BiFlow Training Series

PART 5

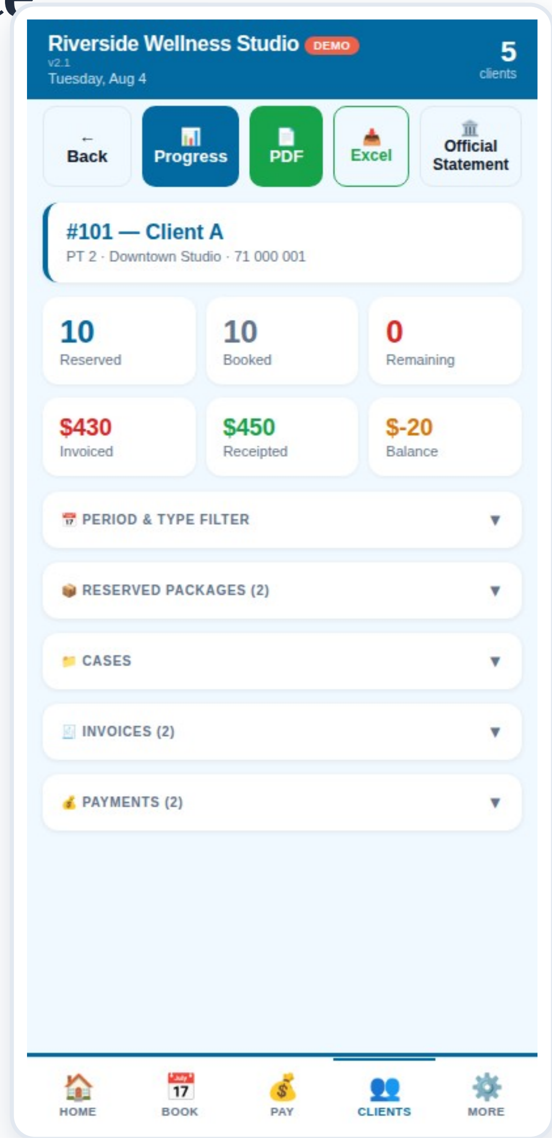
Client Statements & Progress Tracking

The Full Statement · Exercise Tracking · Automatic Charts

1 The Client Statement — Everything in One Place

Tap any client to open their Statement — every package, Case, invoice, and payment they've ever had, in one screen.

- Quick action buttons — Print PDF, Excel, Official Statement
- Sessions & balance summary at a glance
- Filter by date range or document type
- Reserved Packages, Cases, Invoices, and Payments — each its own collapsible section



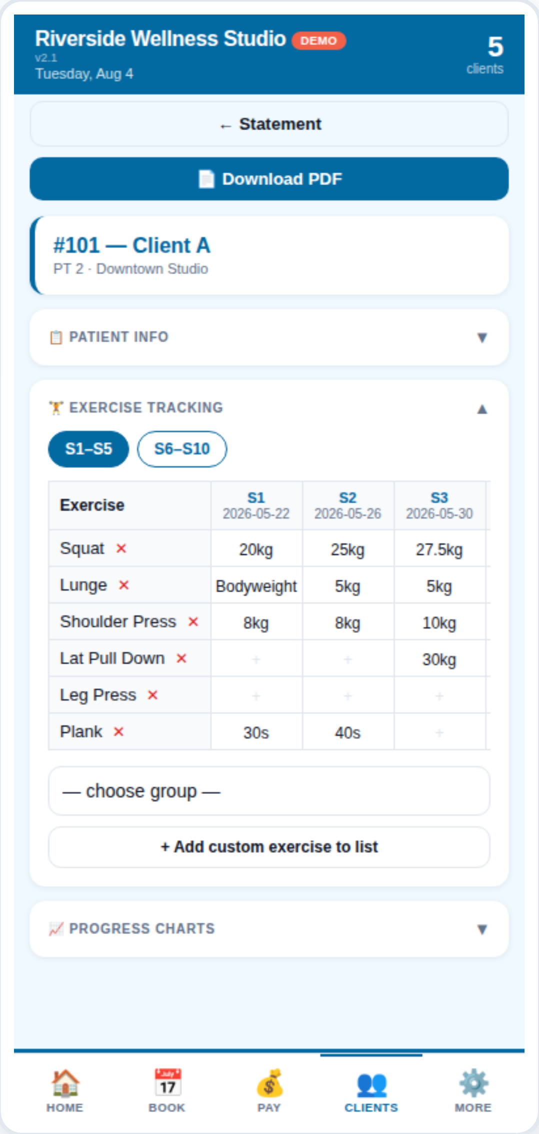
2 Logging Progress, Session by Session

1. From a client's Statement, tap Progress

2. Each session gets its own column — log a value for any exercise, any visit

3. Numbers (kg, seconds, reps) automatically become chart-ready — free text just stays a note

4. Add your own custom exercises any time — you're not limited to a preset list



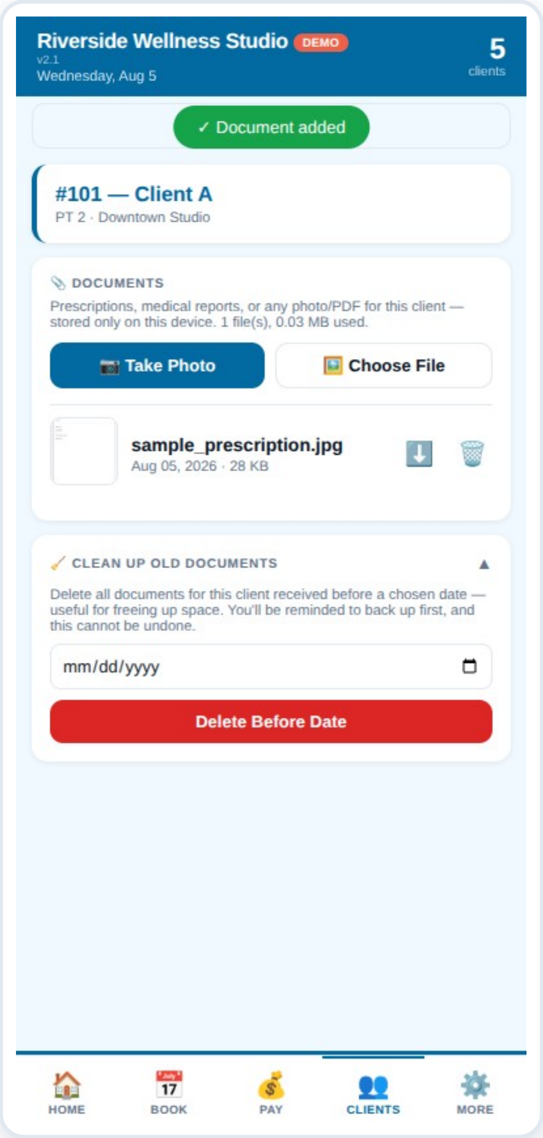
3 Client Documents

1. Tap the Documents icon next to any client's name in the Clients tab

2. 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

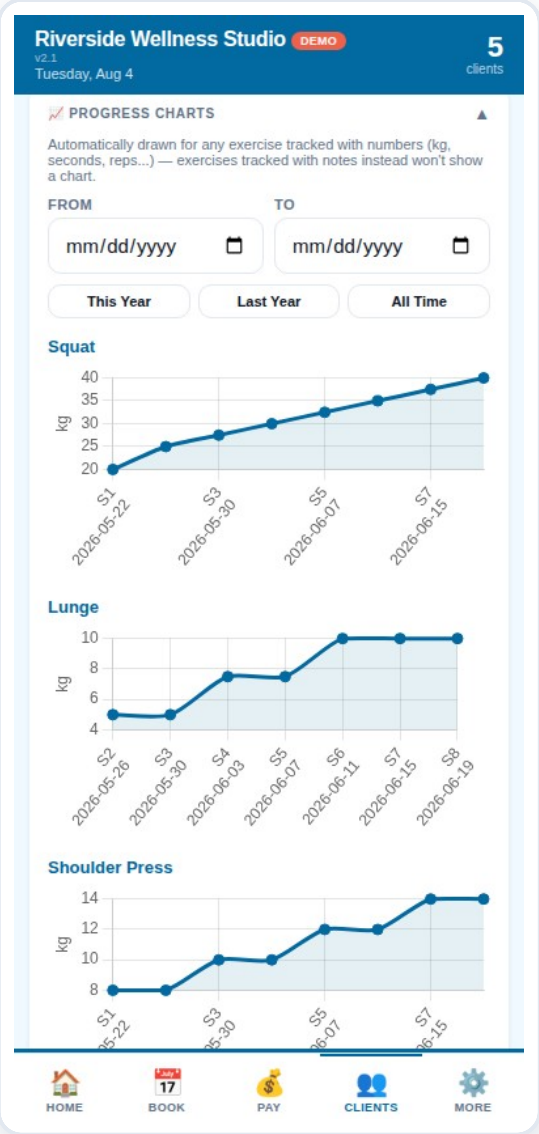
4. Clean Up Old Documents removes everything before a chosen date, always with a backup reminder first



4 Charts That Build Themselves

This is what a client sees when their improvement is tracked over time — completely automatic, no extra work.

1. Scroll down to Progress Charts, right below the exercise table
2. Every numerically-tracked exercise gets its own chart, automatically
3. Filter by This Year, Last Year, or All Time to see the full journey
4. A clean, visual way to show a client exactly how far they've come



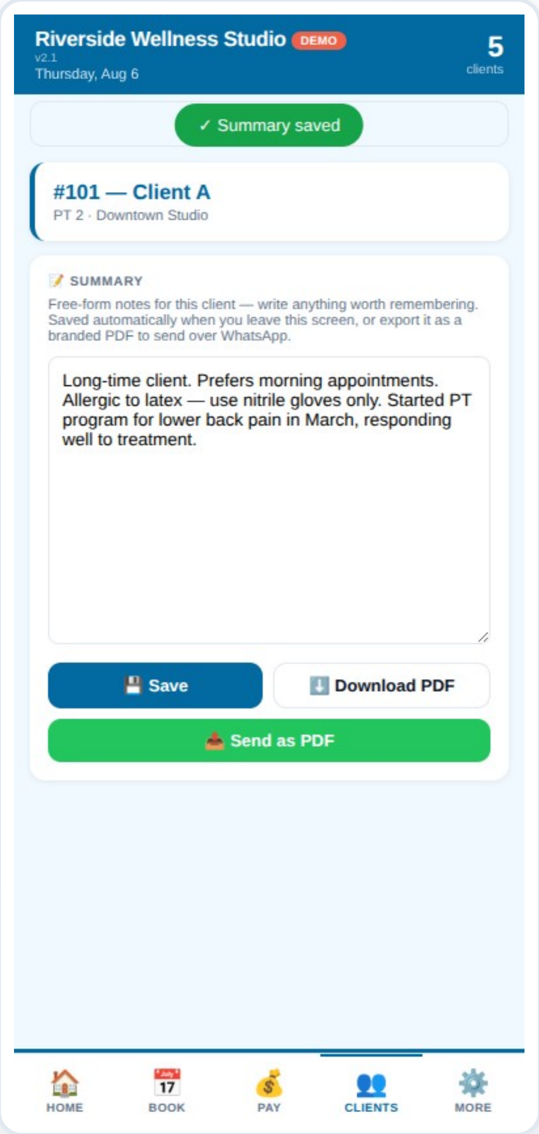
5 Client Summary

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



Every client's story, fully tracked

From their very first booking to their most recent chart, it's all there whenever you need it.

Coming up in Part 6

Statistics, WhatsApp Messaging & the AI Voice Assistant — seeing the big picture, and running the app hands-free