Hands-On Training Workbook

41 guided exercises · Start from empty data · Learn every feature by doing it

Contents

Work through these modules in order, starting from a Blank install with zero clients. Each exercise builds on the ones before it.

MODULE 1

Getting Started From Empty

For this whole workbook, use the Blank version of BiFlow with no data in it yet -- either a fresh install, or after using Settings > Reset Options > Start From Scratch. Every exercise builds on the one before it, so work through them in order the first time.

Exercise 1.1 — Activate your device (if needed)

If this copy of BiFlow requires a subscription, you'll see an activation screen the first time you open it.

- [ ] Open BiFlow for the first time
- [ ] If you see “This device needs to be activated,” note the Device ID shown on screen
- [ ] Send that Device ID via WhatsApp as instructed, and enter the activation code you receive

EXPECTED RESULT
The app loads normally into the Home tab, showing 0 clients.

Exercise 1.2 — Set up your Business Profile

Your business name and logo appear on the app header and every printed PDF -- worth setting up first.

- [ ] Tap More (bottom right)
- [ ] Tap Clinic Profile to expand it
- [ ] Type a business name, e.g. “Downtown Physio Clinic”
- [ ] Optionally choose a logo image
- [ ] Tap Save Clinic Profile

EXPECTED RESULT
Your business name now appears at the top of the app, replacing the default header text.

Exercise 1.3 — Set up Invoice Settings

This controls the business name, and (if applicable) VAT details, shown on your official tax documents later in this workbook.

- [ ] Still in More, expand Invoicing
- [ ] Tap Invoice Settings
- [ ] Fill in your official business name and phone number
- [ ] If you're VAT-registered, toggle it on and enter your VAT rate
- [ ] Save

EXPECTED RESULT
Invoice Settings saves without error and returns you to the More tab.

MODULE 2

Clients

Exercise 2.1 — Add your first client

- [ ] Tap Clients (bottom tab)
- [ ] Scroll to Add New Client
- [ ] Enter a name, e.g. “John Carter”, and a phone number
- [ ] Optionally pick a Site and Source
- [ ] Tap Add Client

EXPECTED RESULT
John Carter appears in the client list as client #1, and the Home tab's client count updates to 1.

Exercise 2.2 — Add a second client with different details

- [ ] Repeat the steps above for a second client, e.g. “Sara Nassar”
- [ ] This time, pick a different Source (e.g. “Referral” instead of “Instagram”)

EXPECTED RESULT
Both clients now appear in the list, each with their own client number.

Exercise 2.3 — Edit a client's details

- [ ] Tap the edit (pencil) icon next to John Carter
- [ ] Change his phone number or add a Date of Birth
- [ ] Save

EXPECTED RESULT
The updated details are reflected immediately in the client list.

MODULE 3

Service Types -- Package vs. Direct-Booking

This is one of the most important settings in BiFlow: every service you offer is either booked as a Package (sessions bought in bulk, used over time) or Direct-Booking (billed one visit at a time, no package involved).

Exercise 3.1 — Create a package-based service type

- [ ] In More, expand Service Types & Prices
- [ ] Type a name, e.g. “PT 1”, and a price, e.g. 30
- [ ] Leave the toggle button on “Requires package reservation”
- [ ] Tap Add Service Type

EXPECTED RESULT
PT 1 appears under the “Requires Package” group when you expand it.

Exercise 3.2 — Create a Direct-Booking service type

- [ ] Add another type, e.g. “Drop-in Class” at $25
- [ ] Before tapping Add, tap the toggle button once to switch it to “Books directly, no package”
- [ ] Tap Add Service Type

EXPECTED RESULT
Drop-in Class appears under the “Direct Booking” group instead.

Exercise 3.3 — Change a type's billing style later

- [ ] Find PT 1 in the list
- [ ] Tap its billing-style button once

EXPECTED RESULT
PT 1 moves from the Requires Package group to the Direct Booking group (or back), immediately.

MODULE 4

Booking -- Packages

Exercise 4.1 — Reserve a package for a client

- [ ] Tap Book (bottom tab)
- [ ] Under Reserve Sessions -- Create Invoice, pick John Carter
- [ ] Pick PT 1, enter 10 sessions
- [ ] Tap Reserve Package & Create Invoice

EXPECTED RESULT
A toast confirms the package was reserved and shows an invoice number (e.g. INV-2026-0001).

Exercise 4.2 — Book a session against that package

- [ ] Still on Book, under Book Appointment, pick John Carter and PT 1
- [ ] Pick today's date and a time
- [ ] Tap Book Appointment

EXPECTED RESULT
The appointment appears on today's Home schedule, and the package's remaining count drops from 10 to 9.

Exercise 4.3 — Check the client's statement

- [ ] Go to Clients > tap John Carter
- [ ] Review the Reserved, Booked, and Remaining counts at the top

EXPECTED RESULT
Reserved shows 10, Booked shows 1, Remaining shows 9 -- matching what you just did.

MODULE 5

Booking -- Direct

Exercise 5.1 — Book a Direct-Booking appointment

- [ ] Go to Book > Book Appointment
- [ ] Pick Sara Nassar and Drop-in Class
- [ ] Notice the price field appears, since this type has no package
- [ ] Pick a date and time, then tap Book Appointment

EXPECTED RESULT
The appointment is created and invoiced in one step -- no package was reserved first.

Exercise 5.2 — Confirm the invoice was created automatically

- [ ] Go to Clients > Sara Nassar
- [ ] Look at her Invoiced total

EXPECTED RESULT
Her Invoiced amount already includes the Drop-in Class charge, with no separate reservation step.

MODULE 6

Payments

Exercise 6.1 — Record a partial payment

- [ ] Go to Pay (bottom tab)
- [ ] Pick John Carter
- [ ] Enter a partial amount, e.g. $150 (out of $300 owed)
- [ ] Tap Record Payment

EXPECTED RESULT
John Carter now appears under Not Fully Paid, showing a $150 balance due.

Exercise 6.2 — Record the remaining balance

- [ ] Go back to Pay, pick John Carter again
- [ ] Enter the remaining $150

EXPECTED RESULT
John Carter no longer appears under Not Fully Paid -- his package is fully paid.

MODULE 7

Invoicing & Official Documents

If Invoicing isn't active on your plan, you'll see an upsell card here instead -- skip this module until it's enabled.

Exercise 7.1 — Find an automatically-created invoice

- [ ] Go to Clients > John Carter
- [ ] Under Reserved Packages, tap his PT 1 package to expand it

EXPECTED RESULT
You see the invoice number that was created automatically when you reserved the package back in Exercise 4.1.

Exercise 7.2 — Make an invoice Official

- [ ] In that expanded package, tap Make Official

EXPECTED RESULT
A new official tax invoice number appears (e.g. TINV-2026-0001), with VAT applied if you enabled it in Exercise 1.3.

Exercise 7.3 — View the Official Documents Register

- [ ] Go to More > Invoicing > Official Documents Register

EXPECTED RESULT
The official invoice from the previous exercise appears in the register, with running totals at the top.

MODULE 8

Progress Sheets & Charts

Exercise 8.1 — Log a session with a numeric value

- [ ] Go to Clients > John Carter > tap Progress
- [ ] Choose a group, then an exercise (or add a new one, e.g. “Leg Press”)
- [ ] Enter a number with a unit, e.g. “20kg”, for today's session

EXPECTED RESULT
The value appears in the exercise tracking table under today's session column.

Exercise 8.2 — Create exercise groups

- [ ] In More > Exercise List, tap Add Group and create “Legs”
- [ ] Find Leg Press in the list and use its dropdown to move it into Legs

EXPECTED RESULT
Leg Press now appears under the Legs section instead of Ungrouped.

Exercise 8.3 — Log a second session and view the chart

- [ ] Go back to John Carter's Progress Sheet
- [ ] Log a second session for Leg Press with a higher number, e.g. “25kg”
- [ ] Scroll down to Progress Charts

EXPECTED RESULT
A line chart for Leg Press appears automatically, showing the increase from 20kg to 25kg, with “kg” labeled on the left axis.

Exercise 8.4 — Filter the chart by date range

- [ ] In the Progress Charts card, tap This Year

EXPECTED RESULT
The chart redraws using only sessions within the current year (in this case, both sessions still show, since they're recent).

MODULE 9

Case / Matter Billing

Cases are a separate tool from Packages and Direct-Booking -- useful for open-ended work with multiple invoices and irregular partial payments, like a dental treatment or a legal matter.

Exercise 9.1 — Open a case for a client

- [ ] Go to Clients > Sara Nassar
- [ ] Scroll to Cases
- [ ] Type a name, e.g. “Knee Rehabilitation”, and tap Open a Case

EXPECTED RESULT
You're taken straight into the new case's own screen, showing $0 invoiced and $0 paid.

Exercise 9.2 — Add invoices to the case over time

- [ ] Under Add Invoice, enter a description like “Initial Assessment” and an amount, e.g. 100
- [ ] Tap Add Invoice
- [ ] Add a second invoice, e.g. “Weeks 1-4 Treatment” for 300

EXPECTED RESULT
Both invoices appear in the Invoices list, and the Invoiced total updates to $400.

Exercise 9.3 — Record partial payments against the case

- [ ] Under Add Payment, enter 100 and tap Record Payment
- [ ] Repeat once more with another 100

EXPECTED RESULT
Paid shows $200, and Balance shows $200 remaining -- the case stays open with an ongoing balance.

Exercise 9.4 — Close the case once treatment ends

- [ ] Once you're done testing, tap Close Case at the bottom

EXPECTED RESULT
The case is marked closed and labeled accordingly back on Sara's statement page.

MODULE 10

Statistics

Exercise 10.1 — View Practice Statistics

- [ ] Go to More > Practice Statistics
- [ ] Try the This Year / Last Year / All Time buttons
- [ ] Switch between Revenue, Sessions, and By Type chart views

EXPECTED RESULT
The chart and the four summary numbers (Reserved, Booked, Invoiced, Collected) update to match your test data.

Exercise 10.2 — View Client Statistics

- [ ] Go to More > Client Statistics

EXPECTED RESULT
You see your clients ranked by revenue, and any relevant Low on Sessions or Recently Completed alerts.

MODULE 11

WhatsApp Messaging

Exercise 11.1 — Send a low-session nudge

This appears automatically for any client running low on sessions -- you may need to book down a package first to see it.

- [ ] From Client Statistics' Low on Sessions list, tap a client's nudge button

EXPECTED RESULT
WhatsApp opens with a pre-written low-session message ready to send.

Exercise 11.2 — Send an appointment reminder

- [ ] Go to Home, find tomorrow's appointments
- [ ] Tap the reminder button next to one

EXPECTED RESULT
WhatsApp opens with a pre-written reminder for that specific appointment's date and time.

Exercise 11.3 — Customize a message template

- [ ] Go to More > Message Templates
- [ ] Edit the Low on Sessions message, adding your own wording
- [ ] Tap Save

EXPECTED RESULT
The next time you send a low-session nudge, your new wording is used instead of the default.

Exercise 11.4 — Send a broadcast message

- [ ] Go to More > Message Clients > Send a Message
- [ ] Write a short message and select one or more clients

EXPECTED RESULT
WhatsApp opens ready to send your message to the selected client(s).

MODULE 12
Backup

Exercise 12.1 — Export a plain backup

- [ ] Go to More > Data Backup > Export Backup

EXPECTED RESULT
A JSON file downloads containing all of your test data.

Exercise 12.2 — Set up WhatsApp backup

- [ ] In the same section, enter your own WhatsApp number and tap Save
- [ ] Tap Backup via WhatsApp

EXPECTED RESULT
Your phone's share screen opens with the backup file ready to send -- or, if that's not supported on your device, the file downloads and WhatsApp opens automatically to a chat with yourself.

MODULE 13

Excel Export & Import

Exercise 13.1 — Download and re-upload your data

- [ ] Go to More > Excel > Download Excel File
- [ ] Open it, change a client's phone number in the spreadsheet, and save
- [ ] Back in BiFlow, tap Upload Excel File and choose the file you edited

EXPECTED RESULT
The client's phone number updates in the app to match your spreadsheet edit.

MODULE 14

Wrapping Up

You've now touched every major part of BiFlow. Two last settings worth knowing about before you start with real client data.

Exercise 14.1 — Add a Site and a Source

- [ ] Go to More > Sites, add a location, e.g. “Downtown Studio”
- [ ] Go to More > Sources, add e.g. “Google Search”

EXPECTED RESULT
Both now appear as choices when adding or editing a client.

Exercise 14.2 — Know where Reset Options are (informational -- don't tap it now)

- [ ] Go to More > Reset Options and just read the two choices

EXPECTED RESULT
You understand there's a way to clear test data (sessions & payments only, or a full wipe) whenever you're ready to start using BiFlow for real -- but you don't need to do that now.