BiFlow

BUSINESS WORKFLOW CONTROL

Clients · Bookings · Invoicing · Payments · Progress Tracking · Statistics · WhatsApp Messaging

Contents

1 Welcome to BiFlow

BiFlow is a simple app for personal trainers, physiotherapists, and small clinics to keep track of everything that matters day to day: your clients, the session packages they've bought, which sessions have been used, who has paid and who still owes money, and each client's progress over time.

It works entirely on your own phone, tablet, or computer — there is no internet connection required to use it day to day, and your data is never sent to anyone else's server. Everything is stored securely on your own device.

The app is organized into five main sections, always available at the bottom of the screen:

- Home — a quick overview of today's schedule and this month's numbers
- Book — reserve session packages, book direct appointments, and schedule visits
- Pay — record payments and see who still owes money
- Clients — your full client list, statements, and progress sheets
- More — statistics, client insights, invoicing, your clinic profile, WhatsApp messaging, Excel export, and backups

This guide walks through every one of these sections in detail, with real examples, so you can use the app confidently without needing to ask anyone for help.

2 Activating the App

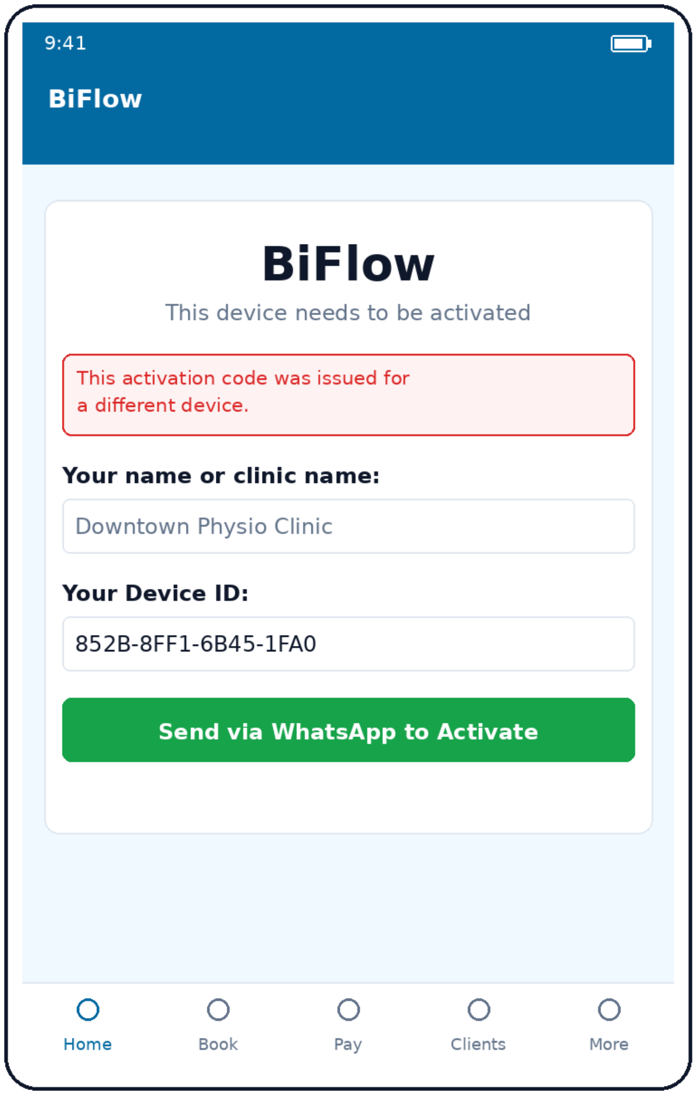
Some copies of BiFlow (for example, a new copy given to a new clinic) need to be activated before they can be used. If you see a screen like the one below when you open the app, this is what it means.

If you're trying a trial copy of BiFlow, no activation code is needed at all for the first month — the app unlocks immediately and everything, including Voice and Official Tax Documents, is available to try in full. Only once that free month ends does an activation code become necessary, if you decide to continue as a paying subscriber (see Chapter 21).

Every device (phone, tablet, or computer) has its own unique Device ID — a code that identifies that specific device. This is shown clearly on the activation screen.

- Type your name or clinic name into the box provided
- Tap “Send via WhatsApp to Activate” — this opens WhatsApp with a message already filled in, including your Device ID
- Send that message — you'll receive an activation code back
- Paste the activation code into the box on this same screen and tap Activate
- The app will unlock immediately and remember this activation — you will not need to repeat this on the same device

Tip: If you ever switch to a new phone or computer, that new device will need its own separate activation code, since each device has its own unique Device ID.

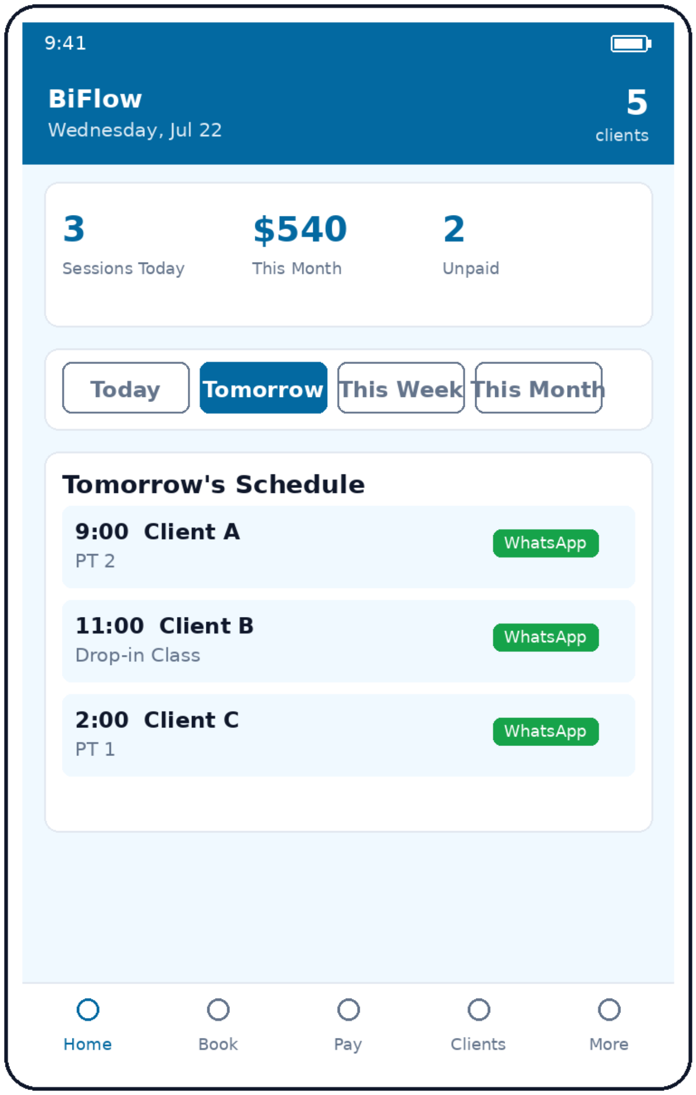


The activation screen — shown only on devices that require a subscription.

3 The Home Screen

The Home screen is what you see first when you open the app — a quick snapshot of your day and your month, so you always know where things stand at a glance.

- Sessions Today — how many appointments are booked for today
- This Month — total revenue recorded so far this month
- Unpaid — how many clients currently have an outstanding balance
- Today's Schedule — every appointment booked for today, in time order, with the client's name, service type, and location
- Reserved Packages Not Fully Paid — a quick list of clients who still owe money, so nothing slips through the cracks
- Tomorrow filter — next to Today, This Week, and This Month, jump straight to tomorrow's schedule
- Every appointment has a small WhatsApp button next to it, so you can send that client a friendly reminder with a single tap



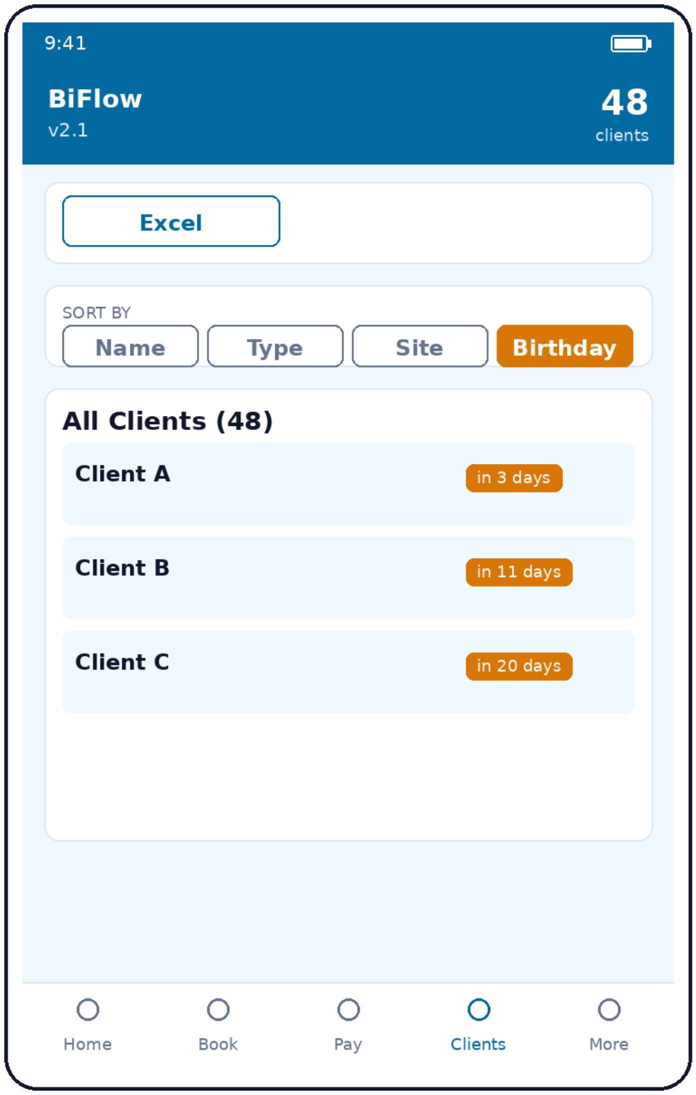
The Home screen — your day and month at a glance, with the Tomorrow filter and one-tap reminders.

4 Managing Clients

The Clients tab holds your full client list. Each client has a name, date of birth, phone number, site/location, service type, and how you found out about them (referral source).

Tap + Add New Client to create a new client record — you'll be asked for their name and these same details. Only the name is required; everything else can be filled in later.

- Statement — opens that client's full package and payment history (see Chapter 8)
- Progress — opens that client's session-by-session progress sheet (see Chapter 9)
- Sort by Name, Type, Site, Source, or Birthday — sorting by Birthday lists whoever's birthday is coming up soonest, with a countdown and a one-tap wish button
- An Excel button downloads a clean spreadsheet of your client list in whatever sort order you have selected
- Use the search bar at the top to quickly find a client by name as your list grows



The Clients tab — full client list, birthday countdowns, and Excel export.

5 Service Types, Sites & Referral Sources

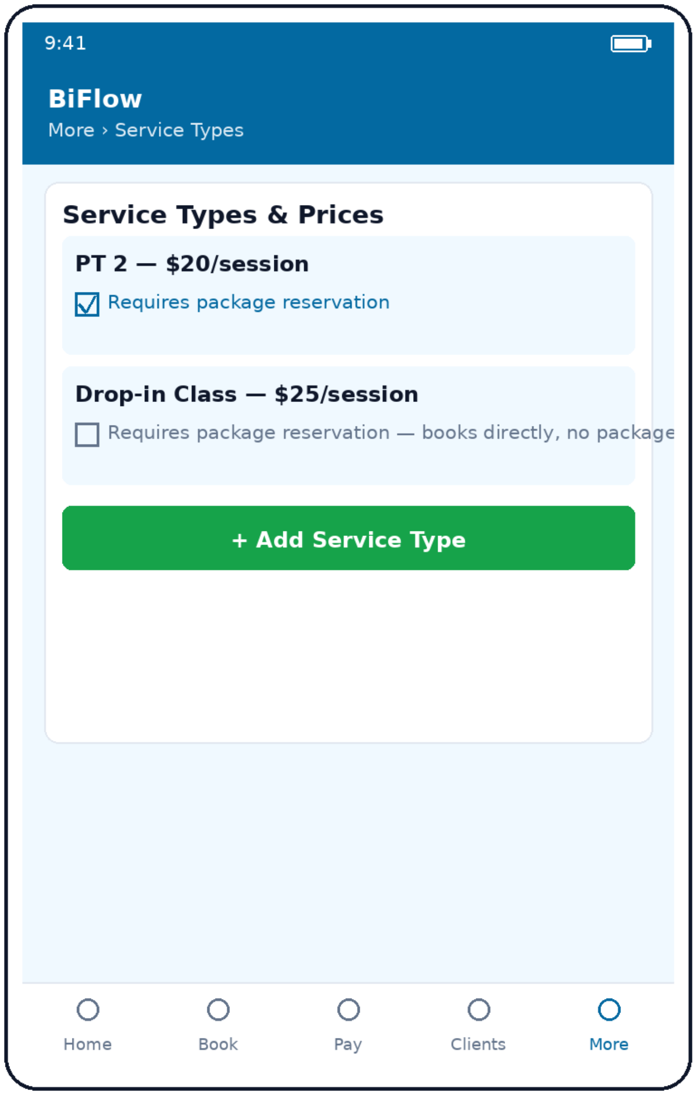
Before booking sessions, it helps to set up three simple lists that the rest of the app uses everywhere: Service Types (what you offer and what it costs), Sites (the locations where you work), and Referral Sources (how clients found you). These are managed from the More tab.

Service Types — each type has a name (like “PT 1” or “PH 2”) and a price per session. This price is used automatically to calculate the total value whenever you reserve a package of sessions for a client.

Requires Package Reservation — each Service Type also has this checkbox, on by default. Leave it checked for services sold in advance as a block of sessions (a package). Uncheck it for services that are billed one appointment at a time, with no upfront package — see Chapter 6 for how this changes the Booking screen.

- To add a new Service Type, type its name and price, choose whether it requires a package, then tap + Add Service Type
- To add a new Site or Referral Source, type the name and tap + Add
- Once added, these all appear as options anywhere you assign a type, site, or source to a client or appointment

Tip: A single business can mix both kinds of Service Type — for example, a gym might sell 10-session packages for Personal Training, while also offering a Drop-in Class that's booked and paid one visit at a time.



Managing Service Types (with the Requires Package toggle), Sites, and Referral Sources.

6 Booking — Packages, Direct-Booking & Cases

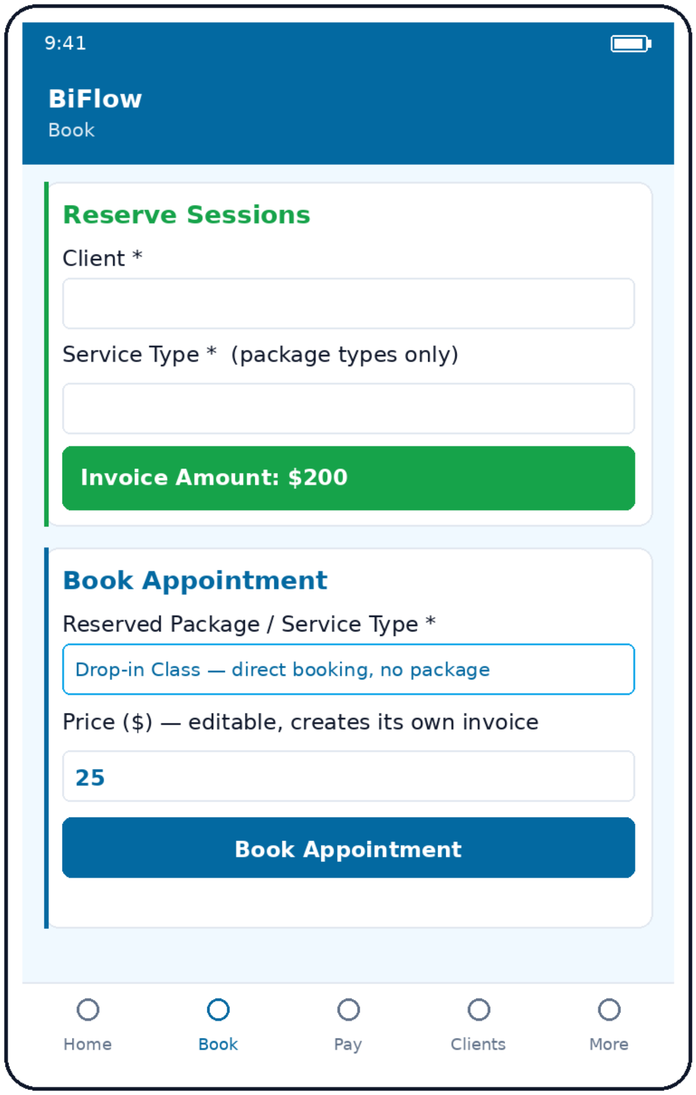
BiFlow supports three ways of billing: Packages, Direct-Booking, and Cases. Which one applies to a given booking depends on the Service Type you choose (see Chapter 5) for Packages and Direct-Booking — you never have to think about “modes”, the app adapts automatically. Cases are opened separately, per client, and are covered in full in Chapter 19.

Packages (the classic model): first you reserve a package of sessions for a client (for example, 10 sessions of “PT 2”), and then you book individual appointments against that package as the client actually comes in for each session. Reserving a package: choose the client, choose the service type, and enter how many sessions they're buying — the app automatically calculates the total value and creates the invoice for that package right away.

Direct-booking (no package): for Service Types marked “no package needed”, the Book screen shows that type directly in the same dropdown as your reserved packages. Pick it, enter a price, and tapping Book Appointment does everything in one step — creates the appointment, and its own invoice, immediately. There's no session count to run out of, since each appointment is billed entirely on its own.

- A client can have more than one reserved package at a time (for example, if they renew before finishing their current one)
- If a package is fully used, the app will let you know — you'll need to reserve a new package before booking further sessions from that type
- Every appointment is automatically tagged with the site and service type from the package it belongs to
- A dentist, lawyer, or similar professional billing per visit rather than per package would typically mark their relevant types as direct-booking, or open a Case if the billing doesn't line up neatly with visits (Chapter 22)
- If a client has an open Case, booking a session against it appears as a third option in the same dropdown — no package or price needed, since Case billing is handled separately

Tip: Always reserve the package first, before the client's first session, for package-based types — this keeps the session count accurate from day one. For a quick side-by-side comparison of all three sales methods, see the Sales Methods & Invoicing Guide at the end of this document.



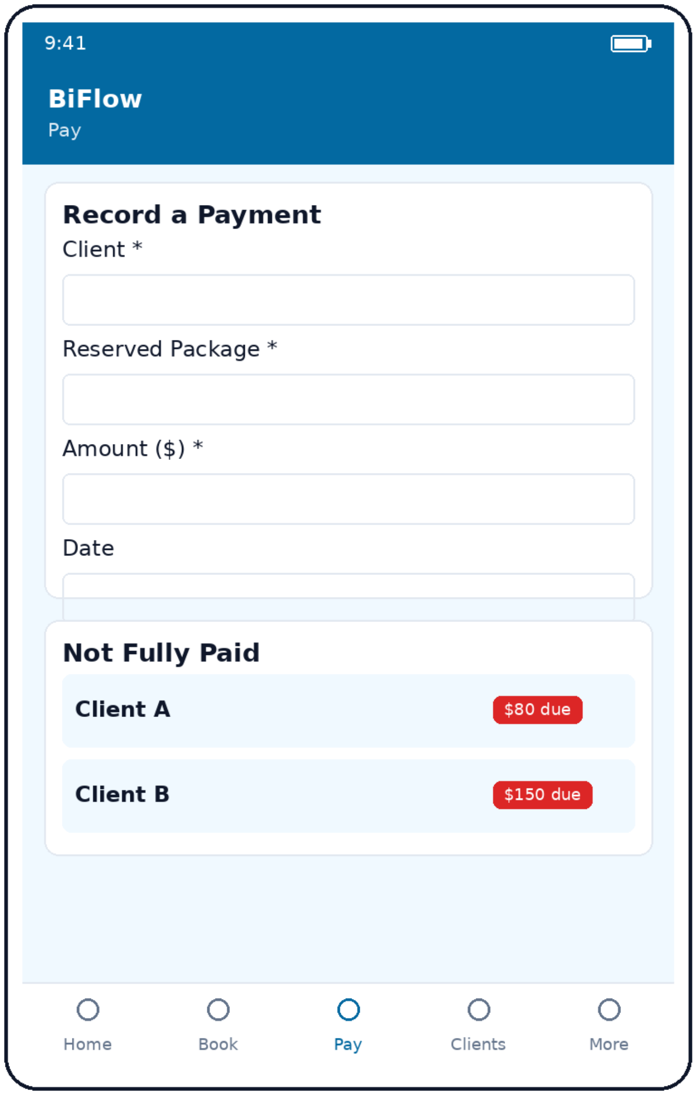
The Book tab — reserving a package, or booking a direct-booking type in one step.

7 Recording & Tracking Payments

The Pay tab is where you record money received from clients, and where you can see at a glance who still owes you money.

To record a payment, choose the client and which of their reserved packages the payment is for, enter the amount and date, and save. Payments can be partial — you can record several smaller payments against the same package over time until it's fully paid. Every payment automatically generates its own receipt, printable straight from the same screen.

- The Reserved Packages Not Fully Paid list updates automatically and shows exactly how much each client still owes
- Payment History shows every payment ever recorded, and can be filtered by date range or by a specific client
- A package shows as fully paid the moment the total of all payments against it reaches its full value
- Outstanding balances are calculated automatically — the app always knows exactly who owes what



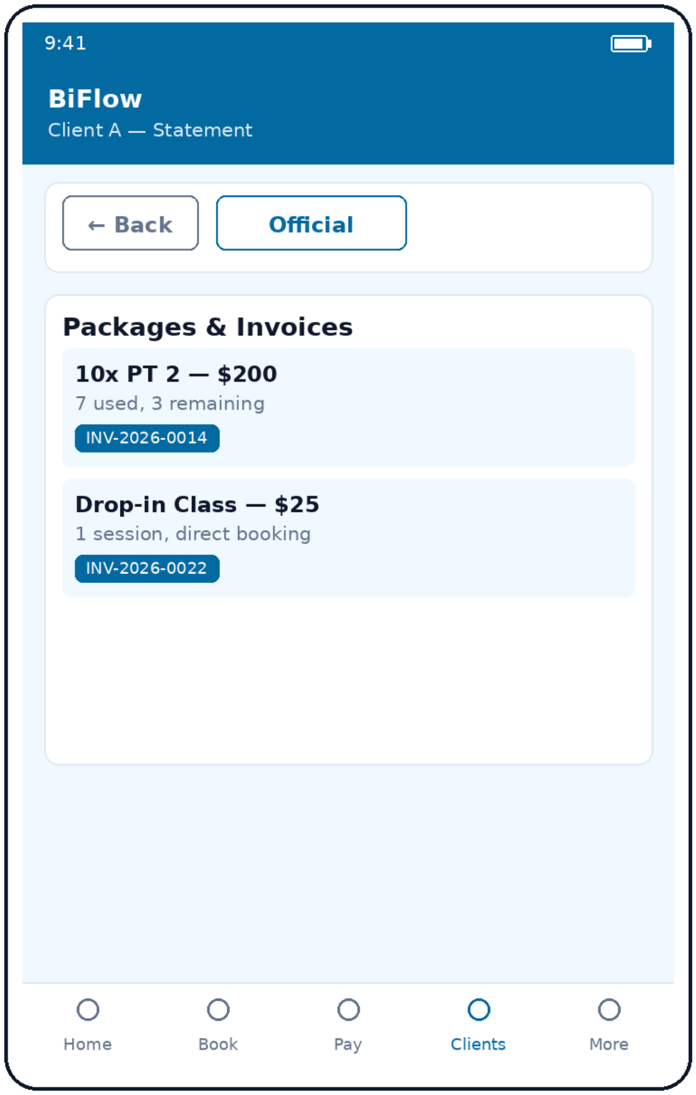
The Pay tab — recording a payment and reviewing outstanding balances.

8 Client Statements

Every client has a full Statement — their complete history in one place. Open it by tapping the Statement icon next to any client's name in the Clients tab.

The Statement shows every package the client has ever reserved (past and current), how many sessions were used from each, every individual session date, and the full payment history for that client — including every invoice and receipt generated along the way.

- See total sessions reserved, sessions used, and total amount paid at a glance
- Scroll through the full history of every package, session, invoice, and receipt
- Tap Progress to jump straight to that client's progress sheet
- Export the statement as an Excel file or a clean, printable PDF — useful for sending to the client or keeping records
- An Official Statement view is also available — see Chapter 18



A client's Statement — full package history, sessions, payments, and invoices in one place.

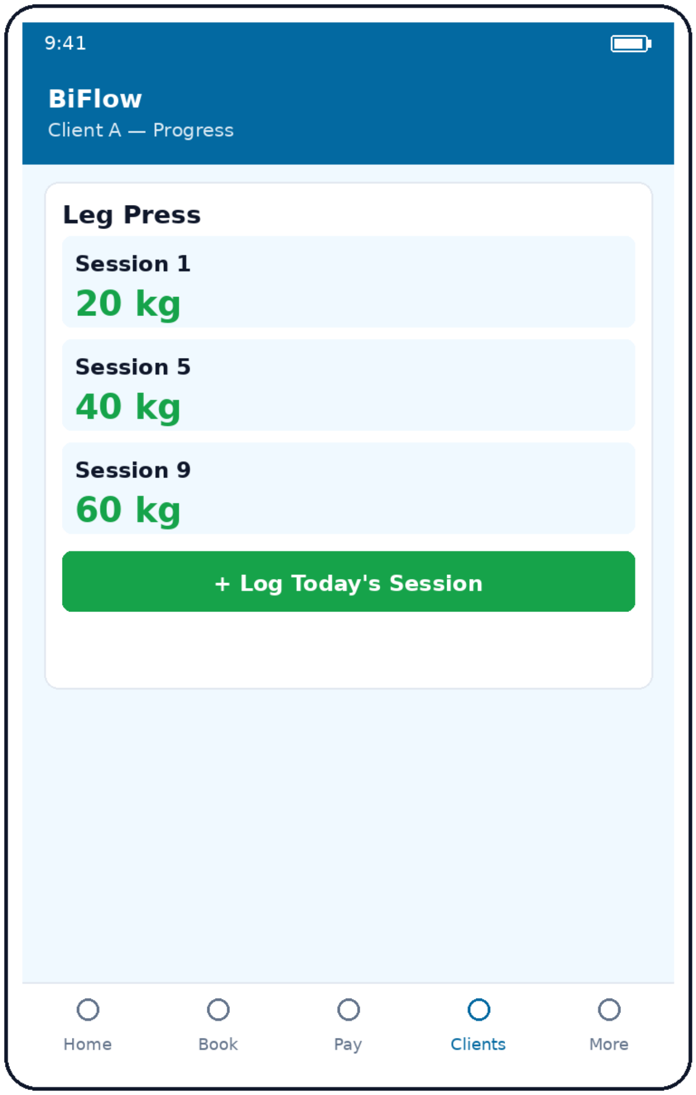
9 Progress Sheets

The Progress Sheet lets you record exercises and numbers for a client at every session — great for showing real, visible progress over time, whether you're a personal trainer tracking strength gains or a physiotherapist tracking rehabilitation.

Each client's progress sheet starts with some basic notes (age, weight, height, reason for visit, and goals), and then a running log of exercises tracked session by session.

Your shared exercise list can be organized into groups (for example Upper, Legs, Core) from the More tab — create a group, then use the small dropdown next to any exercise to move it into that group. When logging a session, the exercise picker shows exercises sectioned by group, so you can jump straight to the right category instead of scrolling through everything.

- Tap + Log Today's Session to add exercises and numbers for the current visit
- Previous sessions stay visible side-by-side, so you and the client can see improvement clearly (for example, going from 20kg to 60kg on Leg Press over 9 sessions)
- Exercises are picked from a shared list, which you can add to over time
- Group exercises from More → Exercise List — any exercise not yet assigned a group simply shows under “Ungrouped”



A client's Progress Sheet, showing session-by-session tracking of exercises.

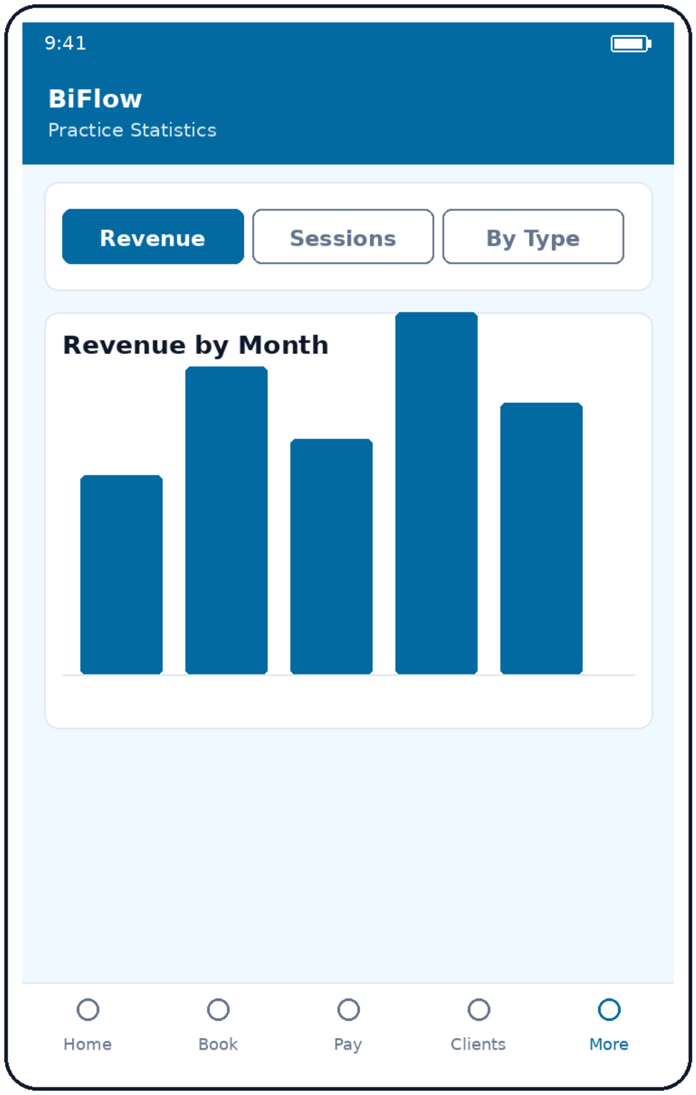
10 Practice Statistics & Charts

The More tab includes a Practice Statistics summary — a bird's-eye view of your whole practice, not just one client.

It shows your total sessions delivered, total revenue collected, and total outstanding balance across every client, for whatever date range you choose. You can also filter by service type, site, or referral source to see which parts of your business are performing best.

Below the numbers, three toggle buttons — Revenue, Sessions, and By Type — switch between three different charts, all built from the same filtered data as the numbers above.

- Filter by date range: Today, This Week, This Month, or any custom range
- Revenue — a bar chart of income by month
- Sessions — a bar chart of how many sessions were booked each month
- By Type — a horizontal bar chart comparing revenue across your different service types
- Tap Print Statistics PDF for a clean, printable report — including a detailed page for every client, plus a page for each chart



Practice Statistics, with the Revenue / Sessions / By Type chart toggle.

11 Client Statistics — Revenue Ranking & Alerts

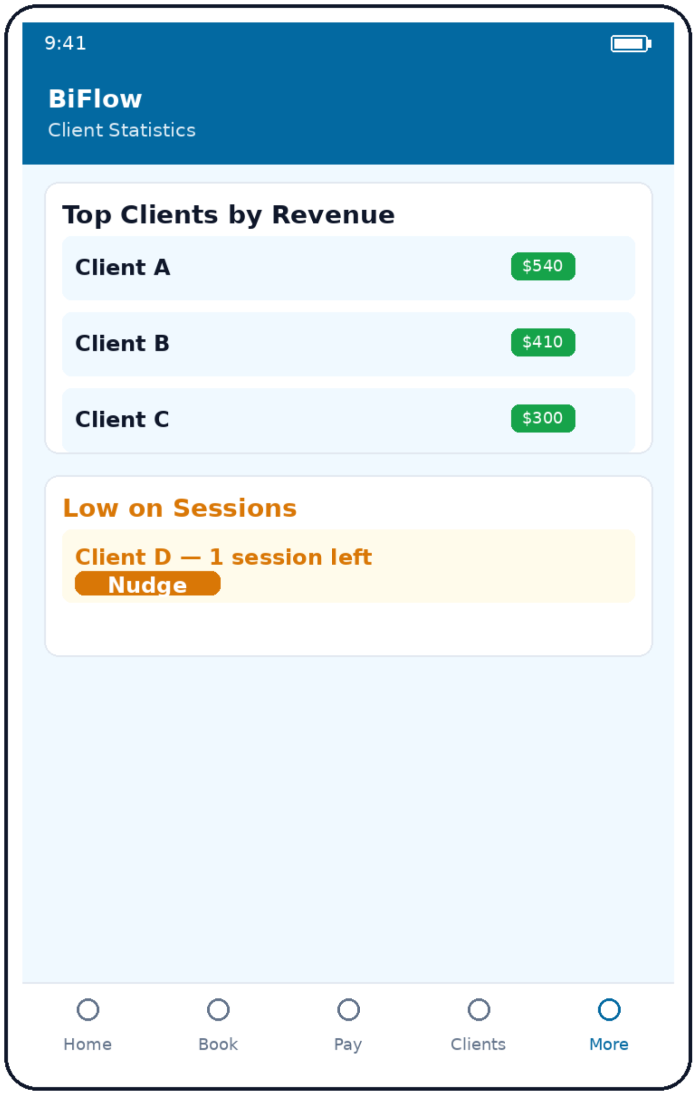
A page separate from Practice Statistics, focused entirely on your clients. Open it from the More tab by tapping Client Statistics.

Top Clients by Revenue — a ranked chart and list showing every client sorted by how much revenue they've generated in the period you've selected, along with how many visits they've made and which service type(s) they used.

Low on Sessions — shows every client with only 1 or 2 sessions left in their current package — the perfect moment to suggest a renewal. Each row has a one-tap Nudge button that opens WhatsApp with a friendly renewal message already written.

Recently Completed — shows clients whose package was fully used up within the last 14 days — a useful “who should I follow up with” list.

- A Print Client Statistics PDF button makes a separate PDF report with the ranking table, the chart, and both alert lists



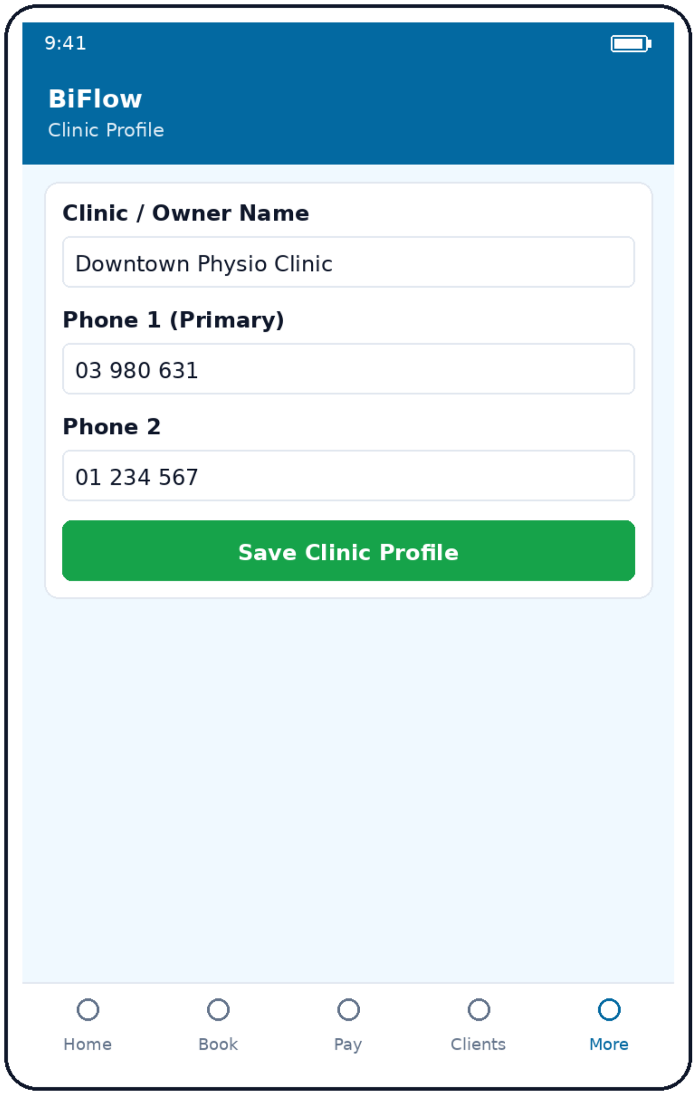
The Client Statistics page — revenue ranking, low-session alerts, and one-tap WhatsApp nudges.

12 Clinic Profile — Your Branding

Found in the More tab, Clinic Profile is where you personalize BiFlow with your own business identity — it only takes a minute to set up, and it's used throughout the app.

- Clinic / Owner Name — replaces “Clinic Manager” in the app's header, and appears in the title of every printed PDF
- Logo — shows next to your name in the app header, and prints in the top-left corner of every PDF's header bar
- Two phone numbers, with a toggle to mark which one is your Primary WhatsApp number — this is the number referenced in outgoing messages and reminders

Nothing changes until you tap Save Clinic Profile. Once saved, your name and logo appear immediately across the app and on new PDF exports.



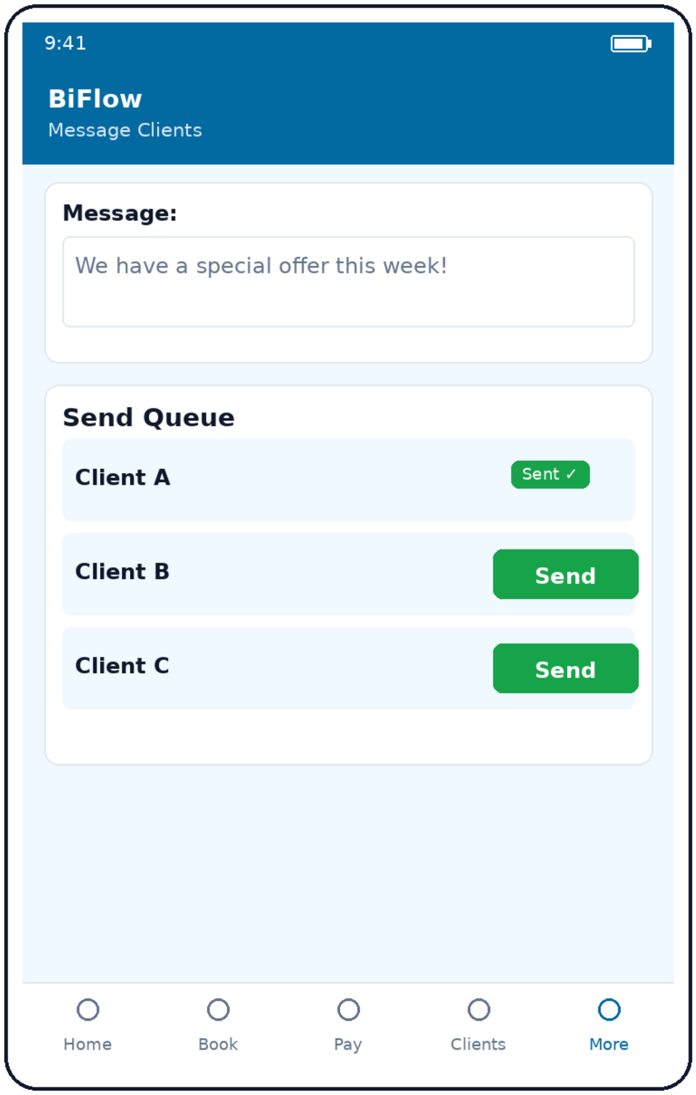
Clinic Profile — set your name, logo, and phone numbers once; they appear everywhere.

13 WhatsApp Messaging — Nudges, Reminders & Broadcasts

BiFlow can prepare WhatsApp messages for you in three different situations, using your Clinic Profile name and the client's own phone number. Because WhatsApp doesn't allow truly automatic bulk sending for free, each message still needs one tap to send — but the typing is already done for you.

- Low on Sessions — from the Client Statistics page, nudge any client who's down to 1–2 sessions left, suggesting a renewal
- Appointment Reminder — from the Home tab, remind any client about an upcoming appointment (use the Tomorrow filter to prep the next day's reminders)
- Free Text — from the Message Clients page, write any message and send it to one, several, or all of your clients

Using Free Text broadcasts: open More → Message Clients, type your message, then tick the clients you want to reach (or tap Select All). A Send Queue appears below, listing each selected client with their own Send button. Tap through them one at a time — each tap opens WhatsApp pre-filled, ready to send. Sent clients are marked with a checkmark so you always know where you left off.



Message Clients — write once, select your clients, then tap through the send queue.

14 AI Voice Assistant

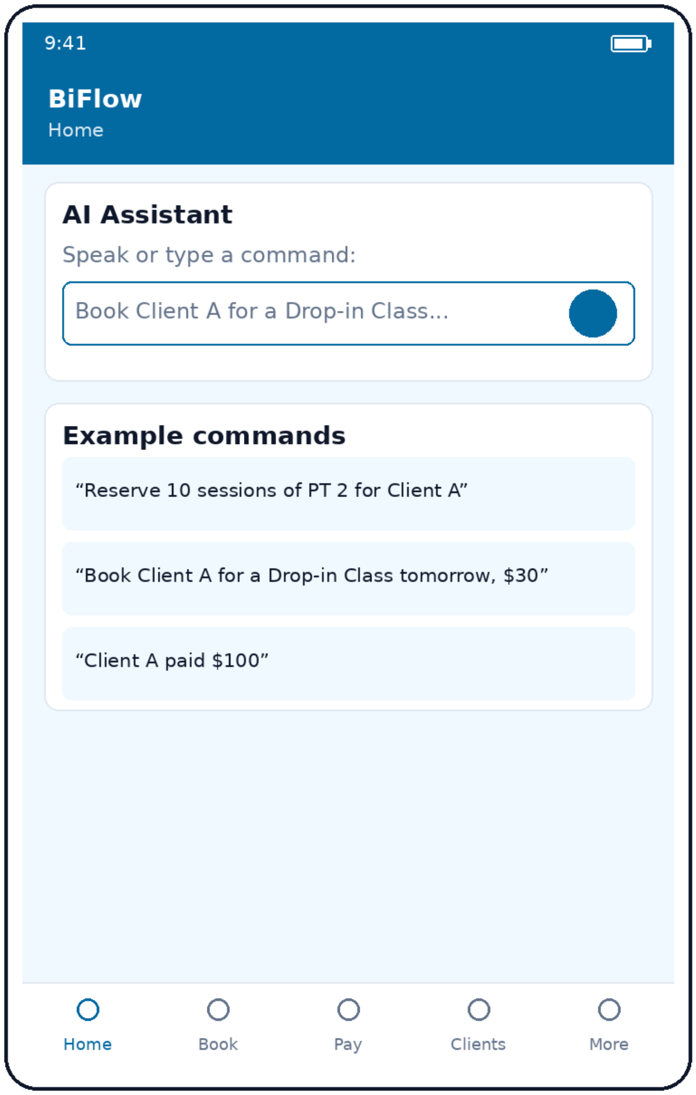
A microphone and command bar on your Home screen lets you speak or type plain-English instructions instead of tapping through menus — useful when your hands are busy, or just faster for quick actions.

Note: depending on your plan, this may be included or available as an optional add-on — check the More tab to see whether it's active on your account, or to add it.

The assistant understands all three sales methods, including Cases — it can open a new case (always asking you to confirm first), book an appointment against one, add an invoice or credit note to one, and it will ask whether to register any of these as official documents right after creating them.

- Reserve a package — “Reserve 10 sessions of PT 2 for Client A”
- Book a package-based appointment — “Book Client A tomorrow at 5pm” (automatically uses their active package)
- Book a direct-booking type — “Book Client A for a Drop-in Class tomorrow at 2pm, $30” — creates the appointment and its invoice in one step, no package involved
- Open a case — “Open a case for Client A called Knee Rehabilitation” — the assistant always asks you to confirm before creating it
- Add to a case — “Add a $400 invoice to Client A's case for the treatment plan”, or “Add a $50 credit note to Client A's case for a refund”
- Book against a case — “Book Client A for the knee rehab case next Tuesday at 9am”
- Cancel or reschedule an appointment — “Cancel Client A's appointment tomorrow”
- Record a payment — “Client A paid $100” — if Client A owes on both a package and a case, the assistant won't guess which one; it'll ask you to specify
- Add or update a client — “Add new client Sara, phone 03-123456”
- Log a progress note — “Log today's session for Client A: leg press 60kg”
- Navigate the app, or ask a question — “How many sessions does Client A have left?”

Tip: If you don't say which package or appointment you mean, the assistant picks the most sensible match automatically (like a human assistant would) — you can always double-check or correct it manually in Book or Pay afterward. Two things aren't yet supported by voice: adding a Discount/Return credit note to a Package or Direct-Booking sale, and making an already-existing document official after the fact — both are still quick to do by tapping in the app.



The AI Assistant — tap the mic and speak, or type a command directly.

15 Invoicing — Automatic Invoices for Every Sale

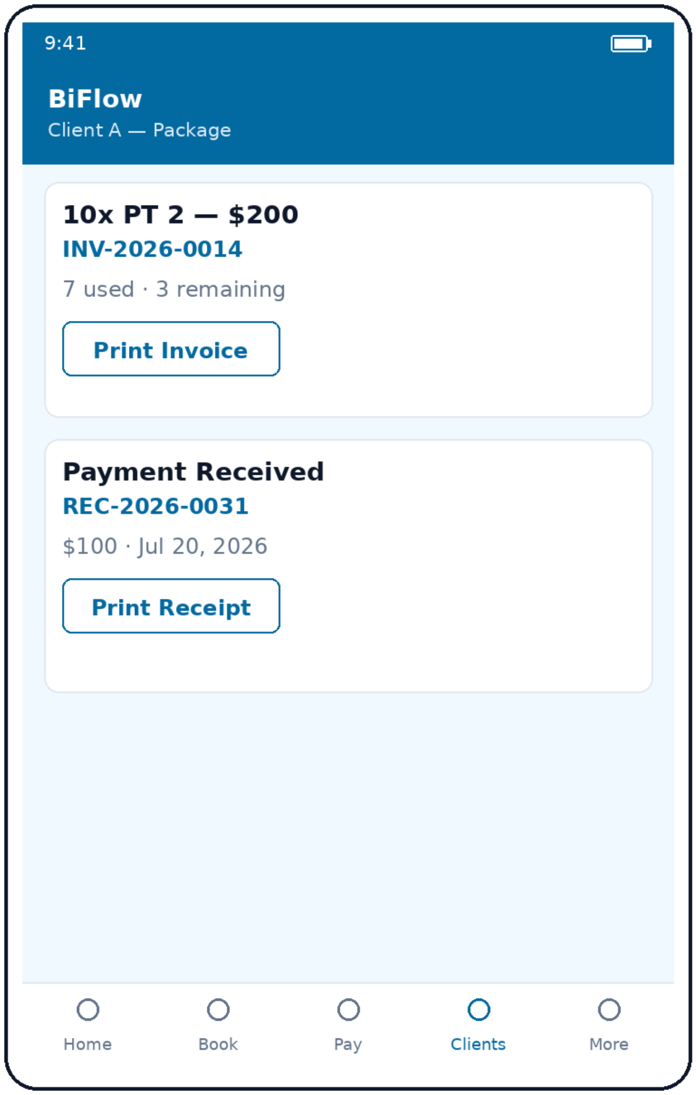
Regular invoicing is included free in every plan — there's nothing to activate and nothing extra to pay. Every time money is committed — a package reserved, a direct-booking appointment made, or an invoice added to a Case — BiFlow automatically creates an invoice for it. You never have to remember to invoice anything separately; it's already done by the time you finish booking (or, for a Case, the moment you tap Add Invoice).

Each invoice gets its own sequential serial number (for example INV-2026-0001), shown right under the package or appointment it belongs to. Tapping the small invoice icon downloads a clean, printable PDF you can hand to the client or keep for your records.

The same automatic invoicing applies to payments — every payment you record generates a matching receipt (for example REC-2026-0001) the moment it's saved.

- Invoices and receipts stay in sync automatically — if you edit a package's price or sessions, its invoice updates to match
- Credit Notes reduce what's owed instead of adding to it — for a Package or Direct-Booking sale, use “Discount / Return (custom)” under Reserve Sessions; for a Case, use the dedicated Add Credit Note button
- Every total is spelled out in words too, underneath the amount — “Three Hundred Fifty Dollars Only” — on every Invoice, Receipt, and Credit Note
- Your own stamp and signature can appear automatically on every document too — see Chapter 26
- None of this requires any extra setup — it works the moment you start reserving packages, booking direct, or opening a case

Invoice Settings, in the More tab, is where you set your business name, logo, and (if applicable) VAT details used on every invoice. Only official, tax-compliant documents are a paid add-on — see Chapter 16.



An invoice number appears automatically the moment a package or direct appointment is created.

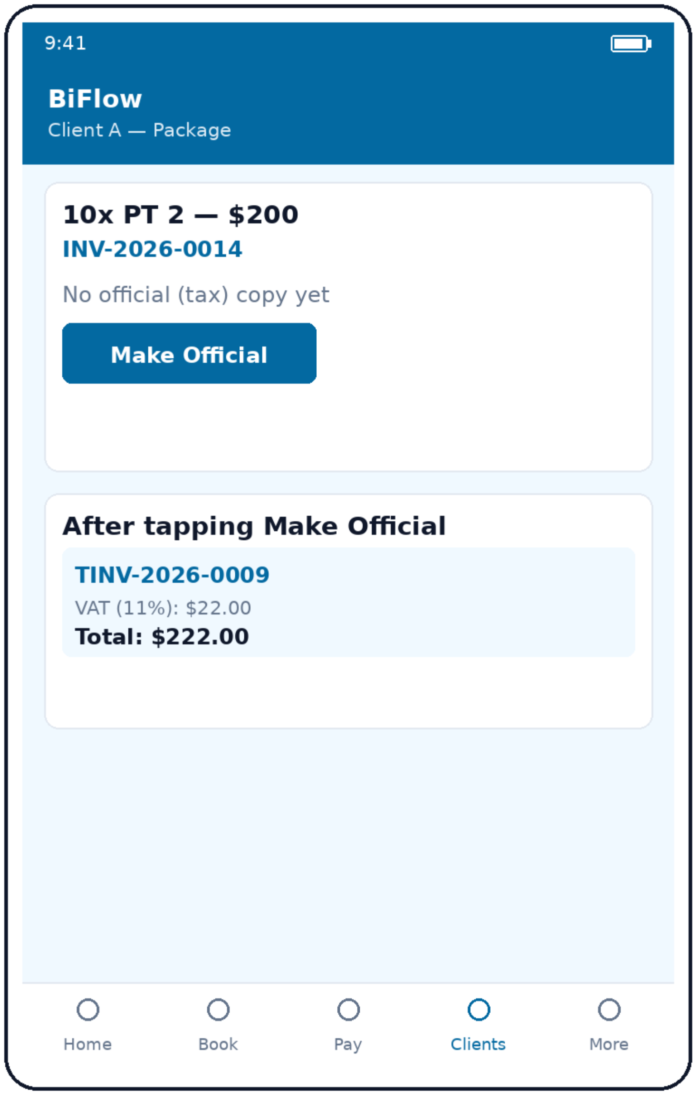
16 Official Documents — Tax Invoices & Receipts

The everyday invoices and receipts from Chapter 15 are informal documents — free, included in every plan, and perfectly fine for most day-to-day record-keeping. When you need a government-compliant tax document instead (for a client who needs one for their own records, or for your own tax filing), BiFlow can generate that too, with a single tap — this is the one part of invoicing that's a paid add-on, at $5/month.

Next to any invoice, receipt, or credit note, tap Make Official. This creates a linked, separate document in its own official series (TINV for tax invoices, TREC for tax receipts, TCN for tax credit notes) with your VAT number, VAT breakdown, and business details from Invoice Settings.

- Official documents are always linked to the original invoice or receipt they came from, and can be resynced if you edit the original's amount
- If you cancel an official document, it's marked as cancelled rather than deleted — its serial number is never reused, keeping your document sequence intact for audit purposes
- Set up your VAT registration number and VAT rate once, in Invoice Settings, and every official document uses it automatically from then on
- This works identically no matter which sales method the document came from — Package, Direct-Booking, or Case

Not every business needs official documents day to day — this is why it's a separate, one-tap action and a separate add-on, rather than automatic, so you only pay for it if you actually need it.



Tapping Make Official turns a regular invoice or receipt into a signed tax document.

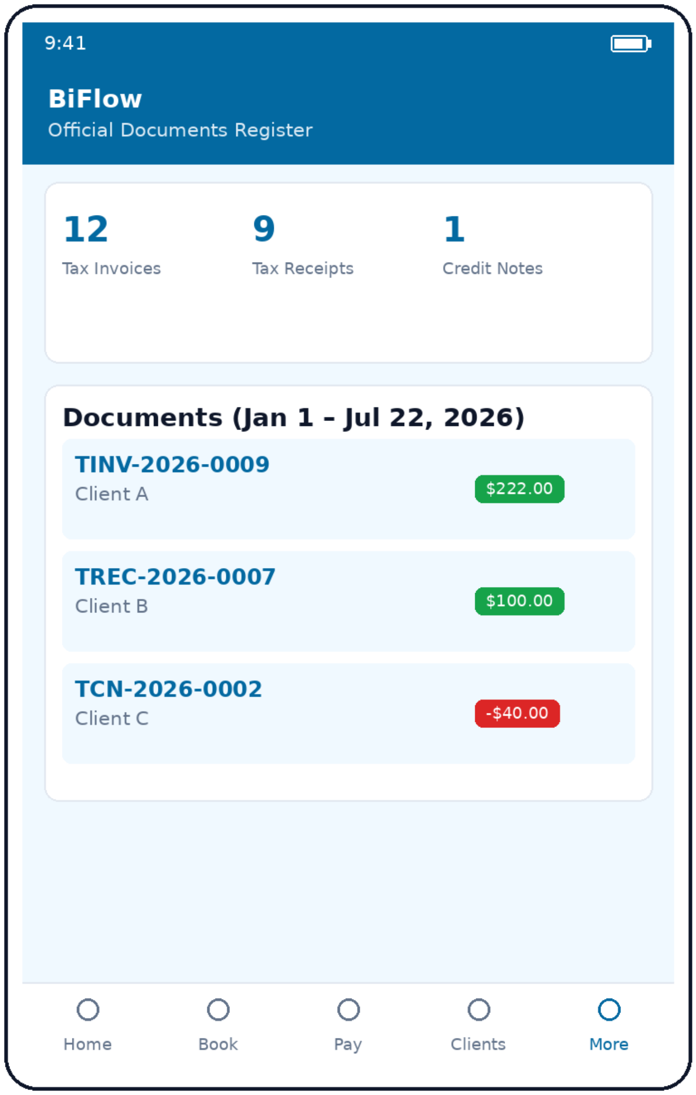
17 The Official Documents Register

Found in the More tab, the Official Documents Register is a single place listing every official invoice, receipt, and credit note you've ever generated, for whatever date range you choose — across all three sales methods.

This is the page to use when preparing a tax declaration or reviewing your official paper trail — it shows running totals for each document type, and flags anything that's fallen out of sync with its original invoice (for example, if a package's price changed after its official copy was made) so you can resync it with one tap.

There's also a Normal Documents Register alongside it — see Chapter 24 — for sending your everyday (non-tax) invoicing to your accountant in one go.

- Filter by any date range and see totals update instantly
- Grouped by document type — tax invoices, tax receipts, and tax credit notes each shown separately
- “Print Tax Register List PDF” downloads the summary with totals; “Print Tax Register PDF” downloads every actual document combined into one PDF, ready to email
- A Resync All button fixes any documents that fell out of sync in one action
- Export the whole register as a printable PDF or an Excel file for your accountant



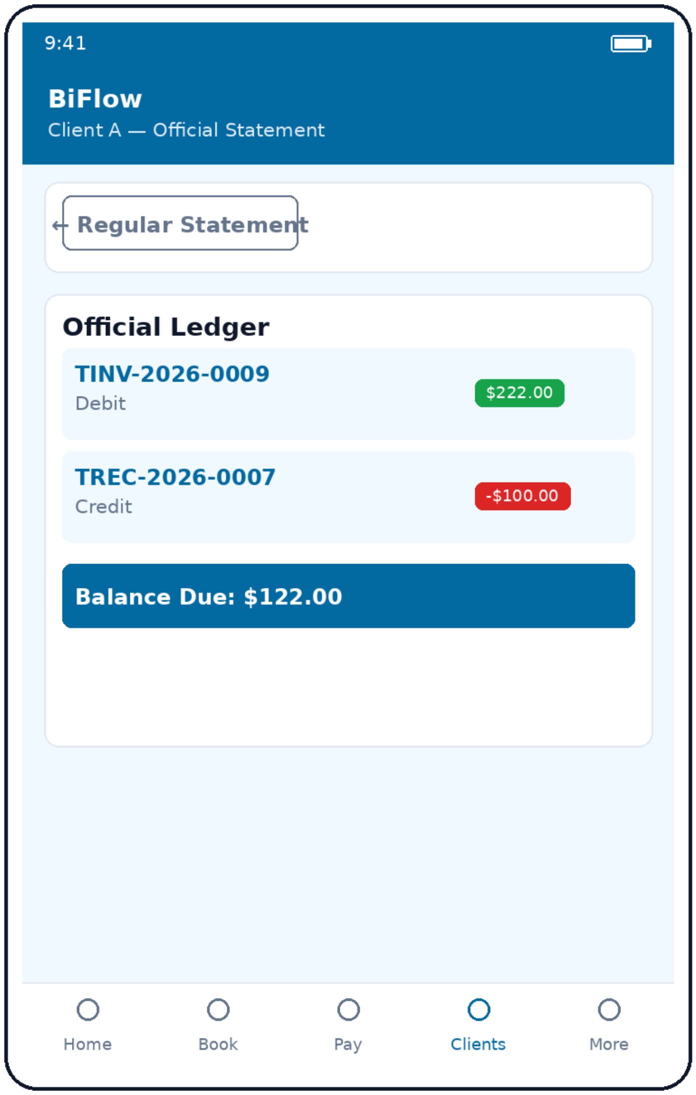
The Official Documents Register — every official invoice, receipt, and credit note, with running totals.

18 Official Client Statements

From any client's Statement (Chapter 8), tap Official Statement to switch to a version showing only that client's official documents — a running ledger of debits, credits, and balance, built entirely from their tax invoices, tax receipts, and tax credit notes.

This is the version to hand to a client who specifically needs an official statement of their account, separate from the everyday informal Statement.

- Switch back to the regular Statement at any time with a single tap
- Download as a clean, printable PDF just like the regular Statement
- Only includes documents that have actually been Made Official — informal-only invoices and receipts won't appear here



The Official Statement — a clean ledger of a single client's official documents only.

19 Exporting to Excel

BiFlow offers two different Excel exports, for two different purposes.

Full data export (More tab) — downloads your entire client list, packages, appointments, and payments as a single structured Excel file. You can edit that file on your computer (only edit the existing cells — names, codes, prices — without adding or removing columns or sheets, since the app expects the same layout when reading it back), then upload it back into the app to apply your changes.

Client List export (Clients tab) — a simpler, standalone spreadsheet just for viewing, printing, or sharing your client list — name, date of birth, phone, type, site, source, and balance — in whichever sort order you currently have selected. This file is not meant to be re-uploaded; it's purely for your own reference.

20 Backing Up & Restoring Your Data

Since all of your data lives on your own device rather than on someone else's server, it's a good habit to back it up from time to time — and essential if you ever want to move to a new phone or computer.

To back up your data: in the More tab, tap Export Backup. This saves a single file (in JSON format) containing every client, package, appointment, payment, invoice, and progress sheet you have. Keep this file somewhere safe — emailed to yourself, saved to a cloud drive, or copied to a computer.

Backup via WhatsApp offers a quicker path to the same result: tap it, and your phone's Share screen opens with the backup file already attached — pick WhatsApp, choose “Message Yourself,” and send. On devices where the Share screen can't attach a file directly, the file downloads as normal and, if you've set a WhatsApp number in Backup settings, a chat to yourself opens automatically so you only need to attach it manually.

The app also keeps an eye on this for you: if it's been a week or more since your last backup (by either method), a reminder appears on the Home screen with a one-tap button to back up right then, or a “Not now” option to be asked again in a few days.

To restore your data (for example, on a new phone): install BiFlow on the new device, activate it if needed, then in the More tab tap Restore Backup and choose your saved backup file. All of your data will load in exactly as it was.

Tip: Make a fresh backup every so often, especially before a big update or before switching devices. Prefer this to happen automatically instead? See Chapter 27 for optional backup to your own Google Drive.

21 My Subscription — Reviewing & Renewing

Everything about your subscription lives in one place: go to More → My Subscription. There's no need to leave the app or visit the marketing website to check where you stand — it's all right there.

This screen shows your current plan status at a glance — how many days remain until your next renewal, shown in green when you're comfortably covered, amber inside the last week, and clearly flagged if it's already expired. Below that, it shows whether Voice and Official Tax Documents are active on your account, with a one-tap button to request either one if you don't have it yet. And a Renew button lets you ask for your next billing period before your current one ends, so there's never a gap where the app stops working.

If you're still within your free trial month (see Chapter 2), this same screen shows your trial countdown instead, and the button reads Subscribe Now rather than Renew — since there's nothing to renew yet. The moment you activate a real paid code, it switches over automatically.

- Tapping Renew (or Subscribe Now) or Add on either add-on opens WhatsApp with your Device ID already filled in, so there's nothing to copy or type
- Payment itself is still handled directly with your provider via Whish Money, to the number shown in the message
- Once payment is confirmed, you'll receive a new activation code — paste it into the box at the bottom of the My Subscription screen and tap Apply Code
- Applying a new code takes effect immediately, with no data lost and no need to reinstall or reopen the app

Plan	Price	Notes
Monthly	$19 / month	Billed every month, cancel anytime
3 Months	$49 / 3 months	≈ $16.33/month — most popular
Yearly	$199 / year	≈ $16.58/month — best value
Voice add-on	$5 / month	Optional — the AI Voice Assistant
Official Tax Documents add-on	$5 / month	Optional — VAT-compliant tax invoices, receipts & credit notes. Regular invoicing (Chapter 15) is already free on every plan — this only unlocks the official versions

As your subscription approaches its expiry date, the app will also show a reminder banner at the top of the Home screen, so renewing is never a last-minute surprise — but My Subscription is the place to go the moment you decide to act on it.

22 Selling by Case — Open-Ended Treatments & Matters

A Case is the third sales method, alongside Packages and Direct-Booking — built for work that doesn't map neatly onto a fixed number of sessions bought upfront. Think of it as a folder you open for one client's situation: a dental treatment plan, a legal matter, any multi-stage or unpredictable piece of work.

The key idea: booking a visit against a case (optional, just for record-keeping and progress notes) and adding an invoice to that case (manual, whenever you decide) are two completely separate actions. There's no fixed relationship between how many times a client visits and how many invoices you've raised — you could have five visits and two invoices, or the reverse.

To open a case: go to the client's Statement, scroll to Cases, type a name (for example “Ahmad — Dental Treatment”) and tap Open a Case. From there, everything for that situation lives on one screen.

- Add Invoice — any description and amount, whenever you decide to bill something
- Add Credit Note — reduces what's owed, for a refund, discount, or cancelled work (see Chapter 23)
- Add Payment — any amount, any time, against the case's running balance
- Book an appointment against the case — appears as its own option in the Book screen's dropdown, no package or price needed
- Every invoice, credit note, and payment can be edited or (if nothing official has been made from it yet) deleted, and each can be made official with one tap
- Rename a case any time with the pencil icon; delete an empty case by mistake with the Delete Case button — this is blocked once real invoices or payments exist, to protect your records
- Close a case once the work is finished, or reopen it later if the client comes back

A simple rule of thumb: if one visit should always produce exactly one bill for the same thing, use Direct-Booking. If the billing doesn't line up neatly with visits, use a Case.

23 Credit Notes — Discounts, Refunds & Corrections

A Credit Note is the opposite of an invoice: instead of adding to what a client owes, it reduces it. Use one for a discount, a partial refund, or work that was billed but never went ahead — without deleting the original invoice and losing that record.

Every sales method supports Credit Notes, though the exact steps differ slightly:

- Package or Direct-Booking — go to Book → Reserve Sessions, choose “Discount / Return (custom)” in the Service Type dropdown, enter the amount as a negative number, and optionally link it to the specific package or visit it applies to
- Case — inside the case, use the dedicated Add Credit Note section: a reason, an amount (entered as a positive number here — the app subtracts it automatically), and a date
- Either way, a Credit Note gets its own CN- serial number, separate from your invoice numbering, and can be made official (as a TCN-) exactly like any other document

Whichever sales method you're using, the balance always updates correctly the moment a Credit Note is added — it reduces what's owed, it never adds to it.

24 The Normal Documents Register

Alongside the Official Documents Register (Chapter 17), there's a Normal Documents Register for your everyday, non-tax invoices, receipts, and credit notes — covering all three sales methods in one place.

This is the one to use when you just want to send everything to your accounting department in one go, without collecting documents one client at a time.

- Filter by date range, with This Month / This Year / All Time quick buttons
- Grouped by document type, each with its own subtotal
- “Print Normal Register List PDF” downloads the summary; “Print Normal Register PDF” downloads every actual document combined into one PDF
- Found in the same Invoicing section of the More tab as the Official Register

26 Digital Stamp & Signature

Every Invoice, Receipt, and Credit Note can carry your actual stamp and signature — scanned once, applied automatically from then on. No printing, stamping, and re-scanning documents by hand.

You'll find this in More → Invoice Settings, in both the Normal and Official (Tax) sections — since each can have its own stamp if you'd like, or the same one in both places.

Start by measuring your actual stamp (with signature) in centimeters — length and width. This keeps it printing at true, real-world size on your documents, rather than a stretched or guessed size. Then take a photo of it on plain paper (or upload an existing one), and use the sensitivity slider to clean it up — drag it until only the ink is left and the paper background disappears completely.

- Once saved, it appears automatically on every relevant document — Invoices, Receipts, Credit Notes, Client Statements, and both Registers
- The Normal and Official versions are entirely independent — add, change, or remove either one without affecting the other
- Remove it at any time with one tap, if you change your mind — documents simply go back to how they looked before
- Progress Sheets and the internal Statistics PDFs never show a stamp — these aren't official or client-facing financial documents

A tip for best results: photograph the stamp on plain white paper, in good even lighting, straight-on rather than at an angle — this gives the cleanup slider the clearest ink-versus-paper contrast to work with.

27 Automatic Cloud Backup (Google Drive)

Backing up manually (Chapter 20) works well, but it only helps if it's actually done regularly. For a safety net that needs no reminders, BiFlow can back itself up automatically to your own Google Drive — entirely optional, and switched off unless you turn it on yourself.

Find this in More → Auto Backup to Google Drive. Tap Connect Google Drive, and sign in with your own Google account the same way you would for any other app — nothing about this sign-in is seen or stored by anyone else. BiFlow creates a folder called "BiFlow Backups" in your Drive and starts backing up there automatically from that point on.

Choose how often it happens — Daily, Weekly, or Monthly — right on the same screen, and change your mind about the frequency, or disconnect entirely, any time.

- “Last backed up: ...” is always shown clearly on this screen, so you always know where you stand
- Only your 5 most recent backups are kept in Drive — older ones are cleaned up automatically, so there's never a long list to search through
- To restore, tap Restore from Cloud, pick one of the last 5 dated backups shown, and confirm — no searching through files or folders yourself
- Restoring replaces everything currently on the device, so BiFlow always asks you to confirm the date first

This is genuinely optional — BiFlow works exactly the same with or without it. It's simply there for anyone who wants one less thing to remember.

28 Getting Help

This guide covers everything BiFlow can do. If you ever run into something unexpected, or have a question this guide doesn't answer, reach out via WhatsApp using the same number shown on the activation and subscription screens.

Thank you for using BiFlow.

Turn the page for a bonus Sales Methods & Invoicing Guide — a side-by-side comparison of Packages, Direct-Booking, and Cases, plus three complete worked examples with the matching voice command for every step.

BiFlow

Sales Methods & Invoicing Guide

A complete reference with real, worked examples for every sales method — and, in brackets, the matching voice command for every step.

1. Choosing a Sales Method

BiFlow supports three different ways of billing a client. They're not interchangeable — each one exists for a genuinely different kind of situation. This table lays out exactly how they differ.

	Package	Direct-Booking	Case
What it's for	A bundle of sessions bought upfront	One single visit, billed on the spot	An open-ended situation (a treatment, a matter)
How billing gets triggered	Reserving the package creates one invoice; sessions get used up from it	Booking the appointment itself creates the invoice, automatically, every time	Nothing automatic — you add an invoice manually, whenever you decide
Appointments ↔ Invoices	Many appointments, but only the original package invoice	Exactly 1 appointment = exactly 1 invoice, always	No fixed relationship — could be many visits and few invoices, or the reverse
Payments	Usually one or a few, against the whole package	Usually one per visit	Any number of partial payments, anytime, against the running balance
Credit Notes	Yes — via Discount / Return, linked to the package	Yes — via Discount / Return, linked to the visit	Yes — a dedicated Add Credit Note option
Best for	Repeatable, bulk-bought sessions (10 PT sessions)	Simple, one-and-done visits (a single class, a drop-in)	Multi-stage or unpredictable work (a treatment over several visits, a legal matter)

The real difference between Direct-Booking and Case, in one sentence:

Direct-Booking fuses booking and billing together — the moment you book the appointment, the invoice exists, automatically, every time. Case completely separates them — booking a visit (optional, just for notes) and creating an invoice (manual, whenever you decide) are two independent actions that don't have to match up at all.

A simple rule of thumb: if one visit should always produce exactly one bill for the same thing, use Direct-Booking. If the billing doesn't line up neatly with visits — multiple charges, irregular payments, refunds, a situation that unfolds over time — use a Case.

2. Choosing a Document Type

Every sales method produces the same three kinds of paperwork. Each one exists in two forms: a regular version (included in every plan, no extra cost) and an official, tax-compliant version (a paid add-on for businesses that need VAT-compliant documents for their accountant).

	Invoice	Receipt	Credit Note
What it represents	Money owed by the client	Money received from the client	Reduces what's owed — a refund, discount, or cancelled work
Created when	Reserving a package, booking direct, or adding to a case	Recording any payment	Manually, whenever a reduction is needed
Regular version	Free — included in every plan	Free — included in every plan	Free — included in every plan
Official version	$5/month add-on. VAT-compliant tax document	$5/month add-on. VAT-compliant tax document	$5/month add-on. VAT-compliant tax document
Serial numbers	INV-... / official: TINV-...	REC-... / official: TREC-...	CN-... / official: TCN-...

Regular invoicing is never gated behind a paid add-on — only the official, tax-compliant versions are. You can invoice, receipt, and issue credit notes freely on any plan; the add-on is only for businesses that specifically need official tax documents.

3. Three Complete Examples

Below is one full, real, worked example for each sales method — from adding the client through to the final official document. Each step shows exactly what to tap in the app, and in brackets, the equivalent thing to say if you're using the AI Voice Assistant instead.

3.1 Package Example — Jordan Blake, a 10-session PT package

Step 1: Add a new client called "Jordan Blake."

> *[Voice: "Add a new client called Jordan Blake, phone 71 234 567"]*

Step 2: Go to Book → Reserve Sessions. Pick Jordan Blake, choose the PT 1 service type, enter 10 sessions at $35 each, and tap Reserve.

> → Invoice INV-2026-00xx created automatically for $350.
>
> *[Voice: "Reserve 10 sessions of PT 1 for Jordan Blake"]*

Step 3: Go to Book → Book Appointment. Pick Jordan Blake, the date and time, and the PT 1 package to book against.

> → One session used from the package. 9 remaining.
>
> *[Voice: "Book Jordan Blake for PT 1 tomorrow at 10am"]*

Step 4: Go to Pay. Record a payment of $150.

> → Receipt REC-2026-00xx created automatically.
>
> *[Voice: "Record a payment of $150 for Jordan Blake"]*

Step 5: Repeat Step 3 to book the remaining sessions over the following weeks, exactly the same way.

> *[Voice: "Book Jordan Blake for PT 1 next Monday at 10am"]*

Step 6: Once all sessions are used, record the remaining $200 payment.

> *[Voice: "Record a payment of $200 for Jordan Blake"]*

Step 7: Jordan is a long-time client, so you'd like to give a $20 loyalty discount. Go to Book → Reserve Sessions → choose "💸 Discount / Return (custom)", enter -$20, and link it to Jordan's PT 1 package.

> → A Credit Note (CN-2026-00xx) is created, reducing what Jordan owes by $20.
>
> *[Voice: not yet supported — adding a Package or Direct-Booking discount by voice]*

Step 8: Tap Make Official on the invoice, then on the receipt, to issue official tax documents for your accountant.

> → TINV-2026-00xx and TREC-2026-00xx created.
>
> *[Voice: not yet supported — making an existing document official by voice]*

3.2 Direct-Booking Example — Morgan Reyes, a Drop-in Class

Step 1: Add a new client called "Morgan Reyes."

> *[Voice: "Add a new client called Morgan Reyes, phone 71 345 678"]*

Step 2: Go to Book → Book Appointment. Pick Morgan Reyes, the date and time, and the Drop-in Class type — no package needed.

→ Invoice INV-2026-00xx for $25 created automatically, the moment the appointment is booked.

[Voice: "Book Morgan Reyes for a Drop-in Class tomorrow at 2pm"]

Step 3: Go to Pay. Record the $25 payment.

→ Receipt REC-2026-00xx created automatically.

[Voice: "Record a payment of $25 for Morgan Reyes"]

Step 4: If needed, add a Discount / Return the same way as Step 7 in the Package example, linking it to this visit instead of a package.

[Voice: not yet supported — adding a Package or Direct-Booking discount by voice]

Step 5: Tap Make Official on the invoice and the receipt.

→ TINV-2026-00xx and TREC-2026-00xx created.

[Voice: not yet supported — making an existing document official by voice]

3.3 Case Example — Riley Chen, a Knee Rehabilitation treatment plan

Step 1: Add a new client called "Riley Chen."

[Voice: "Add a new client called Riley Chen, phone 71 456 789"]

Step 2: Go to Clients → Riley Chen → Cases. Type "Knee Rehabilitation" and tap Open a Case.

[Voice: "Open a case for Riley Chen called Knee Rehabilitation"]

The assistant will ask: “Are you sure you want to open a new case for Riley Chen called ‘Knee Rehabilitation’?” — say or tap yes to confirm.

Step 3: Inside the case, under Add Invoice: description "Initial Assessment", amount $80, tap Add Invoice.

[Voice: "Add an $80 invoice to Riley Chen's case for Initial Assessment"]

The assistant will then ask: “Would you like to register this invoice as an official document?”

Step 4: Under Add Payment: $50, tap Record Payment.

→ Balance now $30.

[Voice: "Record a payment of $50 for Riley Chen"]

Step 5: Two weeks later, add a second invoice: "6-Week Treatment Plan", $400.

→ Balance now $430.

[Voice: "Add a $400 invoice to Riley Chen's case for 6-Week Treatment Plan"]

Step 6: Riley’s insurance covers part of the cost. Under Add Credit Note: "Insurance covered portion", $100, tap Add Credit Note.

→ Balance now $330 (the credit note reduces what's owed, it doesn't add to it).

[Voice: "Add a $100 credit note to Riley Chen's case for insurance covered portion"]

Step 7: Record further payments as Riley pays over the following weeks — any amount, any time.

[Voice: "Record a payment of $100 for Riley Chen"]

If Riley also happened to have a regular package with a balance at the same time, the assistant won't guess which one a payment is for — it will ask you to specify.

Step 8: Book Riley's actual visits against the case, so they show up as real appointments.

[Voice: "Book Riley Chen for the knee rehabilitation case next Tuesday at 9am"]

Step 9: After the visit, go to Progress and write up what was done.

[Voice: "Log a progress note for Riley Chen: range of motion improved, continue exercises twice a week"]

Step 10: Tap Make Official on the Treatment Plan invoice and the Credit Note, whenever you're ready.

→ TINV-2026-00xx and TCN-2026-00xx created.

When these two were added by voice in Steps 5 and 6, the assistant would have already asked about official registration right then — this step is only needed if you said no at the time, or added them by tapping in the app instead.

4. Voice Command Quick Reference

You don't need to say anything word-for-word — the assistant understands natural phrasing. Here are a few real examples for every kind of command, to give you a feel for how to talk to it.

Reserve a package

“Reserve 10 sessions of PT 1 for Jordan Blake”

“Sign Sara up for 5 physio sessions at $40 each”

Book an appointment

“Book Jordan Blake for PT 1 tomorrow at 10am”

“Schedule Morgan for a Drop-in Class this Friday at 2pm”

Cancel an appointment

“Cancel Jordan's appointment tomorrow”

“Cancel Sara's session on Friday at 2pm”

Reschedule an appointment

“Move Jordan's Wednesday session to Thursday at 11am”

“Reschedule Riley's Tuesday appointment to next Monday, same time”

Record a payment (creates a receipt automatically)

“Record a payment of $150 for Jordan Blake”

“Sara just paid $25 in cash”

Add a new client

“Add a new client called Morgan Reyes, phone 71 345 678”

“New client, Taylor Kim, from Instagram”

Update a client's details

“Update Jordan's phone number to 71 999 888”

“Change Sara's site to Downtown Studio”

Log a progress note

“Log a progress note for Jordan: squat improved to 30kg”

“Add a note for Riley: range of motion improved, continue exercises”

Case actions

“Open a case for Riley Chen called Knee Rehabilitation”

“Add a $500 invoice to Riley's case for the root canal”

“Add a $30 credit note to Riley's case for a loyalty discount”

“Book Riley for the knee rehab case next Tuesday at 9am”

Navigate around the app

“Go to the Pay screen”

“Open client statistics”

Ask a question

“How many sessions does Jordan have left?”

“What's Sara's balance?”

A note on the Voice Assistant

Two things in this guide are marked as not yet supported by voice, and it's worth being upfront about exactly what they are:

- Adding a Discount / Return credit note to a Package or Direct-Booking sale — currently only possible by tapping through Book → Reserve Sessions. Voice can add a Credit Note to a Case, just not to a Package or Direct-Booking sale yet.
- Making an already-existing document official after the fact — voice can only offer this as a follow-up question immediately after it creates a new Case invoice, Credit Note, or receipt. There's no standalone “make this official” voice command for something created earlier or through the app itself.

Both are straightforward to add if wanted — just ask.