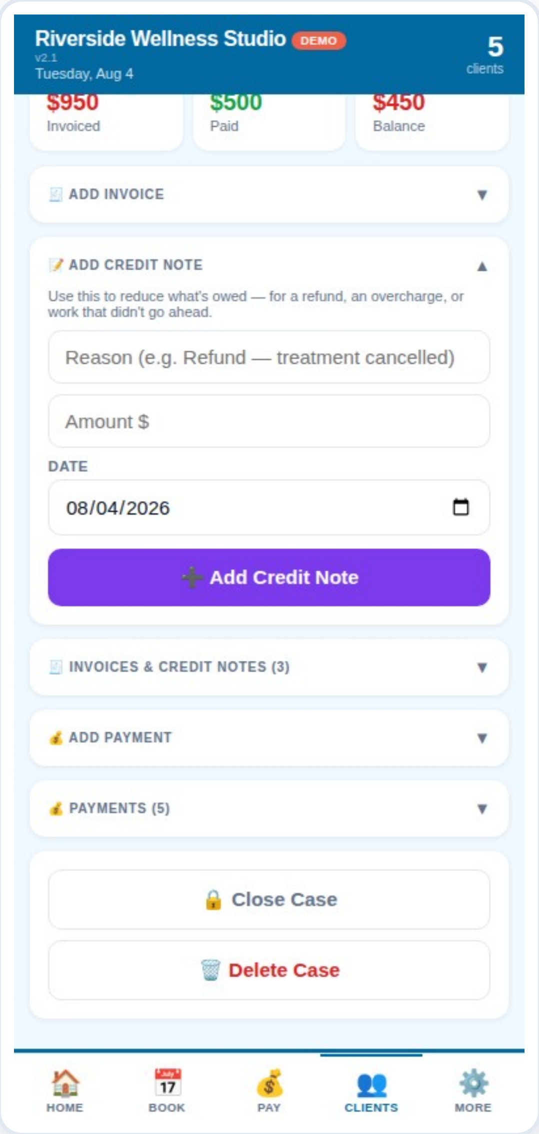
5. Tap Add Invoice — the balance updates immediately



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



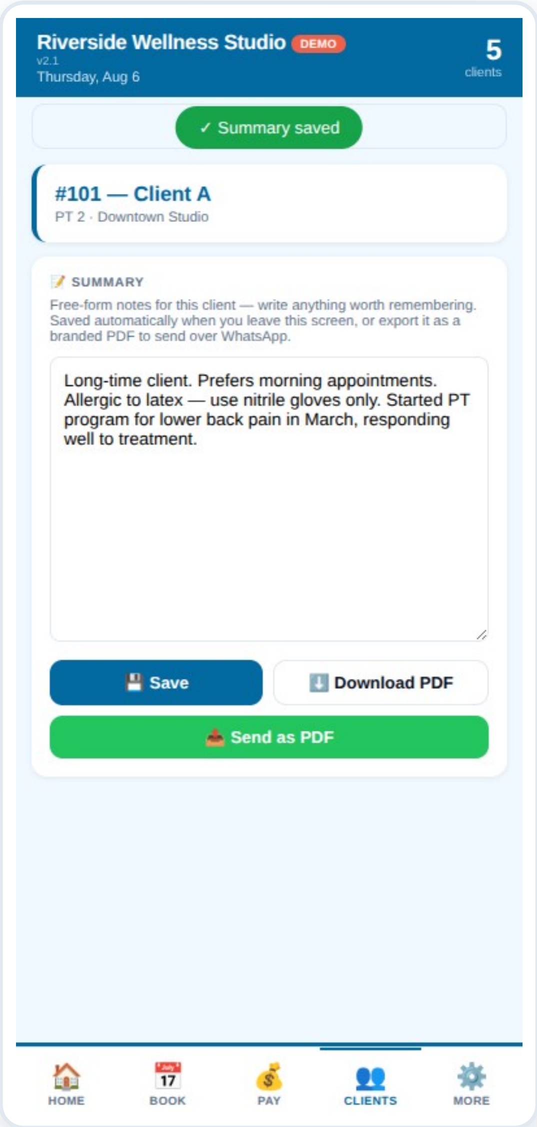
8 Client Summary

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