go flow

User Manual

Version v.26.06.28

Contents

Login

The login page is where you sign in to your go flow dashboard using your email address, your password, and a multi-factor authentication code.

Entering Your Credentials

Under the heading **Please enter your credentials**, enter the email address and password associated with your go flow account, then click **Continue**. A **Caution** notice then reminds you that, by logging in, go flow will store sensitive data in this device's browser cache — click **Continue** to proceed, or **Cancel** to clear the form.

If the details do not match an account, the message "Please check your credentials!" appears.

Multi-Factor Authentication

Every login is confirmed with a six-digit code. Depending on your account, you either enter the code from your authenticator app or receive it on your phone by SMS. Entering a wrong code shows "Wrong code!"; after several wrong attempts you are returned to the credentials step.

First-time setup

If multi-factor authentication has not yet been set up for your account, the **Set multifactor authentication** step appears instead. Scan the QR code with the authenticator app of your choice, or enter the key shown below the code into the app manually (the icon next to the key copies it). Then enter the six-digit code from the app to finish the setup and complete the login.

Selecting a Group

If your account belongs to more than one group, a **Please select group** step follows: pick the group you want to work in and click **Continue**. You can switch groups later on the Settings page.

Trouble Logging In?

Click **Trouble logging in?** on the credentials step and choose the option that applies:

- **I have forgotten my password**
- **I cannot access my Auth App**

Forgotten password

The **Password reset** step asks for your email address and your mobile number — **Continue** stays disabled until both are provided. An email with a reset password link is then sent to you; check your spam folder if it does not arrive within a few minutes.

Cannot access your authenticator app

The **Reset Multi-factor Authentication** step asks for your email and password. If they match an account, you receive an email with a link that resets your multi-factor authentication; you will then be asked to set it up again the next time you log in.

Troubleshooting

- Make sure your email address is spelled correctly.
- Passwords are case-sensitive.
- After too many failed attempts your account is locked for a short while. Wait a few minutes and try again.

Accepting an Invitation

When someone is invited to an organisation in go flow, they receive an email with a secure link. Opening that link shows this page.

Accept or decline

The page shows who sent the invitation and which organisation it is for. Choose:

- **Accept** — join the organisation.
- **Decline** — reject the invitation.

New users

If you do not yet have a go flow account, accepting the invitation continues to account setup, where you confirm your details and set a password. Existing users are simply added to the organisation.

Once accepted, you can sign in and start working in the organisation right away.

Setting Your Password

This page is used to set your login credentials — a new password and a Support Pin — when you first set up your account or after a password reset.

1. Confirm the SMS Code

If your account requires mobile verification, a six-digit code is sent to your phone by SMS ("We have sent you an SMS with a code, please enter it below."). Enter the code and click **Continue**. A wrong code shows "Wrong code!"; after five wrong entries you are taken back to the login page.

2. Choose a Password and Support Pin

The **Set credentials** step asks you to provide a new password and a support pin. As you type, a checklist shows which requirements are met:

- Length (at least 10 characters)
- Contains lower case
- Contains upper case
- Contains number
- Contains special character
- Support pin set (a four-digit number)

Continue stays disabled until every requirement is fulfilled.

3. Done

A confirmation step — **Password set** — tells you "Your password and pin have been updated!". Click **Continue to login** to return to the login page and sign in with your new credentials.

Reset MFA

The reset MFA page confirms a multi-factor authentication reset link sent to you by email.

Opening the Link

You reach this page by clicking the reset link in the MFA reset email. The page checks that the link is valid and shows a confirmation message; if the link is not valid, it tells you so.

Continuing to Login

Once the page is shown, use the **Continue to login** button to return to the login page and sign in.

Set up your organisation

This guide walks you through preparing a brand-new go flow organisation for day-to-day work. You will complete your organisation's profile, choose the languages it supports, define the custom fields your team records, switch on the modules you need — including Payments with your VAT rates — and decide whether you keep client records. Work through the steps in order — by the end your organisation will be ready for everyday use.

Open the Organisation page

From the **Configurations** menu, open **Organisation**. The page has three tabs — **Profile**, **Fields** and **Modules** — and opens on the **Profile** tab, where most of your initial setup happens.

Complete the Profile tab

On the **Profile** tab, fill in your organisation's core details: its **Name**, **Telephone** and **address**, and upload your **logo**. These details may appear on client-facing communications and booking pages, so enter them as you want clients to see them. See the Organisation Settings reference for a field-by-field breakdown.

Set the supported Languages

Still on the **Profile** tab, the **Attributes** table holds your organisation-wide settings, including **Languages**. The languages you choose control the interface language options available to your users and the languages used on booking templates and client communications. Pick every language you expect to serve clients in, so the right options are available later.

Define custom Fields

Open the **Fields** tab to shape the records your team works with. A selector switches between the three record types — **Client**, **Journal** and **Appointment** — and each list defines the fields shown when your team edits that kind of record. If you plan to capture anything beyond the standard contact details, such as consent flags or intake questions, set those fields up here before you start adding clients.

Switch on the modules you need

Open the **Modules** tab to switch on the features your organisation will use. Each feature has its own switch: **Record client data**, **Payments**, **Wallets**, **Vouchers**, **Products**, **Feedback forms**, **Treatments**, **Sessions**, **Aggregate resources**, **Emails**, **SMS**, **Video**, **Waitlist**, **Weather** and **Water temperature**.

Some modules depend on **Payments**: while Payments is off, **Wallets**, **Vouchers** and **Products** are locked and show a **Requires payments** hint. Turn on Payments first if you plan to use those features.

When a module has settings of its own, they appear directly beneath its switch. **Payments** reveals the **Saferpay** credentials for your online payment provider, **SMS** the **Twilio SMS** credentials, and **Video** the **Twilio Video** credentials — enter these when you connect online payments, text messages or video sessions.

Define your VAT Rates

The **VAT rates** setting sits in the settings table under the **Payments** switch on the **Modules** tab, and is shown while Payments is on. Once defined, these rates become available when you set prices for treatments, products, and other billable items, so it is worth getting them in place before you start pricing your catalogue.

Turn on Record client data

If you keep client records, make sure the **Record client data** switch at the top of the **Modules** tab is on. With it on, the **Clients** and **Journal** menus appear, giving you access to the Clients list and the Journal activity history. If your organisation does not keep client records, you can leave this switch off and those menus stay hidden.

Save your changes

When you have finished, use the **Save** button in the top bar to store everything. If you try to leave the page with unsaved edits, an unsaved-changes guard prompts you so you do not lose your work — save before you navigate away.

Your organisation is now ready for day-to-day work. From here you can move on to setting up your resources, treatments, and users.

Add your first client

This guide walks you through creating your very first client record from start to finish. By the end you will have a complete client with the right contact details, consent flags and tags, ready to be booked into the scheduler and messaged. For a fuller reference on the screens involved, see Clients and Client Detail.

Open the Clients directory

From the main menu, open **Clients**. This shows the member directory: a complete list of everyone already in your organisation. If this is a brand new organisation the list may be empty, which is exactly what you would expect before adding your first client.

Click Add to open the Client Detail dialog

At the top of the Clients page, click the **Add** button. The **Client Detail** dialog opens with a blank record, ready for you to fill in.

Enter the standard and custom fields

Start with the standard fields: **first name**, **last name**, **email** and **mobile number**. These are the built-in identity fields the platform relies on for booking and contacting the client.

Below the standard fields you may see additional **custom fields** that your organisation has defined. The set of fields shown is driven by your organisation's field definitions, so what you see is tailored to how your team works. Fill in whatever is relevant; you can always come back and complete the rest later.

Set consent and process flags

Set the **consent** and **process flags** so the record reflects what the client has agreed to. These flags matter for messaging and data handling, so it is worth getting them right the first time rather than guessing.

The dialog does not offer a way to upload a profile photo. If the record already has one — for example a picture the client added themselves through the online booking pages — it is shown at the top of the dialog, and you can remove it with the delete button beside it.

Add tags for later segmentation

Use the **tags** field to label the client in a way that helps you find and group people later. Tags power your filtering and segmentation, so a little structure here pays off when you want to message or report on a group of clients down the line.

Save the client

When the record is complete, click **Save**. The dialog closes and your new client appears in the **Clients** table straight away.

Confirm the client was created

To double-check, use the **search bar** at the top of the Clients page to look up the client by name, email or phone. You can also open the **advanced filter** to narrow the directory by a tag or another field you just set. Seeing the client in the results confirms the record was created and is ready to be booked and messaged.

Create a resource

A resource is the bookable unit clients actually reserve — a practitioner, a treatment room, or a piece of equipment. Nothing appears on your booking site until it belongs to a resource with a working schedule. This guide walks you from an empty editor to a saved, online resource with a full weekly availability schedule, using a worked example you can follow field by field.

Start a new resource

Open Resources and click the **+** (**Add**) button. It doesn't create anything directly — it opens a small menu asking which kind to make:

- **Resources** — a *standard* resource: a person, room, or asset booked for treatments. This is the common case and the one this guide covers.
- **Session** — a group session with a fixed slot length and capacity (needs the Sessions module). A session has no Availability tab; its slots come from its **Slot duration**, **Min capacity** and **Slot capacity**.
- **Aggregator** — a single listing that pools several standard resources so a client can book "whoever is free" (needs the Aggregates module). Instead of an Availability tab it has a **Resources** tab where you pick which resources it bundles and their priority order.

Choose **Resources** to open the full-screen editor on the **Profile** tab.

Fill in the Profile tab

Give the resource its identity. For our worked example we are adding a physiotherapist:

- **Title** — optional, e.g. `Dr.` (max 50 characters).
- **First name** — `Elena` (max 50).
- **Last name** — `Fischer` (max 50). This is the only name field that is required — you can't save without it.
- **Slug** — auto-fills to `elena-fischer` from the name. It's the last part of this resource's direct booking link, so you may want to shorten it to `elena`. Letters, numbers, hyphens and underscores only.
- **Color** — pick a colour (default blue) used for this resource's appointments in the scheduler.

Below the name row you can add per-language **Texts**, **Images**, an **Attributes** table (defaults such as max future booking days, cancellation rules, and — when Payments is on — a **VAT rate**), and **Tags**. Leave these at their defaults for now. At the top of the tab the status switch reads **Resource is offline**; leave it off while you finish the schedule.

Build the weekly schedule on the Availability tab

Open the **Availability** tab. It's a grid where each row is one rule: tick the weekdays it applies to (**Mo Tu We Th Fr Sa Su**), set **Starts at** and **Ends at** (times snap to 5-minute steps), choose the **Appointment types** (**Physical**, **Video**, or **Physical & Video**), and set the **Applicable from** / **to** dates. A brand-new rule defaults to Mon–Fri, 08:00–17:00, Physical, starting today.

To model a working day with a **lunch gap**, use two rules for the same days — the gap between them is simply not bookable. For Elena, working weekdays with an hour off at noon:

Rule 1 — morning - Days: **Mo Tu We Th Fr** ticked; Sa, Su clear - Starts at **09:00**, Ends at **12:00** - Appointment types: **Physical** - Applicable from: today (leave the far-future *to* date as-is for an open-ended schedule)

Click **+** to add a second rule:

Rule 2 — afternoon - Days: **Mo Tu We Th Fr** - Starts at **13:00**, Ends at **17:00** - Appointment types: **Physical & Video** - Applicable from: today

The result: bookable 09:00–12:00 and 13:00–17:00 on weekdays, with 12:00–13:00 closed. The resource's overall scope is taken from the union of its rules, so because Rule 2 allows video, Elena's page will show a physical/video toggle where video is offered.

Offer treatments

Open the **Treatments** tab and tick each treatment this resource performs. For every ticked treatment, the **Show duration** and **Show price** checkboxes control whether that treatment's card on the booking site displays its length and cost — for example, show duration on both a massage and a consultation, but show price only on the consultation. Drag to reorder how they list.

Save and see it on the booking site

Set the status switch to **Resource is online** and click **Save** in the toolbar. Closing without saving discards everything.

The resource now has a direct booking link at `<your booking URL>/<slug>` (e.g. `.../elena`), and it appears in the catalogue of any booking template whose **Resources** tab includes it. Clients pick the resource, choose a treatment, then see live slots computed from the availability rules you just built — with the lunch hour cleanly absent.

Standard resources need no extra module. Sessions require the Sessions module and aggregators require the Aggregates module. Price and VAT fields on a resource appear only when the Payments module is enabled for your organisation.

Create a treatment

A treatment is a bookable service — something a client can book that has a duration and, when you sell it, a price. It is one half of online booking: your resources say *who* is available, your treatments say *what* they can be booked for. This guide walks you from an empty editor to a live service, using one worked example: a 60-minute massage at CHF 120, offered both in person and over video.

Open the treatment editor

Go to Treatments and click **Add treatment** (the plus button). The editor opens full-screen with two tabs, **Treatment** and **Fields**. Everything below lives on the **Treatment** tab; the **Fields** tab is for checkout questions and comes last.

Set the status, name and slug

At the top is the online/offline switch. A new treatment starts **Offline**, meaning it is hidden from clients — leave it there until the rest is filled in, then flip it to **Online** to publish. Only online treatments can be booked.

Enter the **Name** (required, up to 50 characters). For our example, type `60-Minute Deep Tissue Massage`. Next to it is an optional **Slug**, the short code used in web links — it accepts only letters, digits, hyphens and underscores, up to 50 characters. Type `deep-tissue-60`, or leave it blank. You cannot save until both the **Name** and the **Duration** are filled in.

Choose the appointment types

Use the **Appointment types** toggle to say how the service is delivered: **Physical**, **Video**, or **Both**. For our massage, pick **Both** — it will be bookable in the studio or as a video consultation. This toggle is hidden for group organisations, which do not set a per-treatment scope.

When a treatment supports **Both**, the client sees a physical/video choice on the booking page; a Physical-only or Video-only treatment shows no choice.

Set the duration

Enter the **Duration** in minutes (minimum `1`). Type `60`. This is the block of time reserved in the scheduler whenever the treatment is booked — a 60-minute massage holds a 60-minute slot.

Note the cascade: changing the duration of a treatment that resources already offer flows through to every one of those resources — change it deliberately on a live service.

Add the price and VAT

The **Price**, **VAT rate** and **Price description** fields appear only when the **Payments** module is enabled for your organisation. If your organisation does not sell online, you will not see them at all, and you can skip to the next step.

With Payments on, enter a **Price** of `120` and pick the **VAT rate** from the toggle. The rates offered here are your organisation's own configured rates, shown as percentages — for a Swiss standard-rate service, choose `8.1%`. (For a new treatment, the first configured rate is pre-selected for you.)

Add descriptions, texts, images and tags

Two optional short labels (up to 50 characters each) sit alongside the numbers: a **Duration description** — set it to `Full body` — and, when Payments is on, a **Price description** — set it to `incl. consultation`. These display next to the raw figures on the booking page.

Below them, the multi-language **Texts** editor lets you write a description in each of your organisation's languages. Add a **profile** image and an optional **panorama** image, and any **Tags** you want for grouping and search (for example `massage`, `wellness`).

Add checkout fields, then save

Switch to the **Fields** tab if you want to collect extra information when this treatment is booked — tick **Use field** for each one and drag to order them. These come from your organisation's shared field catalogue.

Back in the toolbar, click **Save**. Closing the editor without saving discards everything. To remove an existing treatment later, tick **Delete item on save** before saving — it is soft-deleted, not erased.

Make it bookable

A treatment on its own is a menu item with no one to perform it. To put it in front of clients, open the resource who offers it, go to that resource's **Treatments** tab, and tick this treatment. There you also choose whether to **Show duration** and **Show price** on the booking card.

That completes the booking chain your customer walks in reverse: on the booking page they pick a **resource**, then the **treatment** it offers, then an available **slot**. Set the status to **Online**, link it to at least one resource, and your 60-minute massage is live.

Price and VAT fields require the Payments module; the appointment-type toggle is hidden for group organisations. Creating and editing treatments requires configuration write access.

Create a product

A **product** in go flow is a sellable extra your clients can add to their basket at checkout — a gift voucher, a wallet top-up, a punch card, or any custom item you offer alongside a booking. Products live on the Products page, and once one is online it shows up in the booking site's cart under the **add a product** prompt. This guide walks you through creating one from an empty dialog to a live product, with a worked example: a **CHF 100 gift voucher**.

Open the product dialog

Go to Products and click the **Add product** button — the plus icon at the top of the page (on mobile it lives in the speed-dial). The product dialog opens full-screen with two tabs, **Product** and **Fields**. A brand-new product starts **offline**, with a **fixed** amount type and your organisation's first configured VAT rate pre-filled, so you can build it in private before publishing.

Set the category and name

On the **Product** tab, start with the **Category** combobox. It offers two standard categories — **Wallets** (for wallet top-ups) and **Vouchers** (for redeemable voucher codes) — alongside any custom categories your other products already use. You can also type your own free-text category. For our example, pick **Vouchers**.

Next, give the product a **Name**. This is what clients see in the cart, so keep it clear — type `CHF 100 Gift Voucher`. **Name** and **Category** are the only two fields go flow requires: the **Save** button in the toolbar stays disabled until both are filled in and you have made a change.

Enter the price and VAT rate

Type the **Gross price** — the full amount the client pays. For the gift voucher, enter `100`.

Then pick the **VAT rate** from the toggle beside it. The rates shown come from your organisation's configuration (the default set is 8.1%, 2.5%, 3.7% and 0%), displayed as percentages. A gift voucher is typically sold VAT-neutral, so choose **0%** — the tax applies when the voucher is redeemed against a service, not when it is bought.

Choose fixed or flexible pricing

The **Amount type** selector decides how the price behaves:

- **Fixed** — the product always sells at the **Gross price** you entered. This is what we want for the CHF 100 voucher: every buyer pays exactly CHF 100.
- **Flexible** — the buyer chooses the amount themselves. Selecting **Flexible** reveals **Minimum amount** and **Maximum amount** fields, so you can set the bounds; switching back to **Fixed** clears them again.

Leave the gift voucher on **Fixed**.

> **A flexible example — the wallet top-up.** Create a second product with **Category** *Wallets*, **Name** `Wallet Top-up`, **Amount type** *Flexible*, **Minimum amount** `50` and **Maximum amount** `500`. At checkout the client sees an amount box instead of a set price, and can top up their wallet with anything from CHF 50 to CHF 500.

Add texts, images and tags

Below the pricing, three optional sections finish the presentation:

- **Texts** — the multi-language wording clients read, with a **Heading**, **Sub heading** and **Description** per organisation language. For the voucher, set the heading to "CHF 100 Gift Voucher" and the description to "The perfect gift — redeemable against any treatment."
- **Images** — an image list supporting **profile** and **session** image types.
- **Tags** — free-form tags for grouping and searching, e.g. `gift`.

Add checkout fields (optional)

Switch to the second tab, **Fields**, if you need to collect anything extra from the buyer — for a gift voucher, the recipient's name or a personal message. Tick **Use field** for each field you want and drag to order them. These custom **checkout fields** are asked only for this product.

Publish and save

Back on the **Product** tab, flip the status switch at the top from **Product is offline** to **Product is online** when you are ready for clients to buy it. Then click **Save** in the toolbar. The product now appears in the Products list — you can drag it by its handle to control the order products are shown in.

Where the customer sees it

Once online, your CHF 100 gift voucher appears in the booking site's cart. After a client reserves a slot, the cart shows an **add a product** prompt listing your online products; they tap to add the voucher, and it is billed together with their booking at checkout. The flexible wallet top-up appears the same way, but with an amount box the client fills in.

*Products are part of the Payments module: the **Products** switch only becomes available once Payments is enabled for your organisation, and editing products requires the config-write permission — without it, the Products page and this dialog open read-only.*

Schedule appointments and generate sessions

This guide walks you through both ends of the calendar: booking a single one-off appointment for a client, and bulk-generating a recurring series of group sessions across a date range. Generated sessions arrive as **Planned** and must be activated before clients can book them — this guide covers that step too, along with managing each session's roster: adding clients, marking no-shows, and messaging attendees.

Open the Scheduler and choose a view

Open the Scheduler, the main calendar where all appointments and sessions live. Use the view menu in the toolbar to switch between **Day**, **Work week**, **Week**, **Month** and **Agenda**. The day view shows a detailed timeline for one date, the week views spread several days side by side, the month view gives you the broadest overview, and the agenda view lists upcoming entries. Use the navigation controls to move to the date you want to work on before you start booking.

Book a single appointment

On a desktop browser, **double-click** an empty time slot in the grid to open the appointment editor — a single click only selects the cell. On a touch device a single tap is enough. In the editor, choose the **client**, the **resource** (the staff member the appointment belongs to), and the **treatment**. The slot you clicked sets the start time, and the treatment determines the duration — you can still adjust both before saving.

When you **Save**, the appointment appears in the calendar under its resource column. If you want the client to know about it, use the option to notify them on save so a confirmation message goes out automatically. You can pick the client straight from your existing Clients list, or add a new one on the fly.

Start a recurring series

For recurring group sessions rather than a single appointment, you have two ways in:

- **Open the Generate dialog.** Switch to the **Week** or **Work week** view, then click the **Generate** button in the scheduler toolbar. This is the route for creating a whole series at once.
- **Drag a session chip onto the grid.** Dropping the chip creates a single session directly at that spot — saved immediately in the **Planned** state, with the duration and capacity of the session resource. Use this for one-off extra sessions; no dialog opens.

Set up the Generate dialog

The Generate dialog creates many session appointments at once across the current view's date range, all sharing the same settings. Pick the **Session** at the top — if your organisation has only one session resource, it is selected for you automatically.

First set how the sessions behave, under **Visibility & bookability**:

- **Visibility** — controls who can see the sessions. Choosing **Restricted** lets you pick the **Eligible groups**.
- **Bookability** — controls when booking opens. Choosing **Bookable from date** reveals a date field, and if you also use Restricted visibility you can add early-access tiers that open booking earlier for selected groups, set in lead days.
- **Display** — controls how much session detail clients see.

Then build the schedule. Each schedule row defines a set of weekdays plus a start time:

- Tick the weekdays the session should run.
- Set the **Starts at** time. The session length comes from the session resource itself.
- Use the **Add** button to create more rows, and the delete icon to remove one.

If sessions already exist in the range, they are listed under **Existing appointments**. Select rows there to either **Delete selected** (sessions that already have booked clients are protected and cannot be deleted) or **Apply to selected**, which stamps the visibility and bookability settings you chose above onto the selected existing sessions.

Generate, then activate the planned sessions

Click the save icon to generate the series. Sessions are created for every matching weekday between the start and end dates of the current view; time slots that already have an appointment are skipped, so you can safely re-run the dialog to fill gaps without creating duplicates.

Generated sessions — and sessions dropped from a chip — appear in the calendar as **Planned**, drawn with a dashed outline. A planned session cannot be opened or booked yet. To take them live:

- Click the **(check)** button on an individual planned session to activate just that one, or use **Activate all** in the toolbar to activate every planned session at once.
- Click the **(X)** button on a planned session to discard it, or use **Remove all planned** to discard the whole staged batch.

Once activated, the sessions behave like any other appointment and become bookable.

Manage the roster

Open any active session from the calendar to reach its participants panel, where you manage the clients attached to it.

From here you can:

- **Add a client** — click the add-participant button to open the client picker, choose a client, and set how many slots they take.
- **Mark no-shows** — select participants and click **Mark no-show** to record that they did not attend. This is available only once the session has started and cannot be undone.
- **Message attendees** — select one or more participants and click **Message clients** to compose an email to them.
- **Cancel bookings** — select participants and click **Cancel selected**. With a single participant selected, a cancellation dialog opens for that booking so you can settle any refund. **Careful:** with more than one selected, the whole session is cancelled for everyone — including active participants you did not select — using shared cancellation settings.

To change the session's own capacity, visibility or to cancel it outright, open the Edit Session dialog from the session header. There you can raise or lower the **Capacity**, adjust the same visibility and bookability options used when generating, and cancel the session — with or without notifying the active participants first.

Set up online booking

Online booking is the heart of go flow: it turns a link or a QR code into a self-service storefront where your clients pick a time, pay, and confirm without ever picking up the phone. You shape that storefront by configuring a **booking template** in the dashboard. Each template publishes one public booking page, and the template's URL code is that page's address. Get a single template right and you have a live booking site — this guide walks you from an empty template all the way to a customer standing on your confirmation page.

Create a booking template

Open Templates and go to the **Bookings** tab, which lists every booking page you run — often one per location or service. Click the **+** (**Add template**) button to create a new one; it opens in the full-screen booking template editor. The one thing a template truly needs before it can be saved is a **Name**, so give it a clear one on the **Profile** tab. Everything on this tab describes a booking page, which sets it apart from the Branding and Messages templates that share the Templates page — those have no public address of their own.

Set the address and publish

Still on the **Profile** tab, the **Slug** is the memorable last part of your booking page's web address; the read-only **Public URL** above it updates as you type. That link is your storefront — <your booking URL>/<slug> — and go flow generates a **QR code** for it automatically, plus a second QR for video if this template offers video appointments. Nothing is live yet, though, until you flip the **Online** switch: it reads **Template is online** when published and **Template is offline** when hidden. While offline the URL simply won't open for clients, so leave it off until the rest is ready.

Choose what can be booked

Decide the shape of the offering with the template's **Scope** — physical appointments, video appointments, or both. Then open the **Resources** tab and tick which resources (and, for multi-location or group organisations, which sub-organisations) clients may book under this template. Ticking an organisation includes all of its resources; tick individual ones for a narrower page. Each resource also gets its own direct sub-link, <your booking URL>/<slug>/<resource code>, so you can point clients straight at one person or room. What you select here is exactly what appears in the customer's catalogue — see Resources for setting up the resources themselves.

Decide what to ask at checkout

The **Fields** tab controls which of your client fields are collected when someone checks out on *this* template. Tick **Use field** for each one you want and drag to set the order. Ask for what you genuinely need, because every field here is one the customer must complete before they can pay. The fields themselves are defined on the Templates page's Fields tab, covered in Fields.

Tailor the wording and look

Two tabs finish the presentation. The **Texts** tab holds the per-language wording clients read through the flow — Booking texts are always there, while Video and SMS variants appear only when your organisation has those enabled. The **Theme** tab sets colours, light or dark mode, the button and corner style, and the confirmation image shown at the end. Click **Save** in the toolbar when you are happy; closing the editor without saving discards your changes.

Put it in front of customers

With the template online, share its link or QR code wherever clients find you. You can also attach it from inside the app: on the Scheduler, a new appointment or session has a **Booking template** field — an autocomplete over your templates — and choosing one writes that template's URL code onto the appointment, tying that slot to the booking page.

What your customer sees

When a client opens the link or scans the QR, the storefront loads *this template's* configuration — theme, languages, and everything bookable. They arrive at either a full **calendar** of sessions or a simple **list**, depending on the page mode. They pick a session (then a weekly list of its slots) or a resource (then a treatment, then availability, with a physical/video toggle when Scope allows both). Reserving a slot holds it in a cart, where they can add products, vouchers, or a wallet top-up. They sign in with their email and a one-time code, fill in the checkout fields you chose, accept the terms, and pay through the payment provider — or complete instantly if credit or a voucher covers the whole amount. Finally they reach your confirmation page, with your image and a receipt or voucher to download. Every step is your configuration in action: **Online** decides whether they arrive at all, **Scope** and the **Resources** tab decide what is on offer, and the **Fields**, **Texts**, and **Theme** tabs decide what they are asked and how it all looks.

Online booking requires the Booking and Payments modules to be enabled for your organisation.

Online booking checkout (what your customers see)

Once a client has picked a time on your booking page, everything that follows — holding the slot, collecting details, taking payment, and confirming — runs on autopilot. This page walks you through exactly what your customer experiences, step by step, so you understand the flow well enough to support them and to make sense of a payment in your books. Every stage is shaped by settings you already control, and we call those out as we go.

The slot is held with a countdown

The moment a client reserves a slot it goes into their cart and a **hold** is placed on it in the backend, so nobody else can take it while they finish. A slim timer bar appears with a live countdown and the exact time the hold runs out. How long they get is your organisation's **reservation timeout** setting — **5 minutes by default**, and the same value drives both the on-screen timer and the backend hold, so they always agree.

If the timer reaches zero before checkout is complete, the hold is released automatically: the cart is emptied, the freed slot reappears in the calendar for the next person, and the client is sent back to the start with a short "reservation expired" message. There is nothing for you to clean up — an abandoned cart never leaves a slot stuck. The same thing happens if a client leaves a stale tab open and comes back much later.

While the hold is live, the client can add gift **vouchers**, other **products**, or a **wallet top-up** to the same cart, and apply a voucher code or their existing account credit against the total. Whether those extras appear at all is decided by your modules and by the per-session **Show vouchers** / **Show products** switches.

Signing in with email and a one-time code

Before anyone can reach the checkout form they must identify themselves. When the client taps **checkout**, a sign-in dialog asks for their **email address**, then sends a **one-time code** to that inbox (the code length is a tenant setting). They enter the code to verify, and only then does the flow let them continue — the checkout page is guarded, so a client who somehow lands there without signing in is bounced straight back to the cart. This is also what links the booking to the right client record: a returning customer's saved details and available credit are recognised, and a brand-new email quietly creates a new client for you.

Filling in the checkout details

The checkout form asks for the fields *you* chose. Critically, the client is asked for the **combined set** of fields from everything in the cart — the **checkout fields** configured on each booked session, plus those on any product in the cart, plus your organisation's tenant-wide fields — merged together and de-duplicated. So a client booking a treatment that asks for "Allergies" and also buying a voucher that asks for "Recipient name" sees a single form containing both. See Fields for how those selections are made.

A returning client's form is pre-filled from their profile; a guest's entries are remembered on their device in case they come back. One rule is enforced automatically: **when there is an amount to pay, the billing address (street, postcode, city) becomes required** even if you did not mark those fields required — Swiss receipts need it, and the backend insists on it too. Free or fully credit-covered bookings skip that. If you use a **consent** or **terms** field, it appears as a scroll-to-read agreement rather than a plain input, and a client who has already signed it is never asked twice.

Review, then pay — or confirm instantly

Most clients next see an **order summary**: their details, the booked items, the price breakdown with any voucher, credit and VAT lines, and a final total. (Some fast-track session types skip this review and go straight through — that is the per-session **skip review** option.)

What the confirm button does depends on the total:

- **Nothing left to pay** — the whole amount is covered by account credit and/or a voucher (or the booking is free). The button reads **confirm booking**, and tapping it books everything **immediately**, with no payment provider involved. Behind the scenes the order is activated on the spot, credit and voucher balances are drawn down, and the client goes straight to the confirmation page.
- **An amount is due** — the button reads **proceed to payment**, and the client is redirected out to the payment provider to pay.

The payment step and how it reconciles

When money is owed, the checkout submit reaches the backend, which records a pending **Payment** row against the order and opens a session with **Saferpay** (your card processor). The client is redirected to Saferpay's hosted page to enter card details. Nothing is booked yet at this point — the order sits in a *Created* state waiting on the outcome.

After paying, Saferpay redirects the client back to a confirmation URL carrying the order id and an outcome of **success**, **fail**, or **abort**. Here is the important part for reconciliation: **that outcome word in the URL is only a hint — it is never trusted.** On return, the app asks the backend to complete the payment, and the backend asks **Saferpay directly** what really happened. Only if Saferpay reports the transaction as **Captured** (the money actually taken) does the order get activated: the slot flips from held to a real booking, the payment is stamped as captured, the order is marked paid, and a receipt is produced. A client who tampered with the URL cannot fake a confirmation, and one whose card genuinely failed cannot be shown a false success.

Because a network hiccup or a closed browser tab can interrupt that redirect, there are two safety nets that make the order and the payment converge on their own:

- **Saferpay webhooks.** Saferpay independently notifies the backend of **Authorised** and **Captured** events. If a notification arrives while the order is still pending, it is logged for follow-up.
- **A reconciliation worker.** A background job periodically checks every still-pending payment against Saferpay. If Saferpay has the money but the order never finished (the classic "paid, then closed the tab" case), the worker **recovers** it — activating the booking automatically. If Saferpay reports no transaction and enough time has passed, the abandoned payment is safely cleared so the client can retry. Drift is written to your operations log, escalating in severity the longer it stays unresolved.

The practical upshot for you: **the money and the booking are reconciled from Saferpay's record, not from what the browser did.** A charged card will end up as a confirmed booking even if the customer's screen never showed it, and an uncharged one will never become a phantom booking. A **failed** or **aborted** payment leaves the order untouched and offers the client one **retry** back through Saferpay.

The confirmation page and receipt

On success the client lands on your **confirmation page** — your confirmation image, a thank-you, and a tidy list of every session (with its date, time and any per-session confirmation message) and every product they bought. A **receipt** PDF is generated for paid orders, and any purchased gift **voucher** gets its own code and PDF, all prepared just after the booking is activated. The cart is cleared, and reloading the confirmation later simply returns the client to the calendar rather than re-triggering anything.

Paid checkout requires the Booking and Payments (Orders) modules; vouchers, wallet credit and the "add a product" prompts each depend on their own module being enabled for your organisation.

Configure checkout fields

Every online booking ends the same way: your client fills in a short form before they pay. You decide what that form asks. It is a two-step idea — first you **define** a field once for your whole organisation, then you **select** that field on each thing that can be booked so it gets asked at checkout. This guide walks the create > place > checkout pipeline end to end, with a worked example you can follow tick for tick.

Define your fields on the Templates page

Open Templates and go to the **Fields** tab. This is your organisation's master list of custom fields — the place they are created, listed, and reordered. Pick **Client** in the entity selector (checkout fields are always client fields), then click **+** to add one. Each field opens in the field editor, covered in detail in Fields.

Worked example — a "Consent to SMS" field. Say you want written agreement before you text appointment reminders.

1. Set **Type** to **consent** and **Entity** to **Client**.
2. Give it an **Identifier** of `smsConsent` (letters only, five or more is best).
3. Fill in the **Heading** for each of your languages — this is the wording the client actually reads, e.g. *"I agree to receive appointment reminders by SMS."*
4. Enter a **Journal type** such as `marketing_consent` — consent and process fields require this.
5. Tick **Required** so it must be answered, and leave **Show in table** *off* so it does not clutter your client list.

Choosing **consent** automatically ticks **Show in profile**, and the field will always appear read-only in the dashboard — only the client can sign it, out on the booking page. Save, and it joins your master list.

A second field — "Allergies". Add another: **Type textbox**, **Identifier** `allergies`, a heading of *"Any allergies we should know about?"*, and leave it optional. A textbox defaults to a 50-character limit, which you can raise on the same screen. Save it too.

Select those fields at checkout

Defining a field does not, by itself, ask anyone anything. You now choose it on each bookable item. Open the booking template you set up in Set up online booking and go to its **Fields** tab (treatments, session resources, and products each have the same tab).

You will see your full client-field list with a **Use field** checkbox on each row, plus columns showing **Required**, **Self-managed**, **Scope**, and **Type**. Tick **Use field** for **Consent to SMS** and **Allergies**, then **drag** the rows to set the order the client sees them. Save. Behind the scenes this stores a simple ordered list of the fields you picked, so your booking page now knows to ask for exactly these two.

What the customer is actually asked

Here is the part worth understanding. At Online booking checkout, the form is **not** taken from a single template. The customer is asked for the **merged, de-duplicated set of fields from every item in their cart** — each session's fields, each product's fields, and your organisation-wide fields, combined in that order with duplicates removed.

So if a client books a massage (whose template asks for **Allergies** and **Consent to SMS**) *and* adds a gift voucher product (which asks for a **Recipient name**), the single checkout form they see contains all three fields once each — even though you configured them on unrelated screens. Ask only for what you genuinely need on each item; the cart does the assembling for you.

One field appears without you choosing it: whenever there is an amount to pay, a **billing address** becomes required. A free booking skips it.

That is the whole pipeline — define once on the Fields tab, select per item, and let checkout merge the result into the exact form your client fills in.

Create an order and take a payment

This guide walks you through the money side of go flow: creating an order by hand, understanding where payments come from, and confirming that transactions reach the Journal and your Analytics revenue. One thing to know up front: payments are produced by the online booking checkout — the dashboard has no button for taking a payment itself. What you *can* do is record orders manually and follow every payment through its lifecycle.

Open Orders and start a new order

Open the Orders page and click the **Add** button to open the order dialog. The dialog has two tabs — **Order** and **Order items**.

Fill in the Order tab

On the **Order** tab, pick the **Client** the order belongs to — an order cannot be saved without one. Then enter the order's figures directly: the **Gross total**, the **Discount total** and the **VAT total** are typed in as amounts; nothing is calculated for you. You can also set an **Order reference**, the **Currency**, a **Tag**, and select a discount code under **Discount** if one applies. The **Paid at** field records when the order was settled — set it yourself if you have taken payment outside the system.

Add order items

Switch to the **Order items** tab to break the order down into rows. Each row holds plain figures — **Quantity**, **Gross**, **Discount**, **VAT** and a **Tag** — which you fill in by hand; there is no product or treatment picker, and the rows do not feed the totals on the Order tab. Use the **Add** button for more rows and the delete icon to remove one. For your price lists themselves, see Products and Treatments.

Save the order and download the PDF

When the figures look right, click **Save** to store the order. It then appears in the Orders list, where each row has a PDF button — download the order document from there if the client needs a copy for their records.

Where payments come from

Payments are created automatically when clients pay through the online booking checkout — there is no way to record a payment manually in the dashboard, and the Payments page is a read-only history. If you settle an order off-system (cash, for example), the order's **Paid at** field is the place to note it.

Review payments

The Payments page shows one month of history at a time: use the month picker to move between months, up to five years back, and the search field and Excel export to work with the list. Each row shows the date, client, **Payment method**, **Order reference**, amount and a status chip — **Pending**, **Authorised**, **Captured**, **Failed** or **Refunded** — so you can see where each payment stands in its lifecycle.

Expand a row to see the payment's timeline — when it was authorised, captured, failed or refunded — along with its tags and notes. A payment links to its order reference; reconciliation against orders happens through that reference.

Confirm it lands in the Journal and Analytics

Finally, verify the transaction was recorded everywhere it should be. Open the Journal to find the payment in the chronological activity history, then open Analytics to confirm it is reflected in your revenue figures.

Orders, revenue figures and payment tracking require the Payments module to be enabled for your organisation.

Sell and redeem a voucher

This guide walks you through the full life of a gift voucher: issuing a single voucher (or a whole batch), setting its value and validity, and following it through to redemption. Redemption itself happens in the online booking checkout, where the client enters their code — from the dashboard you issue vouchers, track their remaining value, and correct their status when needed.

Open Vouchers

Open the Vouchers page from the menu. This page is available when the Vouchers module is switched on for your organisation. It lists every voucher you have issued, along with its original value, remaining value and status.

Create a single voucher

Click **Add** to open the New voucher dialog. Give the voucher a **Name** and, if you wish, assign it to a **Client** from your Clients list. Enter the **Original value** — the amount the voucher is worth at the point of sale — and choose its **Status**: **Available for sale**, **Redeemable**, **Redeemed**, or **Blocked**. You can also add tags and notes for your own bookkeeping.

Set validity and save

Set the **Valid from** and **Valid to** dates. These default to your organisation's standard voucher validity period, which you can adjust for this voucher. Click **Save** to issue it. The **Voucher code** is generated automatically and cannot be edited — it is the code the client enters when redeeming.

Produce a batch at once

When you need many vouchers — for a seasonal campaign or a printed gift-card run — use the Produce vouchers dialog instead of creating them one by one. Enter the **count** of vouchers to produce and a **Name** for the batch, then set the shared **Original value**, **Status**, and **Valid from** / **Valid to** dates that apply to every voucher in the batch. Each voucher still receives its own unique code. Vouchers produced together share a voucher group, shown as a coloured chip on the Vouchers page so you can identify each batch at a glance.

Track redemption

Back on the Vouchers page, use the status filter next to the search field to see where each voucher stands — **Available for sale**, **Redeemable**, **Redeemed**, or **Blocked**. The voucher-group chips let you isolate a single batch, which is handy for reconciling a campaign. The list shows the **Remaining value** for each voucher, so you can tell at a glance which are unused, partially spent, or fully redeemed.

Each row also has a PDF button that downloads the voucher document — useful when a client wants a printed gift card.

How redemption works

A voucher is redeemed in the **online booking checkout**: the client enters the voucher code when paying, and the voucher's remaining value covers part or all of the purchase. A partial redemption leaves a balance for next time, while a fully spent voucher ends up as **Redeemed**.

The dashboard offers no redeem action of its own, but you can correct voucher statuses manually: select one or more vouchers in the list, click the status button in the toolbar, and pick the new status — **Available for sale**, **Redeemable**, **Redeemed**, or **Blocked**. Use this to release a batch for sale, or to block a voucher that should no longer be accepted.

Run a promotion or discount code

This guide walks you through the three kinds of promotion go flow offers: an **announcement** banner your clients see on the booking pages, a **discount code** clients redeem at checkout, and **pricing promotions** that discount sessions automatically for early or last-minute bookings. All three live on one page, split across tabs.

Open the Promotions page

From the **Configurations** menu, open **Promotions**. The page has three tabs — **Announcements**, **Discounts** and **Pricing promotions** — one per kind of promotion.

Publish an announcement

The **Announcements** tab lists your banner announcements with their name, online state, icon and validity dates. Click **Add announcement** to open the **New announcement** dialog.

Give the announcement a **Name** (required) and use the online switch at the top — **Promotion is online** / **Promotion is offline** — to control whether it is published to clients. Set **Valid from** and **Valid until** to limit how long it shows; leave a date empty if you do not want a hard boundary on that side. Then shape how the banner looks: pick an **Icon**, write the translatable texts for each of your languages, choose the **Background color**, **Border color** and **Font color**, adjust the corner radius and border width, and optionally add an image. A live **Preview** at the bottom shows the banner exactly as clients will see it. Save with the save icon in the toolbar.

Create a discount code

Switch to the **Discounts** tab. Discount codes are edited directly in the table — each row saves on change, so there is no separate save step. Click **Add discount** to add a row, then fill it in:

- **Code** — what clients type at checkout. It is stored in capitals automatically.
- **Valid from** / **Valid until** — the window in which the code works. Outside it the code is not accepted, so you can prepare codes in advance.
- **Max uses** — how many times the code can be redeemed in total.
- **Max value** — an upper limit on the amount a single redemption can be worth.
- **Discount type** and **Discount value** — a percentage or a fixed amount.
- **Sessions** — which session offerings the code applies to. Leave empty to cover all of them.
- **Client groups** — restrict the code to selected member groups. Leave empty to let every client use it.

Clients redeem the code by entering it in the online booking checkout; the discount is applied to the covered sessions there.

Set up a pricing promotion

The **Pricing promotions** tab automates discounts around *when* a booking is made. At the top sit two text cards — **Early-bird** and **Last-minute** — where you write the **Header** and **Description** clients see alongside these offers, per language.

Below them, pricing rules are edited inline just like discounts — each row saves on change. Click **Add rule** and configure:

- **Type** — **Early-bird** (rewards booking well in advance) or **Last-minute** (fills seats shortly before start).

- **Lead** — the time window: days before start for early-bird, hours before start for last-minute.
- **Day and time windows** — **Always**, or **Custom** to open a grid where you limit the rule to particular weekdays and times.
- **Discount type** and **Discount value** — a percentage or a fixed amount.
- **Sessions** and **Client groups** — scope the rule the same way as a discount code; empty means it applies to all.

Matching bookings get the reduced price automatically in the online checkout — clients do not need a code.

Send an email or SMS to clients

This guide walks you through reaching your clients from go flow. Messages you write yourself are sent as **email** — either a one-off email composed from the Emails page, or an email to a session's participants started from the participant list. SMS is used by your **automated** messages (reminders and notifications), whose templates and branding are managed on the Templates page.

Compose a one-off email

Open the Emails page to see the history of everything sent from your organisation, then click the **Compose email** button (the email icon) to open the email composer. This button only appears if you have permission to edit clients, so if you can't see it, ask an administrator to grant that permission.

Add recipients, subject and body, then send

In the composer, click **Add recipient** to search for and select clients. Each one appears as a chip showing their name and email address; remove a recipient with the close icon on their chip, and add as many as you need. Enter a **Subject** line, then write the message in the formatting editor, which supports bold, italic and underline text, bullet and numbered lists, and links. Click the send button to deliver the email to every recipient. The button stays disabled until you have at least one recipient, a subject, and a body, and closing the dialog with unsaved changes asks you to confirm first.

Message a session's participants

To reach the people booked into a session, open the session's participant list, tick the participants you want to contact, and click **Message clients**. The same email composer opens with the selected participants already filled in as recipients — add a subject and body and send as usual. The message goes out as an email.

Note that the Clients page has no send-message action: selecting clients there feeds the Excel export only. To email several clients of your own choosing, use **Compose email** on the Emails page and add them as recipients.

Review delivery

Back on the Emails page, the history shows one month at a time — use the month picker to move between months, up to five years back. Each row shows the send date, type, subject, client, email address, who it was **Sent by**, and a status chip so you can confirm your message went out. The chip reads **Sent** when the email has been delivered, **Scheduled** when it is queued to be sent later, and **Pending** while it is still waiting to be processed. Expand a row to read the full body exactly as it was sent.

Brand your automated messages

The one-off emails above carry whatever you type, but your automated emails, SMS messages and printable documents follow saved templates. These are managed on the Templates page under the **Messages** and **Branding** tabs.

Open an **email** or **SMS** template from the **Messages** tab to edit the subject and content for each of your organisation's languages, inserting placeholders such as client or appointment details where needed. On the **Branding** tab, edit the header, footer and signature blocks that wrap your emails, and mark a header, footer or signature as your organisation default so new email templates start with your standard branding already selected. See Message & Branding Templates for the full detail.

Invite your team and assign roles

This guide walks you through adding your team members to go flow, composing the right access for each person, and sending them an invitation so they can set up their own login. You do everything from the Users page, so there is no separate onboarding tool to learn.

Open the Users page

Open the **Configurations** menu and choose **Users**. This page lists everyone who has access to your organisation, along with their current status. From here you can add people one at a time, import a whole team at once, and send invitations.

Add a team member

Click **Add user** to open the user dialog. Enter the person's **First name**, **Last name**, **Email** and **Mobile** number — all four are required before you can save. The email address is where their invitation will be sent and becomes the username they log in with, so make sure it is correct.

Compose roles and rights

There are no predefined roles to pick from — instead you compose each person's access from two sections in the user dialog:

- **User roles** — contact-role checkboxes: **Primary contact**, **Billing contact**, **Technical contact** and **Calendar resource**. Each carries a short description of what it means; Calendar resource marks the person as someone whose calendar can be booked.
- **User rights** — per-area access levels. For **Organisation**, **Configuration & settings**, **Users** and **Clients** you choose between **none**, **View** and **Manage**; **Analytics** offers none or View. Below these, a **Resources** list lets you set none, View or Manage per staff resource — or use the **All** entry to cover every resource at once.

Grant only what each person needs: someone who runs the calendar needs Manage on their resources, while a bookkeeper might need only View on Clients and Analytics. The Users reference page describes the permissions in more detail.

Save the user

Click **Save**. The new user appears in the list with the status **Created**. Created means the account exists but no invitation has gone out yet — that happens in the invitation step below.

Import several people at once

If you are onboarding a whole team, you do not need to add everyone by hand. Open the **Upload users** import from the Users page toolbar (on a phone or narrow window it is in the round **+** action menu). In the upload dialog:

1. Click **Download template** to get the CSV template. It has one column per field: FirstName, LastName, Email, CountryCode, Mobile, Tags and Create Calendar — all fields are mandatory, CountryCode and Mobile are numbers only, and tags are comma-separated. Setting Create Calendar to 1 also creates a bookable calendar resource for that person.

2. Fill in one row per person.
3. Click **Upload user list** and pick the file. The import runs immediately — there is no preview step — and reports either success or the first row that failed validation.

Every imported person is created with the **Created** status, exactly as if you had added them individually.

Send invitations

Adding a user does not give them access on its own — they still need an invitation. Select the users you want to invite and click **Send invitation**. A confirmation dialog titled **Send invitation to selected users** shows exactly who will be contacted; review the list and click **Send**. The selected users move to the **Pending acceptance** status.

Each person receives a secure link to accept the invitation and set their own password. Once they do, their status changes to **Active**. If someone misses or loses their invitation, simply select them again and re-send it at any time.

Scheduler

The scheduler is the main calendar view where you manage all appointments and sessions for your organisation.

Calendar Views

The calendar offers five views — **Day**, **Work week**, **Week**, **Month** and **Agenda** — chosen from the **View** menu in the toolbar. Use the arrow buttons to move backwards and forwards, and the date picker, which shows week numbers, to jump straight to a specific date.

In the Agenda view an additional **Fields** button lets you choose which client details (such as email or mobile) are listed for each participant.

Choosing Resources

When your organisation has more than one resource, the toolbar shows an avatar for each of them. Click an avatar to show or hide that resource's appointments; if there are too many to fit, the remainder are collected behind a "+N" button.

By default each column in the calendar is a day, and appointments from all selected resources share it. With at least two resources selected, **Group resources** splits each day into one column per resource; **Ungroup resources** merges them again. Grouping is available on desktop only.

Creating Appointments

Double-click an empty time slot to create a new appointment (on touch devices, a single tap). A dialog opens where you enter the appointment's details, and the appointment appears in the calendar once saved.

Moving and Resizing Appointments

On desktop you can reschedule an appointment directly on the calendar by dragging it. Drag-and-drop and resizing are **not available on touch devices** — on a phone or tablet, open the appointment and change its time in the edit dialog instead.

To move an appointment, drag it to a new time slot. When resources are grouped, dragging it into a different resource's column also reassigns it to that resource.

To resize an appointment, drag its bottom edge up or down. Resizing only changes the **end time** — the start time stays put, so this shortens or extends the appointment. Sessions cannot be resized (only moved), because a session's length comes from its capacity and slot settings rather than from the calendar block.

Before a move or resize is saved, you are asked to confirm with **Update appointment?**:

- **OK** applies the change immediately and saves it (syncing to the cloud right away when you are online — see *Working Offline* below). The client is **not** automatically notified of the new time, so let them know separately if the change affects them.
- **Cancel** reverts the appointment to its original slot and saves nothing.

Why some sessions move without asking. A session that has no live participants — no active bookings, reservations, arrivals or waitlist entries (only cancelled, expired or no-show rows, or none at all) — moves silently, with no confirmation. This is intentional, not a bug: with nobody booked in, there is nothing to disrupt, so the prompt is skipped. Every regular appointment, and every session that still has at least one live participant, always asks **Update appointment?** first.

For example: you drag a 30-minute haircut from 10:00 to 10:30 on the same stylist's column. A dialog asks *Update appointment?* — clicking OK moves and saves it, but the client is not automatically told. Drag a Yoga Class session that is 12/16 booked to a new time and the same confirmation appears, because it has live bookings — yet an empty, not-yet-booked Yoga Class slot moves instantly with no prompt.

Sessions in the Calendar

A session is a group slot with a fixed capacity that several clients can book. Its calendar entry shows the session name, the booked slots against the capacity (for example 5/12) and the time; pending reservations, pending acceptances and waitlist numbers are indicated on the entry too, and while a reservation is being held a countdown bar runs along it until the hold expires. Double-click an active session to open it for editing — see the Edit Session page.

Planned Sessions

Sessions created with the Generate dialog, or by dragging a session chip from the toolbar onto the calendar, start as **Planned**. Planned sessions are drawn with a dashed outline, cannot be opened, and cannot be booked by clients. Publish them with the tick on each entry, or **Activate all** in the toolbar to publish every planned session at once; the cross on an entry removes it, and **Remove all planned** discards all of them. The cross is also available on active sessions that have no bookings yet.

For organisations that use sessions, the toolbar shows a chip for each session on desktop: drag a chip onto an empty time slot to stage a planned session there.

Visibility and Bookability Badges

Entries with special visibility or bookability settings carry small badges — **Hidden**, **Private**, **Restricted**, **Not bookable** or **Bookable from date** (with the opening date) — matching the **Visibility & bookability** legend at the bottom of the calendar. Entries masked as coming soon appear dimmed until their opening date.

Occupancy Heatmap

The **Occupancy heatmap** button recolours every appointment by how full it is — from open to full — instead of by its resource colour, with an **Open > Full** legend at the bottom of the calendar.

"How full" is measured differently depending on the entry:

- **Sessions** use their real fill ratio: booked slots divided by capacity. A 12-capacity Group Swim with 3 bookings sits near the **Open** end of the gradient; the same session at 11/12 sits near **Full**.
- **Regular one-to-one appointments** have no partial fill — a single booked slot is, by definition, full — so they always render at the **Full** end of whichever scheme is active. In practice the gradient is only meaningful for sessions.

While the heatmap is on, hovering over the button offers a choice of three colour schemes:

- **Yellow > green** (the default) — open slots are yellow, full slots green.
- **Light > dark green** — lighter when open, darker as it fills.
- **Resource colour** — shades from a pale tint of the resource's own colour up to its full colour as bookings fill up.

Clicking the button again switches the heatmap off. Your heatmap choice (on/off and scheme) is remembered per user in this browser — it is not shared with other staff or carried to another device. Like grouping, the heatmap toggle is desktop-focused; the scheme picker appears on hover, so it is best used with a mouse.

Working Offline

The scheduler keeps working when your connection drops. Every change you make — creating, moving, resizing or cancelling an appointment, or generating sessions — is saved to the device **first** and never waits on the network, so the calendar stays responsive whether you are online or not.

The **cloud icon** in the top bar shows the sync state:

- **Green cloud with a tick** — everything is saved to the cloud.
- **Amber cloud with a small "!"** — you have local changes that have not yet synced.
- **Spinning icon** — a sync is in progress.
- **Offline** — the tooltip reads *Offline — not yet synced*, or *Offline — last synced . . .* with the time of the last successful sync.

Changes you make offline are queued and upload automatically the moment you reconnect. Sync also runs on its own roughly every 30 seconds, and you can force it at any time by **clicking the cloud icon**. If a sync fails partway through, your queued changes are kept and simply retried on the next attempt — nothing is silently lost.

The calendar caches roughly a two-week window (about two weeks back and forward) so you can browse recent and upcoming dates offline. Any unsynced edit is kept regardless of that window until it has successfully uploaded.

For example: your Wi-Fi drops mid-shift. You still drag three appointments to new times and create a new booking — each save succeeds locally and the cloud icon turns amber with a small "!". When the connection returns, within about 30 seconds (or immediately if you click the cloud icon) all four changes upload and the icon turns green.

Filtering by Status

Set status display lets you tick which appointment statuses are shown in the calendar.

Generating Sessions and Printing

For organisations with session resources the toolbar includes the **Generate** button, enabled only in the Week and Work week views — see the Generate Sessions page. The Generate button is desktop-only and is not shown on touch devices, so session batches must be created from a desktop browser (activating or removing planned sessions works fine on touch). The **Print** button prints the current calendar view.

Session visibility & bookability

Every session slot you generate carries visibility and bookability settings that decide **who sees the slot in your booking calendar, who can book it, and what they see before it opens**. This page explains what each setting means for the customer.

These settings live on **each generated slot**, not on the session type as a whole — that is why the Generate dialog offers **Apply to selected**, to stamp the same settings onto a batch of existing slots at once.

The four visibility levels

Set in both the Generate and Edit Session dialogs.

- **Public** — the default. The slot is listed in the booking calendar and bookable according to its bookability mode.
- **Hidden** — the slot is **removed from the booking calendar entirely**. The booking app never receives it. Use this for internal or offline sessions you still want on your own scheduler.
- **Private** — the slot is listed but **always locked**, shown with a padlock and a generic "by arrangement" card rather than the real session name. Customers cannot reach it through the public calendar at all. Instead, share the **direct join link** / **QR code** from the Edit Session dialog; the invited customer books against capacity after signing in. Use this for a slot reserved for one specific client or group.
- **Restricted** — the slot is **withheld from the booking app for everyone who is not eligible**. Eligible customers see the real session with a member-group icon and can book it; ineligible customers who somehow reach the listing see a locked **"Members only"** card with no name or price.

Bookability mode

- **Bookable now** — bookable immediately (default).
- **Not bookable** — visible but never bookable (for example, a session shown for information only).
- **Bookable from date** — reveals a **date field**. Before that date the slot is not bookable for the public; on and after it, the slot opens automatically. No operator action is needed at the open date.

"Coming soon" display mask

The display mode has two values: **Full details** (default) and **Coming soon**. A slot set to **Coming soon** with a future **Bookable from date** shows a generic **"Coming soon"** card — no session name, no price, no spot count. Once the date passes, the mask **resolves itself**: the real details appear and the slot becomes bookable, with no manual step. It is date-bounded and self-clearing.

Restricted eligibility and eligible groups

Organisation prerequisite: the eligible-groups and early-access controls only appear once your organisation has designated a **client field as the "group membership" field** (the `groupMembershipFieldProperty` setting). That field's options — for example a *Membership Tier* field with values *Bronze / Silver / Gold* — become the selectable groups. Until a field is designated, the Restricted controls show an info hint instead of the selector, and eligibility cannot be used at all. Configure the field first in your organisation settings.

With that in place, a **Restricted** slot exposes an **Eligible groups** selector. Only customers whose membership field puts them in a selected group can see and book the slot; everyone else is not shown it, or sees the locked "Members only" card.

Early ACCESS vs early-bird PRICE — not the same thing

Two different features share the word "early-bird". Keep them apart:

- **Early access** (this page) — lets an eligible sub-group **book ahead of the public open date**. It is a *visibility/timing* control that lives on the slot's Restricted settings.
- **Early-bird price** — a separate *pricing* feature in the booking calendar that offers a discounted price for a limited time. It has its own fields and badges.

Early access changes **when** a customer can book; early-bird price changes **what they pay**. A slot can use either, both, or neither.

Early-access tiers

Early-access tiers appear only when a slot is **Restricted** *and* **Bookable from date**. Each tier has **its own group list** (which can differ from the base eligible groups) and a **lead time in days** — an eligible tier member can book that many days before the public open date. New tiers default their lead to your organisation's configured default; you can add several tiers and remove any but the last. A tier with no groups is dropped on save.

To the customer, an early-access member sees the session as **fully bookable** while everyone else still sees the "Coming soon" mask — no action needed beyond being signed in as an eligible member.

Worked example

A gym has a client field **Membership Tier** designated as the group-membership field, with options **Bronze**, **Silver**, **Gold**. A popular class opens to the public on **1 September**. The operator configures one slot:

- **Visibility:** Restricted
- **Eligible groups:** Bronze, Silver, Gold
- **Bookability:** Bookable from 1 September
- **Display:** Coming soon
- **Early-access tier:** Gold members, 7-day lead

What each customer sees:

- **A Gold member** — sees the real class and can **book from 25 August** (7 days early); the early-access tier bypasses the mask for their group.
- **A Bronze or Silver member** — is eligible but has no early-access tier, so sees "Coming soon" until **1 September**, then books like the public.
- **A non-member** — the slot is withheld; if it surfaces they see a locked **"Members only"** card with no name or price, and can never book it.

How configuration reaches the customer

The dashboard stores these choices per slot, omitting anything left at its default. The booking calendar then enforces them per viewer: **Hidden** slots never reach it, **Private** and ineligible-**Restricted** slots are shown locked, and **Coming soon** slots stay masked until their date passes — while early-access members get the live, bookable card ahead of that date. Set it once per slot (or across a batch with **Apply to selected**) and the customer experience follows automatically.

Generate Sessions

The **Generate** dialog creates many session slots at once for one week, with shared visibility and bookability settings. Open it with the **Generate** button in the scheduler toolbar — it is available only in the Week and Work week views, and the sessions are generated for the week currently shown.

Choosing the Session

At the top, the **Session** selector sets which session the new slots belong to. If your organisation has only one session resource, it is already selected.

Visibility and Bookability

The **Visibility & bookability** section controls how the generated sessions appear in the booking calendar and when clients can book them:

- **Visibility** — Public, Hidden, Private or Restricted.
- **Bookability** — Bookable now, Not bookable, or Bookable from date. Choosing **Bookable from date** reveals a date field.
- **Display** — Full details or Coming soon (masked).

When visibility is **Restricted**, an **Eligible groups** selector appears where you choose which member groups may book. This requires a group membership field to be configured for your organisation — otherwise a hint is shown in its place. If you combine Restricted with **Bookable from date**, you can also add early-access tiers with **Add early-access tier**: each tier names its **Early-access groups** and an **Early-access lead (days)**, opening booking for those groups that many days before the general opening date.

Building the Schedule

Each schedule row defines a set of weekdays and a start time:

- Tick the weekdays the session should run.
- Set the **Starts at** time. The session length comes from the session resource.
- The add button creates another row, pre-filled to start where the previous row ends; the delete icon removes a row.

Rows whose times overlap on a shared weekday are rejected with an error when you save.

Sessions are generated for every matching weekday in the displayed week. Time slots that already contain a session are skipped; other appointments in the same slot do not prevent generation.

Existing Appointments

If sessions already exist in the displayed week, they are listed under **Existing appointments** with their date, time, state (**Planned** or **Active**) and visibility settings. Select rows to act on them in bulk:

- **Apply to selected** stamps the dialog's current visibility and bookability settings onto the selected sessions.
- **Delete selected** removes them. Sessions that already have participants are marked **Has participants** and cannot be deleted.

Saving

Click the save icon to generate the sessions. They are created as **Planned**: they appear in the calendar with a dashed outline but cannot be booked yet. Activate them in the scheduler — with the tick on each entry or **Activate all** in the toolbar — to make them bookable.

Edit Session

The Edit Session dialog lets you adjust a single session's capacity and visibility, manage its participants, and cancel the session.

Session Details

The header shows the session name, its date and time, and a status chip when the session is not active. You also see the current booking count against the session's capacity.

Capacity and Slots

For an active session you can adjust:

- **Slot capacity** — the total number of slots available. It cannot be set below the number already booked.
- **Booked slots** — the count of slots reserved outside the participant list.

The combined total is shown next to the capacity. Use the **QR code** button to display a booking link for the session.

Visibility and Bookability

The same visibility, bookability and display options used when generating sessions can be edited here for this one session, including eligible groups and early-access tiers for restricted sessions.

Participants

The participant list for the session is shown below the settings. From here you add, message, cancel and mark participants, as described on the Session Participants page.

Saving

Changes to capacity, booked slots and visibility are only applied when you click the save button in the toolbar; it becomes available once you have changed something. Participant changes, by contrast, take effect immediately.

Cancelling the Session

Click **Cancel Session** to cancel an active session. If active participants are attached, you are asked "This session has participants. Would you like to send a cancellation notification?":

- **No, just cancel** — cancel without notifying anyone.
- **Yes, send email** — compose an email to the active participants; the session is cancelled once it is sent.

A session that is already past or not active cannot be edited or cancelled.

Session Participants

The participant list manages the clients attached to a session: adding them, messaging them, marking attendance, and cancelling their bookings.

The Participant Table

Each row shows the participant's slot count, name, email, mobile, any consent or process fields, status, when the booking was created, and — for reservations that are still pending — a countdown in the **Expires** column. Double-click a row to open the full client record.

For sessions, the slot count inside the chip is editable: type a new number to change how many slots the participant takes, up to the session's remaining capacity. The change is saved immediately.

Adding a Participant

Click the add-participant button to open the **Select client** picker. Search for and choose a client and, for sessions, set the number of slots they take. You can also adjust the booking's notification emails — **Send confirmation to client**, **Send day-before reminder** and **Send morning reminder** — which are pre-set from the resource's defaults. Click **Add**; the new participant is added immediately.

Group Registration by QR Code

A participant who books more than one slot gets a QR icon next to their name. It opens a QR code and link that the remaining members of their group can use to register themselves for the session. Registrations that have been started but not completed appear as placeholder rows — **QR scan** for scanned registrations and *Pending completion* for reserved bookings awaiting completion, with their countdown in the Expires column. Completed group members are listed indented beneath the participant who booked the slots.

Messaging Participants

Select one or more participants and click **Message clients** to compose an email to them.

Marking No-Shows

Select participants and click **Mark no-show** to record that they did not attend. The button is only available once the session has started, and marking cannot be undone.

Cancelling Participants

Select participants and click **Cancel selected**:

- **One participant** opens the per-client cancel dialog, where you choose the refund destination and any cancellation fee. Only that participant's booking is cancelled.
- **Several participants** opens the bulk cancel dialog — be aware that confirming it cancels the **entire session**: every active participant is cancelled, including any you did not select, and the session dialog closes.

See the Cancel & Refund a Booking page for details on the refund options.

Cancel & Refund a Booking

When you cancel a booking, you decide where any payment is refunded and whether a cancellation fee applies. There are two flows: cancelling one client's booking, and cancelling the whole appointment or session with every attached client.

Cancelling for One Client

The **Cancel client** dialog shows the client and, if they have paid, the paid amount alongside the calculated refund.

- **Refund destination** — choose where the refund goes: **No refund**, **Refund to wallet**, **Refund to card** or **Refund as voucher**. The available options follow your organisation's refund policy.
- **Cancellation fee %** — a percentage withheld from the refund. It is pre-filled with the resource's default cancellation fee, and the field only appears once a destination other than **No refund** is selected. The refund amount updates automatically.
- **Reason** — a cancellation reason is required.

If the client has not paid, a note explains there is no payment to refund and **No refund** is the only destination. Click **Confirm cancellation** to complete.

Cancelling a Whole Appointment or Session

The **Cancel appointment** dialog appears when you cancel several participants at once. Confirming it cancels the appointment or session itself, together with **all** attached active clients — not only the ones you selected. A warning shows how many clients are affected and notes that cancellation emails are queued where the resource's settings allow.

- Set the **Refund destination** and **Cancellation fee %** (pre-filled from the resource) that apply to all clients. As in the single-client dialog, the fee field is hidden while **No refund** is selected.
- Enter a **Reason** (required).
- The **Attached clients** table lists each client with their paid amount and the refund they will receive.

Click **Confirm cancellation** to cancel. If some clients could not be processed, you are notified afterwards and can retry them individually from the participant list.

Journal

The journal is a chronological record of client-related activity across your organisation — appointments, notes, orders, payments, wallet movements, vouchers, and messages.

Overview

Events are listed newest first. Each row shows an icon for the event type, the date and time, the client, a description, and — where money is involved — an amount. Small tag and note icons at the end of a row indicate that tags or internal notes have been saved on that entry. The page reads live data from the server, so it is only available while you are online.

Event Types

Each entry carries an icon showing its type:

- **Appointments** — bookings, described with the resource and appointment details
- **Journal notes** — recorded note entries, shown with their note type
- **Orders** — orders, shown with the order reference
- **Payments** — payment transactions, with the payment method and provider
- **Wallet** — wallet credits and debits
- **Vouchers** — voucher events, shown with the voucher code
- **Messages** — messages sent to the client, with the channel they went out on

The Amount Column

For wallet events the amount appears as a credit in green with a plus sign or a debit in red with a minus sign. Other money events show the amount together with the currency where one is recorded.

Filtering by Month

The date control at the top is a month picker: the list always shows exactly one calendar month, and you can step back up to five years. To review a different period, pick its month and year.

Search

The search field (**Find entry**) finds entries by client name, description, and other entry details; results update shortly after you stop typing. Searching ignores the selected month — results are drawn from your organisation's entire history, not just the month on display.

Tags and Internal Notes

Every entry can carry tags and timestamped internal notes. Click the expand chevron at the end of a row to open them: edit the tags and append notes — each note is stored with the date, time, and the name of the user who wrote it. Click **Save** in the expanded panel to store your changes. Without the client-write permission the panel is read-only.

Excel Export

The **Export to Excel** button downloads the rows currently shown as a spreadsheet, including the client, resource, description, and amount details. The file is named with the current date, so successive exports do not overwrite each other.

Clients

The clients page is your member directory: a searchable, filterable list of everyone in the selected organisation, with full create and edit access from a single screen.

Overview

The page shows every active client in the organisation. Soft-deleted clients are excluded, so the list only ever contains current members. Across the top you have a search field, an advanced-filter button, an Excel export button, and an add button. On a phone these collapse into a single speed-dial that combines the filter, export, and add actions.

Searching

Type into the search field to find clients as you go. The search runs across name, email, and phone number as well as the other configured field columns, and it is debounced so the list updates a moment after you stop typing rather than on every keystroke.

Advanced Filtering

Click the filter button to open the advanced filter dialog and build a precise query across multiple fields at once. The filter button shows a small red badge whenever any filter is active, so you always know the list is narrowed.

The controls adapt to each field's type:

- **Checkbox, consent and process fields** become **Any** / **Yes** / **No** selectors.
- **Dropdown, radio and autocomplete fields** become multi-select chip lists of their options.
- **Tags** become a multi-select picker of all existing tags.
- **Text, email, number, textarea and mobile fields** become "contains" text filters.

The clear-all and apply actions stay disabled until you have set at least one filter. Clearing removes every condition at once.

Adding a New Client

Click the add (+) button to create a new client. Creating and editing clients requires the client-write permission; without it the page is read-only — you can open and view clients, but not change or save them. A new client opens the full client dialog, where you fill in the details and save to add the record to the list.

The Client Table

The list is rendered as a compact table. The first column is the client's avatar. When the Wallets module is enabled for the organisation, a **Wallet balance** column appears next, showing each client's saldo. After that come the configurable custom-field columns, drawn from the client field definitions and shown in their configured order. Double-click a row — or click the eye icon at the end of the row — to open that client.

Excel Export

Click the Excel export button to download the list as a spreadsheet. The export contains the rows you have selected, or — when any filter is active — the full filtered set rather than just what happens to be on screen. The file is named with the current date so successive exports don't overwrite each other.

Opening a Client (Details & Journal)

Opening a client (double-click, or the eye icon) shows the full-screen client dialog with two tabs:

- **Details** renders the ordered custom-field controls for the client. If the client has a profile image on file, it is shown at the top and can be removed — a new image cannot be uploaded here.
- **Journal** appears only when you open an existing client, never for a brand-new one. It is a searchable timeline of the client's history, with type icons for appointment, journal, order, payment, wallet, voucher and message events. Each row shows a formatted date, a description, and an amount column that renders wallet credit in green (+) or debit in red (-) or a currency amount, along with tag and note indicators and an expandable row of transaction metadata.

System administrators additionally get a raw-JSON toggle for inspecting the underlying record.

Client Detail

The client dialog is a full-screen editor for a single client, with a **Details** tab for their information and a **Journal** tab for their history.

The Details Tab

All of the client's fields are shown here and can be edited directly. Which fields exist depends on your organisation's client field definitions; common examples are name, email, and phone number.

The save button stays disabled until you have actually changed something, every required field is filled in, and there are no validation errors. Closing the dialog discards your edits — if there are unsaved changes, you are asked to confirm first. Without the client-write permission the dialog is read-only and the save button is not shown.

Profile Image

When the client has a profile image on file, it appears at the top of the Details tab with a delete button beside it. Deleting is the only image action available here — a new photo cannot be uploaded or replaced from this dialog.

The Journal Tab

For an existing client the dialog has a second tab, **Journal**, listing everything recorded for that client — appointments, journal notes, orders, payments, wallet movements, vouchers, and messages. Use the search field (**Find entry**) to filter the list. Each row shows the event-type icon, date, description, and amount; expand a row with the chevron to view and edit its tags and timestamped internal notes (read-only without the client-write permission).

The Journal tab does not appear while you are creating a new client.

Deleting a Client

At the bottom of the Details tab, the **Remove item on save** checkbox marks the client for deletion. Tick it and save, and the client is removed from the client list.

Raw Data (System Administrators)

System administrators see an extra toolbar button (**Raw Data**) that switches the dialog to a raw view of the underlying record for inspection and correction.

Message clients

Message clients lets you email the participants of an appointment or session straight from its participant list.

Where to Find It

Open an appointment or session in the scheduler and tick one or more participants in the participant list. A **Message clients** button appears above the list; it opens the email composer with the ticked participants already filled in as recipients.

Messages Are Sent as Email

Messages to clients go out as email — there is no separate SMS channel to choose from. The composer is the same one used for composing emails elsewhere: the recipients appear as chips (you can add more or remove any of them before sending), and you enter a subject and write the message body in the formatting editor.

Sending

Click the send button to send the email to all listed recipients. The button stays disabled until there is at least one recipient, a subject, and a message body. Sent emails appear in the history on the Emails page (when the Emails module is enabled).

Emails

The emails page shows the history of messages sent from your organisation and lets you compose new emails to clients. It is available when your organisation's Emails module is enabled.

Searching and Filtering

Use the search bar (**Search emails**) to find messages by subject, tags, or the client's name and email address; the sender is not searchable. The month picker next to it limits the list to a single calendar month so you can step back through earlier periods — but as soon as you type a search, the month is ignored and results are drawn from the entire history.

Reading a Message

Each row shows the send date, type, subject, recipient client, recipient email, who sent it, and a status chip. Click the expand chevron at the end of a row to read the full message body exactly as it was sent. Although the page is named Emails, text messages (SMS) sent by the system appear in the same list.

Status

The status chip shows where each message stands:

- **Sent** — the message has been sent.
- **Scheduled** — the message is queued to be sent later.
- **Pending** — the message is waiting to be processed.

Composing an Email

Click the **Compose email** button (the email icon) to open the compose dialog and write a new email to one or more clients. This button is only available if you have permission to edit clients.

Working Offline

The emails page reads live data from the server. When there is no connection it shows an offline message; the list returns automatically once you are back online.

Compose Email

The compose email dialog lets you write and send an email to one or more clients directly from the dashboard.

Adding Recipients

Click **Add recipient** to open the client picker (**Select client**). The picker adds one client at a time — click a name in the list to add it, then open the picker again for each further recipient. Each selected client appears as a chip showing their name and email address; remove a recipient by clicking the close icon on their chip. You can add as many recipients as you need.

Subject and Body

Enter a subject line, then write the email in the formatting editor. The editor supports bold, italic and underline text, bullet and numbered lists, and links.

Sending

Click the **Send** button to send the email to all selected recipients. The button stays disabled until you have at least one recipient, a subject, and a body. Closing the dialog with unsaved changes prompts you to confirm before discarding your work.

Analytics

The analytics page shows booking and revenue statistics for your organisation as sortable, filterable tables that you can export to Excel.

Overview

Viewing analytics requires the statistics permission, and the data is fetched live from the server.

Choosing the Period

The period is set with two month pickers, **Start date** and **End date** — whole months only, up to five years back. When the range is a single month, the bookings table lists individual appointments; over longer ranges the rows are aggregated into monthly totals per resource.

The Bookings and Revenue Tabs

When the Payments module is enabled the page has two tabs, **Bookings** and **Revenue**; without it, only the bookings table is shown.

Bookings

Each row shows the date, the resource, the number of booked places (**Actual**) against the available **Capacity**, and — when the Payments module is enabled — the **Revenue**. In the single-month view the rows are individual appointments and additionally show the **Duration**, the appointment **Status**, and when the booking was **Created**.

Revenue

The revenue table breaks income down by **Date**, **Source** (appointments or product sales), **Name**, **Quantity**, and **Amount**.

Filtering, Search and Sorting

Columns are sorted by clicking their headers. Some columns also carry a filter in the header: on the bookings table you can filter by resource (and by status in the single-month view); on the revenue table by source and name. The search field above the tables filters the visible rows as you type. Changing the period resets the filters.

Excel Export

The **Export to Excel** button downloads the currently shown tab — with any filters applied — as a spreadsheet named with the current date.

Online Connection Required

Analytics data is fetched directly from the server and is not available offline. If you are offline the page shows a message instead; the data loads again automatically once the connection returns.

Payments

The payments page is a read-only history of every payment transaction recorded for your organisation. Payment records are created automatically by the booking and checkout flow — you cannot create payments here, and the amount, payment method and status of a transaction can never be changed on this screen.

Overview

Payments are shown in a paged table, most recent first. Each row covers one transaction: when it happened, which client it belongs to, how it was paid, the linked order reference, the amount and its current status. The only thing you can change here is the tags and internal notes attached to a transaction (see Expanding a row).

Payment status lifecycle

The status shown in each row is a colour-coded chip that the page derives entirely from the transaction's lifecycle timestamps — it is never set by hand:

- **Pending** (grey) — the transaction exists but has not yet been authorised.
- **Authorised** (blue) — the payment has been authorised but not yet captured.
- **Captured** (green) — the funds have been captured. This is the normal completed state.
- **Failed** (red) — the payment failed.
- **Refunded** (orange) — the payment was refunded.

A refund takes precedence over every other state, then a failure, then a capture, then an authorisation; if none of those timestamps is present the transaction is shown as pending.

Columns

The table shows these columns:

- **Date** — the most relevant lifecycle moment for the row (captured, otherwise authorised, otherwise failed, otherwise refunded), shown with date and time.
- **Client** — the client the payment belongs to.
- **Payment method** — how the payment was made.
- **Order reference** — the reference of the linked order.
- **Amount** — the transaction amount, formatted in your currency and right-aligned.
- **Status** — the colour-coded status chip described above.

A trailing cell shows a small tag icon when the row has tags and a note icon when it has internal notes, so you can spot annotated transactions at a glance.

Searching and filtering

Use the search bar to find transactions. The search matches more than just the client's name: it also covers the client's email address, the order reference, the payment method and provider, the amount, and the text of any internal notes. The search runs automatically a moment after you stop typing.

Next to the search bar, the month/year picker restricts the list to a single calendar month. You can pick any month within the last five years up to the current month. The list always covers a whole month — there is no arbitrary date range or single-week selection.

Expanding a row (timeline, tags & notes)

Every row can be expanded to reveal more detail:

- A **timeline** table with four columns — Authorised at, Captured at, Failed at and Refunded at — each showing the exact date and time the step occurred, or left blank if it never happened.
- A **tags and internal notes** panel. You can add tags and post timestamped internal notes here (each note records who wrote it and when). Nothing is stored until you press the panel's **Save** button, which stays disabled until you have actually changed something.

These tags and notes are the only data you can change on the payments page.

Exporting to Excel

The Excel button above the table exports the rows currently shown to a spreadsheet — date, client, payment method, order reference, amount and status. The button is disabled while the list is empty.

Read-only and offline behaviour

Payment history is loaded live from the server in pages of 25 rows, with sorting handled server-side. Because the data is never cached locally, this page needs an internet connection: when you are offline it shows a message that a connection is required instead of the table. The list reloads automatically when you switch organisation. If the page failed to load because you were offline, it retries automatically as soon as a background sync completes — a sync that finishes while the list is already showing does not refresh it.

Orders

The orders page is a live, server-paged working surface for the orders recorded in your organisation. You can browse and filter orders, expand any order to read its line items, edit its tags and internal notes, download a per-order PDF, export the list to Excel, and create new orders.

Overview

Because this page shows live data rather than the offline cache, it needs a connection: when you are offline it shows a message asking you to go online instead of a stale list.

Finding and filtering orders

The top row holds the tools for narrowing the list:

- **Search** — a search field (placeholder “Find order”) that queries the server as you type, with a short debounce so it waits until you pause.
- **Month** / **year filter** — a month-and-year picker that defaults to the current month. You can go back up to five years; you cannot pick a month in the future.
- **Excel export** — exports the current list (see *Exporting to Excel*); disabled when the list is empty.
- **Add** — the primary “+” button that opens the order dialog (see *Creating and editing an order*). On a phone the Add and Excel actions are grouped inside a speed-dial.

Order columns

The list is a compact, server-paged table showing 25 orders per page, sorted by creation date (newest first). Its columns are:

- **Created** — the date and time the order was created, in your locale format.
- **Order reference** — the order’s reference.
- **Client** — the client’s name.
- **Discount total** — total discount, currency-formatted and right-aligned.
- **Gross total** — gross total, currency-formatted and right-aligned.
- **VAT total** — total VAT, currency-formatted and right-aligned.
- **Credit applied** — credit applied to the order, currency-formatted and right-aligned.

Amounts use your organisation’s currency. The trailing actions cell shows a small **tag** icon when the order has tags and a **note** icon when it has internal notes, plus a **PDF** icon for downloading the order (see *Downloading an order PDF*). Clicking a row does nothing on its own — use the expander chevron to open a row, and the “+” button to create a new order.

Creating and editing an order (OrderDialog)

The “+” Add button opens a fullscreen dialog with two tabs, **Order** and **Order items**. (System administrators also get a raw-JSON editor toggle.) Add is hidden for read-only users without edit permission.

The **Order** tab holds:

- **Active** / **inactive switch** — sets the order active or inactive.

- **Client** — an autocomplete limited to your organisation; selecting a client is required before you can save.
- **Order reference**.
- **Currency** — up to three characters.
- **Gross total** — a number.
- **Discount** — a promotion autocomplete shown by code; choosing one links the order to that promotion.
- **Discount total** — a number.
- **VAT total** — a number.
- **Paid at** — a date-and-time field.
- **Tag** — free text.

Saving requires a selected client and an actual change to the form; on save the order and its items are stored together and the page reloads.

Order line items

The **Order items** tab is a table with an Add ("+") button and inline-editable rows. Each row has editable **Quantity**, **Gross**, **Discount**, **VAT** and **Tag** columns plus a delete action. New rows start with a quantity of 1. Deleting a line item that was already saved soft-deletes it rather than dropping it outright.

Expanding an order: line-item breakdown, tags and notes

Expanding a row with its chevron lazily loads that order's items and shows them in a read-only inline table, sorted by category then description, with columns:

- **Category**
- **Description**
- **Quantity**
- **Discount** — currency-formatted.
- **Gross** — currency-formatted.

If the order has no items, a "no data" message is shown instead.

Below the line items is a metadata block where you can edit:

- **Tags** — a comma-separated list of tags.
- **Internal notes** — timestamped notes; each note shows its time, the author's name and the text, and you can add a new note from a field beneath them. These notes are saved on their own, separate from the order itself.

Downloading an order PDF

Each row's **PDF** icon downloads that order as a PDF. The file is named after the order reference (falling back to the order's id) — for example `<orderReference>.pdf`.

Exporting to Excel

The Excel button in the top row exports the current order list to a CSV/Excel file. It is disabled when the list is empty.

Permissions and availability

The orders page lives at **/orders** and requires the **Orders** module, which is available only when the **Payments** module is enabled. You need read permission for clients to view orders, and write permission for clients to add or edit them; without write permission the Add button is hidden and the page is read-only.

Wallets

Client wallets hold prepaid credit that clients can spend when booking and paying online. The wallets page is a read-only ledger of wallet transactions — every credit and debit that has affected a client's balance in your organisation. Entries are created automatically by the system; you cannot add funds, edit amounts or record transactions here.

Overview

Wallet entries are shown in a paged table of 25 rows, newest first, with sorting handled server-side. Each row is one transaction. The page does not show running balances — a client's current balance appears in the **Wallet balance** column on the Clients page.

Columns

- **Date** — the date and time of the entry.
- **Client** — the client whose wallet was affected.
- **Credit** — the amount added to the wallet, formatted in your currency and right-aligned.
- **Debit** — the amount taken from the wallet, formatted in your currency and right-aligned.
- **Event type** — a colour-coded chip describing what caused the entry (see below).

A trailing cell shows a small tag icon when the row has tags and a note icon when it has internal notes.

Event types

Each entry carries one of six colour-coded event types:

- **Top-up** (green) — credit added to the wallet.
- **Payment** (blue) — wallet credit applied to a purchase at checkout.
- **Refund** (orange) — credit returned to the wallet by a refund.
- **Voucher** (purple) — credit from a voucher redemption.
- **Expiry** (red) — credit removed because it expired.
- **Migration** (grey) — an entry created during a data migration.

Searching and filtering

Use the search field ("Find wallet entry") to narrow the list; the search runs automatically a moment after you stop typing.

Next to it, the month/year picker restricts the list to a single calendar month. You can pick any month within the last five years up to the current month.

Expanding a row (tags & notes)

Every row can be expanded to reveal a tags and internal notes panel. You can add tags and post timestamped internal notes (each note records who wrote it and when). Nothing is stored until you press the panel's **Save** button, which stays disabled until you have actually changed something. These tags and notes are the only data you can change on this page.

Exporting to Excel

The Excel button above the table exports the rows currently shown — date, client, credit, debit and event type. The button is disabled while the list is empty.

Online requirement

The ledger is loaded live from the server and is never cached locally, so this page needs an internet connection: when you are offline it shows a message that you need to be online instead of the table. The list reloads automatically when you switch organisation.

Vouchers

Vouchers are prepaid credit with a unique code. A client redeems a voucher by entering its code at checkout on your online booking site; the voucher's value is applied to the purchase. Each voucher tracks an **original value** and a **remaining value**, so it can be spent across several purchases. From this page you can issue single vouchers, produce whole batches, change statuses in bulk, download voucher PDFs and export the list to Excel.

Overview

The list is loaded live from the server in pages of 25 rows, sorted by creation date (newest first). Because it is never cached locally, the page needs an internet connection: when you are offline it shows a message that you need to be online instead of the table.

The voucher list

The table shows these columns: **Created**, **Client**, **Name**, **Voucher code**, **Original value**, **Remaining value**, **Valid to** and **Status**. Amounts are formatted in your organisation's currency.

Each row has a selection checkbox (for bulk status changes), an expander for tags and notes, and a trailing cell with a small tag icon when the row has tags, a note icon when it has internal notes, and a PDF button.

When several vouchers of the same batch are visible in the list, their names are shown as matching coloured chips so you can spot the batch at a glance.

Filtering and searching

The status filter next to the search field controls which vouchers are listed. **By default only redeemable vouchers are shown** — vouchers in any other status stay hidden until you add their status to the filter. The filter is a multi-select, so you can combine several statuses.

Use the search field ("Find voucher") to narrow the list; the search runs automatically a moment after you stop typing.

Voucher statuses

Each voucher carries one of four statuses, shown as a colour-coded chip:

- **Available for sale** (green)
- **Redeemable** (blue) — only vouchers in this status can be redeemed at checkout.
- **Redeemed** (grey) — set automatically when a voucher's remaining value reaches zero.
- **Blocked** (red) — a blocked voucher cannot be redeemed.

The **Valid to** date does not change a voucher's status: expiry is enforced at redemption, so an expired voucher is simply rejected when a client tries to use it and keeps whatever status it had.

Creating vouchers

Two toolbar buttons create vouchers (both require write permission for clients and an online connection; they are hidden for read-only users):

- The **+** button opens the **New voucher** dialog for issuing a single voucher.
- The factory button opens the **Produce vouchers** dialog for creating a whole batch at once.

Voucher codes are always generated automatically — they cannot be chosen or edited.

Changing status in bulk

Tick the checkboxes of one or more vouchers, then use the **Status** button next to the Excel button. It opens a menu with the four statuses; choosing one applies that status to every selected voucher. The button stays disabled until at least one voucher is selected.

PDF and Excel

- The **PDF** button on each row downloads that voucher as a PDF, named after the voucher's name and code.
- The **Excel** button exports the rows currently shown — created date, client, name, voucher code, original value, remaining value, valid-to date and status. It is disabled while the list is empty.

On a phone, the toolbar actions are grouped inside a speed-dial behind a single **+** button.

Tags and notes

Expand a row with its chevron to reveal a tags and internal notes panel. You can add tags and post timestamped internal notes (each note records who wrote it and when). Nothing is stored until you press the panel's **Save** button, which stays disabled until you have changed something.

Create a Voucher

This dialog lets you issue a single voucher for a client, set its value and validity, and choose its status.

Voucher Details

Give the voucher a **name** and, if you wish, assign it to a **client**. The **voucher code** is generated automatically and cannot be edited.

Value

Enter the **original value** of the voucher. As the voucher is used, the system tracks the remaining value separately, so you can always see how much is left. The original value must be greater than zero.

Status

Choose the voucher status: **Available for sale**, **Redeemable**, **Redeemed**, or **Blocked**. The status is preselected to **Redeemable**.

Validity Period

Set the **valid from** and **valid to** dates. **Valid from** defaults to today, and **valid to** defaults to your organisation's standard voucher validity period (365 days unless configured otherwise). The **valid to** date cannot be set earlier than **valid from**.

Tags and Notes

Add **tags** to help group and find vouchers, and use the **notes** field to record any additional information.

Click **Save** to issue the voucher. **Save** stays disabled until the voucher has a name and an original value greater than zero. This dialog is only available when the Vouchers module is enabled for your organisation.

Bulk-Produce Vouchers

This dialog produces a batch of vouchers at once, all sharing the same value, validity, and settings.

Batch Size and Name

Enter how many vouchers to produce in the **# count** field and give the batch a **name**. Each voucher in the batch is created with its own unique code.

Value

Set the **original value** that applies to every voucher in the batch.

Status

Choose the status for the produced vouchers: **Available for sale**, **Redeemable**, **Redeemed**, or **Blocked**. The status is preselected to **Redeemable**.

Validity Period

Set the **valid from** and **valid to** dates for the whole batch. **Valid from** defaults to today, and **valid to** defaults to your organisation's standard voucher validity period (365 days unless configured otherwise). The **valid to** date cannot be set earlier than **valid from**.

Tags and Notes

Add **tags** and **notes** that apply to every voucher in the batch.

Click **Save** to produce the batch. **Save** stays disabled until the count is at least 1, the batch has a name, and the original value is greater than zero.

Vouchers created together share a voucher group: on the Vouchers page each batch voucher's name is shown as a coloured chip, with a consistent colour per batch, so you can spot at a glance which vouchers were produced together.

Attributes

Across go flow you will meet small **Attributes** tables — on an organisation, on a resource, and on a booking template. This page explains what an attribute is, which things carry them, how you edit them, and — most usefully — how the attributes you set turn into what your clients see on the online booking site.

What an attribute is

An attribute is a single setting stored as a **key and a value** on an entity. Each table has one row per setting: the left column is the setting's name and the right column is where you change its value. The set of keys is fixed and defined by the application — you never invent new rows, you only edit the values of the rows that are there.

Because the keys are defined in code, each attribute also knows how it should be edited and what its starting value is. That is why the value column shows the right control for each setting: an on/off switch, a number box, a dropdown of fixed choices, a time-zone picker, a weekday picker, a country picker, or a plain text box. When an entity has never had a value saved for a row, the table shows that setting's built-in default. Some rows are **read-only** (greyed out) because they are managed elsewhere in the app.

Which entities carry attributes

Three kinds of thing have an Attributes table, each in a different place:

- **Organisation** — on the **Profile** tab of the organisation editor, and only for an individual organisation. A group container has no Attributes table of its own. See Organisation Settings.
- **Resource** — in the resource editor. A standard (provider) resource and a session resource show **different rows**, because they do different jobs. See Resources.
- **Booking template** — on the template's **Profile** tab. Templates have just four attributes. See Templates.

Settings that belong to a module — currency and VAT rates under **Payments**, voucher validity under **Vouchers**, and so on — do not appear in the organisation's main Attributes table. They live under their module switch on the **Modules** tab. Turning a module off **hides** its attribute rows but keeps their saved values, so switching the module back on restores everything exactly as it was.

Editing attributes

Open the entity, find its **Attributes** table, and change values in the right-hand column. Number boxes are clamped to a sensible range as you type — for example the OTP code length can only be set between 3 and 6. Nothing is written until you use the page's own **Save** button, which commits the whole editor together.

System administrators get one extra tool: a small `{ }` button above the table opens a raw JSON editor showing the underlying `{ key: value }` object directly. This is an escape hatch for support and setup work — it can edit even rows that are read-only for everyone else. Everyday admins should use the normal rows.

How attributes reach the booking site

This is the important part: **the attributes you set here are what shape your clients' booking experience.**

Each entity stores its attributes as a single block of settings in the database. When a client opens your booking page, the booking backend assembles a **tenant configuration** — a bundle of just the settings the public site needs — and sends it to the booking app. Only an approved list of keys is included: internal settings and every credential (SMS keys, payment keys) are stripped out and never reach the customer's browser. The booking app then reads those values to render the page.

A few of the settings a client actually feels:

- **Currency** and **country** — how prices and phone numbers are formatted on the page.
- **OTP code length** — the number of boxes in the login/verification code prompt when a client signs in to view or cancel a booking.
- **Booking UI mode** — whether the page shows a week/day **calendar** grid or a **simple** day-grouped session list.
- **Express booking** — whether this page offers the faster express checkout flow.
- **Favicon link** — the little icon shown in the browser tab of the booking page.
- **Slot price** and **cancellation fee** — what a client is charged for a session and what is deducted if they cancel.

Some values are re-checked on the server so platform rules always win. The OTP length is clamped to 3–6 regardless of what is stored, and — importantly — when the **Payments** module is off, **slot price, cancellation fee and VAT are forced to 0**, so bookings flow through as free. The stored numbers are kept; they are simply ignored until Payments is switched back on.

A worked example

Suppose you run a fitness studio and want a paid drop-in class.

1. On the organisation, set **Currency** to `CHF`.
2. On the class's session resource, set **Slot price** to `25` and **Cancellation fee** to `10`.
3. Make sure the **Payments** module is on.

A client opening that class on your booking site now sees the price shown as **CHF 25.00**. If they book and later cancel within the allowed window, the site shows a refund **minus the 10% fee**. Now turn the organisation's **Payments** module off: the very same class shows as **free (CHF 0.00)** with no fee, even though the `25` and `10` you entered are still saved — they simply wait, unused, until you turn Payments back on.

That round trip — a value you type on the dashboard, stored on the entity, filtered into the tenant config, and rendered on the public page — is how every customer-facing attribute works.

Organisation Settings

The organisation settings page is a three-tab editor for everything specific to one organisation: its public profile, its custom data fields, and its product modules together with their third-party credentials. All three tabs share a single Save button in the top toolbar — your edits across every tab are written together when you save.

Overview

The page opens from **Organisation** in the menu and edits whichever organisation you currently have selected — when your group is selected, you edit the group itself. A toolbar across the top holds the three tabs — **Profile**, **Fields** and **Modules** — and the green save button on the right. The save button stays disabled until you have an actual change to write, and saving pauses while a synchronisation is running; if you navigate away with unsaved edits, you are asked to confirm before they are discarded. System administrators also see a raw-JSON toggle in the toolbar for editing the underlying record directly.

When a group is being edited, the **Modules** tab shows only the integration credentials, because module switches are set per organisation rather than on the group.

Profile tab

The Profile tab holds the organisation's core details:

- **Name** — required, up to 20 characters.
- **Telephone** — entered with a country code.
- **Addresses** — the organisation's postal addresses, managed as a small list with add, edit and delete.

For individual (non-group) organisations the Profile tab also shows:

- **Texts** — short descriptive texts maintained per supported language.
- **Images** — uploads for the **logo**, **profile** and **pan** image types.
- **Attributes** — a table of the organisation's general settings, one row per setting — for example the languages your organisation supports, its time zone and its working days. Settings that belong to a specific module do not appear here: they are edited on the **Modules** tab underneath their module switch (currency and VAT rates, for instance, sit under **Payments**). This page does not set treatment or product prices.
- **Tags** — free-form tags for the organisation.
- **Delete item on save** — a checkbox that flags the organisation for deletion when you save. It is shown only where you have permission to delete the organisation.

Fields tab

The Fields tab lets you tailor the custom field definitions for this organisation, one entity at a time. A selector at the top chooses the entity — **Client**, **Journal** or **Appointment** — and the editor below edits that entity's field definitions for the organisation. Switching the selector loads the fields for the chosen entity.

Modules tab

The Modules tab turns product features on and off for this organisation. Directly beneath each switch sit that module's own settings: a small attribute table where the module has settings of its own, and a credentials section where it relies on a third-party service. For a group, only the credential sections are shown.

The switches are:

- **Record client data** — independent.
- **Payments** — the master switch for billing features. Turning it off also turns off the three dependent modules below.
- **Wallets**, **Vouchers**, **Products** — these require Payments; while Payments is off they are disabled and show a **Requires payments** hint.
- **Feedback forms**, **Treatments**, **Sessions**, **Aggregate resources**, **Emails**, **SMS**, **Video**, **Waitlist**, **Weather**, **Water temperature** — independent switches, each on or off on its own.

Module-specific settings appear as a small table under their switch while the module is on — for example currency and VAT rates under **Payments**, voucher validity under **Vouchers**, wallet credit expiry under **Wallets**, waitlist settings under **Waitlist**, location coordinates under **Weather** and the water-temperature settings under **Water temperature**. Turning a module off hides its settings and its related pages elsewhere in the dashboard; the stored values are kept and return when the module is switched back on.

Each credentials section also sits beneath its module switch and appears only while that module is on: **Saferpay** (**Customer ID**, **Terminal ID**, **API username**, **API password** with a show/hide toggle, and **URL**) under **Payments**; **Twilio SMS** (**Account SID**, **Auth token**, **Sender** and **From number** — digits only, up to 12) under **SMS**; **Twilio Video** (**Account SID**, **API key** and **API secret**) under **Video**.

When the current organisation is not a group and your group has more than one organisation, a **Use group integration settings** checkbox appears at the top of the tab — ticking it copies the SMS, video and payment credentials from the group and locks the credential fields, so all organisations share one set. Saving credential changes on the group passes them on to every organisation that uses the group settings.

Saving changes

Every tab feeds the one Save button in the toolbar, so a single save commits all your changes together. The button stays disabled until there is something to save, and turning on **Delete item on save** (Profile tab) marks the organisation as deleted when you save. If you try to leave the page with unsaved edits, you are prompted to discard them first. System administrators can switch the toolbar to a raw-JSON editor to view and edit the organisation record directly.

Organisation Detail

Organisation editor (same as the Organisation settings page)

This is the same editor you reach from the Organisation settings page. The fullscreen dialog and the **Organisation** page are two shells around one shared editor — the dialog opens on top of your work, while the routed page edits the organisation or group you currently have selected. Either way you are working with identical tabs and fields.

The dialog is opened from two places:

- From the **Organisations** list — use the eye icon to edit a sub-organisation in your group, or the clone action to copy one as a starting point for a new one.
- From the **Tenants** list (system administrators only) — to create or edit a tenant, either a group container or a single organisation. Tenant edits are saved online immediately rather than through the normal offline synchronisation.

The editor has three tabs: **Profile**, **Fields** and **Modules**. When you are editing a group or tenant container, the **Modules** tab shows only the integration credentials — module switches are set per organisation. A green **Save** button and a help button sit in the toolbar; pressing Escape or trying to leave with unsaved changes prompts you to confirm before discarding.

Profile

The Profile tab holds the organisation's identity and presentation:

- **Name** — required, up to 20 characters, with a live character counter.
- **Telephone** — entered with a country-code selector.
- **Addresses** — the organisation's postal addresses, kept as a list with add, edit and delete.

For a single organisation (not a group container), the Profile tab additionally shows:

- **Texts** — multi-language text blocks used in client-facing content. Which language rows appear is driven by the languages row in the Attributes table below.
- **Images** — upload a **logo**, **profile** image and **pan** (banner) image.
- **Attributes** — a table of the organisation's general settings, such as languages, time zone and working days. Settings owned by a module are not in this table — they are edited under that module's switch on the **Modules** tab (currency and VAT rates under **Payments**, for example).
- **Tags** — free-form tags for grouping and filtering.
- **Delete item on save** — a checkbox that marks the organisation for deletion when you save. It appears only when deletion is permitted and only for a non-group organisation.

Fields

The Fields tab edits the custom field definitions for each entity. Choose an entity at the top — **Client**, **Journal** or **Appointment** — and the editor below shows that entity's field definitions, which you can adjust per entity.

Modules

The Modules tab combines the service-module switches with each module's own settings and third-party credentials. When editing a group or tenant container, only the credentials are shown — module switches are set per organisation.

The available modules are:

- Record client data
- Payments
- Wallets
- Vouchers
- Products
- Feedback forms
- Treatments
- Sessions
- Aggregate resources
- Emails
- SMS
- Video
- Waitlist
- Weather
- Water temperature

Wallets, **Vouchers** and **Products** require **Payments**: they are disabled and forced off while Payments is off — turning Payments off cascades them off as well — and while disabled they show a **Requires payments** hint.

Where a module has settings of its own, they appear as a small attribute table directly beneath its switch while the module is on — currency and VAT rates under **Payments**, voucher validity under **Vouchers**, wallet credit expiry under **Wallets**, waitlist settings under **Waitlist**, location coordinates under **Weather**, and water-temperature settings under **Water temperature**. Values of a switched-off module are kept and reappear when it is switched back on.

Each integration sits directly beneath its module switch and is shown only while that module is on:

- **Saferpay** (under **Payments**) — **Customer ID**, **Terminal ID**, **API username**, **API password** (with show/hide) and **URL** for card payments.
- **Twilio SMS** (under **SMS**) — **Account SID**, **Auth token**, **Sender** and **From number** for outgoing text messages.
- **Twilio Video** (under **Video**) — **Account SID**, **API key** and **API secret** for video sessions.

A **Use group integration settings** checkbox at the top of the tab (shown for a single organisation in a group of more than one) copies the group's credentials down and locks the credential forms so the organisation inherits from its group.

Saving and permissions

The toolbar **Save** button stays disabled until you make a valid change — the editor compares against the original state and only enables saving once something has actually changed, the name is not empty and work days are present. Saving is also blocked while a synchronisation is in progress.

How changes are persisted depends on where you opened the editor:

- A **sub-organisation** edit is written to the local store and then synced.
- A **group** edit can propagate SMS, video and payment credentials down to the child organisations that use the group integration settings.
- A **tenant** edit (system administrators only) is saved online immediately.

System administrators also get a **raw-JSON editor** toggle in the toolbar, switching between the form and a direct JSON view of the organisation.

Users

The Users page lets you manage who has access to your go flow organisation, what they can see and do, and how they are invited. Adding a user and inviting them are two separate steps: a new user starts as **Created** and stays that way until you explicitly send the invitation.

Overview

The page shows everyone in the current organisation in a table. Across the top you have a **Find user** search box and the toolbar actions: **Export to Excel**, **Send invitation** and **Add user**. On a phone these actions live in a speed-dial that also offers **Upload users** for CSV import.

The users list (columns and statuses)

Each row shows one user, with these columns:

- **First name**
- **Last name**
- **Email**
- **Mobile**
- **Tags**
- **Status**
- an eye icon on the right that opens the user for editing

The **Status** column tells you where each user is in their lifecycle:

- **Created** — added but not yet invited.
- **Active** — has accepted and can sign in.
- **Suspended** / **User suspended** — access is blocked; **Set as active** in the user dialog restores it.
- **Pending email confirmation** — waiting for the user to confirm their email.
- **Pending mobile confirmation** — waiting for the user to confirm their mobile number.
- **Pending MFA confirmation** — waiting for multi-factor setup.
- **Pending acceptance** — invitation sent, waiting for the user to accept.
- **Remove invitation on save** — a sent invitation is being withdrawn.
- **User declined** — the user declined the invitation.
- **Remove user on save** — flagged for removal.

Searching and exporting

Type in the **Find user** box to filter the list as you type.

To export, select the rows you want and click **Export to Excel**. The action is only enabled once at least one row is selected, and it exports exactly the rows you have selected to a CSV file.

Adding a user (creates a pending user)

Click **Add user** to open the user dialog and create a new user. Fill in first name, last name, email and mobile, optionally add tags, and assign roles and rights (see Roles, rights and status changes).

Saving creates the user with status **Created** — **no invitation email is sent at this point**. The user remains pending until you send the invitation as a separate action (next section).

On a new user you can also use **Choose an existing group user** to link a person who already exists in another organisation of your group into this organisation, instead of creating a brand-new account.

Sending the invitation

Sending the invitation is a distinct action from adding a user:

1. Select one or more users in the list.
2. Click **Send invitation**.
3. In the **Send invitation to selected users** dialog, review each name and its current status, then click **Send**.

Only users whose status is **Created** or **Pending acceptance** can be invited. The action becomes available as soon as at least one selected user qualifies; any other selected users are simply left out — the confirmation dialog lists exactly who will receive an invitation. Sending moves those users to **Pending acceptance** and the invitation email goes out with the next synchronisation. To **re-send** an invitation, simply run **Send invitation** again on a user that is still at **Pending acceptance**.

For the dedicated flow, see Send invitation.

Importing users from CSV

To add several users at once, use **Upload users** (available from the speed-dial on mobile). Prepare a `.csv` file with these columns:

- **FirstName**
- **LastName**
- **Email**
- **CountryCode**
- **Mobile**
- **Tags**
- **CalendarResource**

The upload dialog offers a **Download template** button, which downloads a ready-made starting file with the correct column headings. Every valid row becomes a user with status **Created** — imported users are **not** auto-invited; you still send invitations as a separate step. See Upload users for the full import flow, including the exact validation rules.

Roles, rights and status changes

Open a user with the eye icon to edit them in the full-screen user dialog. First name, last name, email and mobile are mandatory; tags are optional. These identity fields can only be changed while the user is at **Created**, **Pending acceptance** or **Remove invitation on save** — for any other status they are locked and the dialog shows "These parameters can only be edited on newly created users." See User dialog for the complete dialog.

Status changes. The **Status** options depend on the user's current state — for example a Created user offers *Created* or *Remove user*; an Active user offers *Active*, *Suspend user* or *Remove user*; a user at Pending acceptance offers *Pending email confirmation*, *Revoke invitation* or *Remove user*; a suspended user offers *Set as active*. Choosing **Remove user** flags the account for removal.

Contact roles. Under **User roles**, tick any of **Primary contact**, **Billing contact**, **Technical contact** and **Calendar resource** to mark the user's role in the organisation.

Rights. Under **User rights**, set **View** or **Manage** access per area. At **Organisation level** this covers *Organisation*, *Configuration & settings*, *Users*, *Clients* and *Analytics* (view only); when your group has more than one organisation, a **Group level** (*Configuration & settings*) is also shown. You can grant **View** or **Manage** access per resource, with an **All** option to cover every resource at once.

You cannot change your own roles or rights — those controls are disabled for your own account.

User Detail

The user dialog is where you edit a single user: their details, their status, and what they are allowed to see and do in your organisation. It opens full-screen from the **Users** page — the eye icon on a row opens an existing user, **Add user** starts a new one. The **Save** button in the toolbar stays disabled until the details are complete and something has changed; closing the dialog discards unsaved edits.

User details

First name, **Last name**, **Email** and **Mobile** (entered with its country code) are all required before you can save; **Tags** are optional. The identity fields are editable only while the user is at **Created**, **Pending acceptance** or **Remove invitation on save** — for any other status they are shown read-only with the notice "These parameters can only be edited on newly created users."

For a new user, a **Choose an existing group user** picker appears when other organisations in your group already have users: pick a person there to bring the existing account into this organisation instead of creating a duplicate — their details are filled in for you.

Status

The **Status** dropdown offers only the changes that make sense from the user's current state. For example: a **Created** user offers *Remove user*; an **Active** user offers *Suspend user* or *Remove user*; a suspended user offers *Set as active* or *Remove user*; a user at **Pending acceptance** offers *Revoke invitation* or *Remove user*. Choosing **Remove user** flags the account for removal when you save.

There is no resend action in this dialog — invitations are sent (and re-sent) from the Users page by selecting rows and clicking **Send invitation**.

User roles

The **User roles** section holds contact-role checkboxes — **Primary contact**, **Billing contact**, **Technical contact** and **Calendar resource** — each with a short description beside it. Tick the ones that apply to this user.

User rights

The **User rights** section controls access level by level, with each area set to **none**, **View** or **Manage**:

- **Group level** — *Configuration & settings*. Shown when your group has more than one organisation.
- **Organisation level** — *Organisation*, *Configuration & settings*, *Users*, *Clients* and *Analytics* (view only).
- **Resources** — one entry per resource plus an **All** entry. Granting **All** covers every resource at once and resets the individual entries.

You cannot change your own roles or rights — these controls are disabled when you edit your own account.

Saving

Click the toolbar **Save** button to apply your changes; they are then synchronised. System administrators can also switch the dialog to a raw-JSON view of the user record via the toolbar toggle.

Importing from a File

Instead of adding users one by one, you can bulk-import them from a CSV file. Open the dialog with the **Upload users** button in the Users page toolbar (on a phone or narrow window it is in the round **+** action menu). This file-based import exists for users only — products and treatments are instead copied from another organisation in your group (see the last section).

1. Prepare the file

The file needs one row per user under these column headings:

- **FirstName** — required.
- **LastName** — required.
- **Email** — required, must be a valid email address.
- **CountryCode** — required, numbers only.
- **Mobile** — required, numbers only.
- **Tags** — optional; several tags are separated by commas.
- **CalendarResource** — set to 1 to also create a calendar (resource) record for the user; otherwise leave it empty.

The dialog's **Download template** button downloads a ready-made starting file with exactly these column headings and one blank row — fill in one row per user and save it as CSV.

2. Upload the file

Save your file in CSV format, click **Upload user list** and select it. Every row is checked before anything is imported.

3. Review the result

The import is all-or-nothing. If a row is invalid, the upload stops at the first problem, reports which line failed and why (for example "Upload failed - missing first name, line: 3"), and imports nothing — correct the file and upload it again. Once every row passes, all users are created together with status **Created**. Imported users are not invited automatically; send invitations as a separate step from the Users page.

Importing products and treatments

Products and treatments are not imported from a file. On the **Products** and **Treatments** pages, the **Import from another organisation** action opens a small dialog that asks **Please select from which organisation**. Choose another organisation of your group and click **Import items** to copy its items into the current organisation.

Sending Invitations

Invite users by email so they can set up their login and start using go flow. You can invite several users at once. Adding a user and inviting them are separate steps — nothing is sent until you do this.

Selecting users

On the **Users** page, select the users you want to invite and click **Send invitation**. Only users whose status is **Created** or **Pending acceptance** can be invited (or re-invited); the action becomes available as soon as at least one selected user qualifies, and any other selected users are simply left out.

Sending

The **Send invitation to selected users** dialog lists exactly who will receive an invitation, each with their current status. Review the list and click **Send**. Each listed user moves to **Pending acceptance**, and the invitation email itself goes out with the next synchronisation.

What the user receives

The invitation email contains a link where the user accepts (or declines) the invitation and completes their login details. Until they accept, their status stays **Pending acceptance** — you can re-send the invitation while it does. If they decline, their status shows **User declined**.

Resources

Resources are the bookable units of your organisation. Depending on which modules are enabled for you, the page shows up to three tabs:

- **Sessions** — group sessions with a fixed slot length and capacity (requires the Sessions module).
- **Resources** — standard resources such as staff members.
- **Aggregators** — entries that bundle several standard resources behind a single bookable listing (requires the Aggregates module).

Each tab has its own list. Click a row's eye icon to open the item in the editor.

The lists

Every list shows an avatar in the item's colour, the **Name**, a read-only **Online** checkbox, the **VAT rate** and **Tags** as chips. In addition:

- the **Resources** tab shows the **Appointment types** scope, the **Languages** and any current **Out-of-office** period;
- the **Sessions** tab shows the **Slot duration (minutes)**, **Min capacity**, **Slot capacity** and **Dependencies**;
- the **Aggregators** tab shows the **Appointment types** scope.

The columns are read-only. Settings such as the VAT rate are changed in the item's editor (its Attributes table), and a standard resource's working hours and availability on the editor's Availability tab.

Toolbar actions

- **Search** — the search field (placeholder **Find resource**, or **Find session** on the Sessions tab) filters the list by name. The search splits on spaces and matches every word.
- **Export to Excel** — tick one or more rows, then click the Excel button to export the selection to a spreadsheet. The button is enabled only when at least one row is selected.
- **Take selected resources offline** / **Set selected resources online** — change the online status of all ticked rows at once. A confirmation dialog lists the affected items before anything changes. On the Sessions tab the actions are labelled **Take selected sessions offline** / **Set selected sessions online**.
- **Clone selected resource** (or **Clone selected session**) — enabled when exactly one row is ticked. It opens the editor with a copy of the item, its name marked "[cloned]", ready to adjust and save as a new entry.

All actions except the export are hidden for read-only users. On mobile, the actions are grouped into a single speed-dial behind the plus button.

Adding a resource

The plus button (**Add**) does not create a resource directly — it opens a small menu asking which type to create: **Resources** (a standard resource), **Aggregator** (with the Aggregates module) or **Session** (with the Sessions module). Group organisations also get a **Link existing** option for linking a resource that already exists in the group. Choosing a type opens the editor with a new item.

Drag-and-drop ordering

Reorder rows by dragging them into your preferred sequence. The order is saved immediately and determines the order in which resources appear in the scheduler.

Resource Detail

The resource editor opens in fullscreen and is organised into tabs. The tab set depends on what you are editing:

- Standard resources: **Profile**, **Availability**, **Treatments**, **Fields**, **Integration** and **Out-of-office**.
- Aggregators: **Profile**, **Resources** and **Treatments**.
- Sessions: **Profile** and **Fields**.

Save with the save button in the toolbar. It stays disabled until something has been changed, the name is filled in and the slug is valid. System administrators also have a raw-data toggle for editing the underlying record as JSON.

Profile

The Profile tab holds the identity and general settings:

- **Status switch** — toggles the item between online (published and bookable) and offline (hidden).
- **Title**, **First name** and **Last name** for standard resources and aggregators; sessions have a single **Name** field instead. The name is required.
- **Slug** — the address fragment used on the booking site. It is suggested automatically from the name until you set it yourself, and may only contain letters, digits, hyphens and underscores.
- **Colour** — the colour used for this item in the scheduler.
- **Dependencies** — the standard resources this item depends on (shown for standard resources and sessions).
- **Texts** — the multi-language descriptions shown on the booking site.
- **Images** — a profile and a panorama image; sessions can additionally carry a session image and a video image.
- **Attributes** — a table of per-item settings, including the working day (start and end), booking limits, cancellation rules (the cancellation window is set in hours before the start), email notification toggles, how far ahead clients can book, and the VAT rate when the Payments module is enabled. Entries that belong to a module which is switched off for your organisation are hidden.
- **Tags** — free-form labels used for grouping and searching.
- **Delete item on save** — tick this and save to remove an existing item.

Aggregators additionally have a **Limit suggestions** toggle on this tab.

Availability (standard resources)

Availability is a table of rules rather than a per-day hours grid. Each rule has checkboxes for the weekdays it covers, a **Starts at** and **Ends at** time, an **Appointment types** scope (**Physical**, **Video** or **Physical & video**) and an **Applicable from** / **to** date range. Add rules with the plus button; when there is more than one rule you can delete rows or drag them into a different order. Together the rules determine when the resource can be booked, and the resource's overall appointment-type scope follows from them.

Treatments (standard resources and aggregators)

Tick the treatments this resource offers. Per treatment you can choose whether the booking site shows its duration (**Show duration**) and its price (**Show price**), and drag rows to control their order. The tab also has a **Default navigation to first treatment** switch.

Resources (aggregators)

An aggregator bundles several standard resources. Tick resources under **Available resources** to move them to **Selected resources**, and use the **Prio** value to control their order.

Fields (standard resources and sessions)

Configure the custom checkout fields collected when this item is booked.

Integration (standard resources)

Connect the resource to an external calendar so appointments stay in sync. See the Microsoft Exchange Calendar and Google Calendar help pages for the provider-specific steps.

Out-of-office (standard resources)

Plan an absence with a **Start date** and an **End date**, then turn the switch on — it can only be switched on once an end date is set. Optionally enable **Display message** and enter a **Message** (up to 200 characters) to show during the absence.

Microsoft Exchange Calendar

Connect a resource to a Microsoft Exchange mailbox so that appointments stay in sync between go flow and the resource's Exchange calendar.

Before you start

- Integrations can only be added to a resource that has already been saved. For a new resource, the Integration tab shows "You need to save the resource before you add an external account!" until you save it.
- Each calendar provider can be connected once per resource; once an Exchange account is connected, Exchange no longer appears in the add menu.
- The Exchange server must be Exchange 2016 or later.

Connecting an account

Open the resource's **Integration** tab, click the plus button and choose **exchange**. Enter:

- **Exchange URL** — the Exchange Web Services address of your mailbox, in the format `https://[your provider URL]/EWS/Exchange.asmx`.
- **Email** — the mailbox email address.
- **Password** — the mailbox password.

Click **Verify account** to check the credentials. If they cannot be verified, the dialog shows "Your entries could not be verified, please check!" — correct the entries and try again. On success the account is added to the resource's integration list; the password and URL are not shown again.

Sync settings

Once connected, the integration appears on the Integration tab with two controls:

- **Sync is on** / **Sync is off** — turn calendar synchronisation on or off. Syncing can take more than five minutes to start after switching it on, and up to 30 minutes to stop after switching it off. The first sync covers appointments from one week back onwards and can take up to ten minutes to complete.
- **Delete behaviour** — what happens in Exchange when an appointment is removed: **No action**, **Move to bin**, or **Delete Permanently**.

Removing the connection

Tick **Delete on save** on the integration and save the resource to disconnect the Exchange account.

Google Calendar

Connect a resource to a Google account so that appointments stay in sync between go flow and the resource's Google Calendar.

Before you start

Integrations can only be added to a resource that has already been saved. For a new resource, the Integration tab shows "You need to save the resource before you add an external account!" until you save it. Each calendar provider can be connected once per resource.

Connecting an account

1. Open the resource's **Integration** tab, click the plus button and choose **google**.
2. Enter the Google account's email address in the **Email** field and click **Authorize**.
3. A Google consent window opens — sign in and grant go flow access to the calendar.
4. After you consent, go flow is granted writer access to that calendar and the account is verified. If verification fails, the dialog reports "Could not verify Google account" — check the email address and try again.

Once verified, the calendar is linked to the resource.

Sync settings

After connecting, the integration appears on the Integration tab with two controls:

- **Sync is on** / **Sync is off** — turn calendar synchronisation on or off.
- **Delete behaviour** — what happens in Google Calendar when an appointment is removed: **No action**, **Move to bin**, or **Delete Permanently**.

Removing the connection

Tick **Delete on save** on the integration and save the resource to disconnect the Google account.

Treatments

Treatments are the services your organisation offers to clients, such as consultations, sessions, or procedures. The Treatments page shows a single flat list of the service catalogue for the organisation you currently have selected.

Overview

The list shows one row per treatment with an image avatar, the **Name**, an **Online** checkbox (read-only here), the **Appointment types** scope, the **Duration** in minutes, and **Tags** shown as chips. When the Payments module is enabled for the organisation, two extra columns appear: **Price** and the **VAT rate**. The trailing eye icon opens the treatment.

Adding a treatment

Click **Add treatment** (the plus button, hidden for read-only users) to open the treatment editor in fullscreen. The editor has two tabs, **Treatment** and **Fields**. On the Treatment tab you set the online/offline status, the **Name** (required, up to 50 characters), an optional **Slug**, the appointment-type scope, the **Duration**, the multi-language texts, images and tags. Name and Duration are required before the treatment can be saved.

Online / offline status

Each treatment has a published status, shown as the **Online** column in the list and controlled by the status switch at the top of the editor. **Online** means the treatment is published and bookable; **Offline** means it is hidden. Only online treatments can be booked.

Appointment types

The **Appointment types** column shows the scope of each treatment: **Physical**, **Video**, or **Physical & video**. You set this with the Physical / Video / Both toggle in the editor. The toggle is hidden for group organisations, which do not use a per-treatment scope.

Duration

Set the **Duration** in minutes (minimum 1). The duration determines the size of the time block reserved in the scheduler when an appointment is created for this treatment. Changing the duration of an existing treatment also updates the duration on any resources already linked to it.

Pricing and VAT (Payments module)

Price and VAT only apply when the **Payments** module is enabled for the organisation. When Payments is on, the editor shows a **Price** field and a **VAT rate** selector, and the list gains the matching **Price** and **VAT rate** columns. The available VAT rates come from the organisation's configured rates. On organisations without the Payments module there is no price or VAT at all.

Descriptions, images and tags

You can add optional free-text labels shown alongside the numbers: a **Duration description** and, when Payments is on, a **Price description**. The multi-language **Texts** editor lets you maintain descriptions in each of the organisation's configured languages. Each treatment can carry a **profile** image and a **panorama** image, plus free-form **Tags** used for grouping and searching, which appear as chips in the list.

Custom fields

The **Fields** tab configures custom checkout fields for the treatment — the additional information collected when this treatment is booked or checked out. System administrators also have a raw-JSON edit toggle for advanced editing.

Searching and exporting

Use the search field (placeholder **Find treatment**) to filter the list by name; the search splits on spaces and matches every word. Tick the checkboxes on one or more rows, then click the **Excel** button to export the selected treatments to a spreadsheet. The export button is enabled only when at least one row is selected. On mobile, the Excel, Import and Add actions are grouped into a speed-dial.

Import from another organisation

If you manage more than one organisation, the **Import treatments from another organisation** button (the import icon, or the speed-dial action on mobile) copies an entire treatment catalogue from another organisation into the current one. In the dialog, pick a source organisation from the list and click **Import items**. Every root treatment from that organisation — together with all of its multi-language texts — is copied into the current organisation, each as a new entry with its own identity. It is a bulk copy of the whole catalogue, not a per-item picker. Only non-group organisations other than the current one are offered as sources.

Editing and deleting

Click a row's eye icon to open the treatment in the editor. After making changes, save to mark the treatment for sync; status, duration and scope changes also cascade to the resources linked to it. To remove an existing treatment, tick **Delete item on save** before saving — this soft-deletes it rather than erasing it.

Treatment Detail

The treatment editor opens in fullscreen and has two tabs: **Treatment** and **Fields**. Save with the save button in the toolbar; it stays disabled until the **Name** and **Duration** are filled in and the slug is valid. System administrators also have a raw-data toggle for editing the underlying record as JSON.

Treatment tab

- **Status switch** — toggles between **Treatment online** (published and bookable) and **Treatment offline** (hidden).
- **Name** — required, up to 50 characters.
- **Slug** — the address fragment used on the booking site; it may only contain letters, digits, hyphens and underscores.
- **Appointment types** — a **Physical** / **Video** / **Both** toggle setting where the treatment can take place. The toggle is hidden for group organisations.
- **Duration** — the length in minutes (minimum 1). It determines the size of the time block reserved in the scheduler when an appointment is created for this treatment.
- **Duration description** — an optional free-text label shown alongside the duration.
- **Texts** — the multi-language descriptions shown on the booking site.
- **Images** — a profile and a panorama image.
- **Tags** — free-form labels used for grouping and searching.
- **Delete item on save** — tick this and save to remove an existing treatment.

Pricing (Payments module)

The **Price** field, the **VAT rate** selector and the **Price description** field only appear when the Payments module is enabled for your organisation — without it there is no pricing UI at all. The available VAT rates come from the organisation's configured rates.

Fields tab

The **Fields** tab configures the custom checkout fields for this treatment — the additional information collected when it is booked.

Products

The products page manages the sellable items of the currently selected organisation — wallet top-ups, vouchers, and any custom products you offer. Products are shown in a single, drag-reorderable list scoped to the organisation you have selected.

Overview

The list is a selectable table with one row per product. Each row shows its position number, an image thumbnail, **Category**, **Name**, an **Online** indicator, **Amount type**, **Gross price**, **Minimum amount**, **Maximum amount**, the **VAT rate** (shown as a percentage) and **Tags**. The eye icon at the end of a row opens the product in the product dialog for editing; the drag handle next to it reorders the list.

Editing requires the config-write permission. Without it, the page and the product dialog open in read-only mode.

Searching and exporting

The search box at the top filters the list as you type. It splits your text on spaces and keeps only products that match every term, so you can narrow the list with several words at once.

To export, tick the checkbox on the rows you want and use the **Export to Excel** button. Only the selected rows are written to the CSV/Excel file; the button stays disabled until at least one row is selected.

Adding a product

Use the **Add product** button (the plus icon; on mobile it sits in the speed-dial) to create a product. The product dialog opens fullscreen with two tabs — **Product** and **Fields**. A new product starts offline, with a fixed amount type and the organisation's first VAT rate pre-filled.

Save is only available once you have entered both a **Name** and a **Category** and made a change.

Online and offline status

Each product has a status switch at the top of the **Product** tab, shown as **Product is online** or **Product is offline**. Online publishes the product; offline hides it. The list shows this as a read-only **Online** checkbox column so you can see at a glance which products are published.

Category

The **Category** field is a combobox. It offers the two standard categories — **Wallets** (wallet top-ups) and **Vouchers** (redeemable voucher codes) — alongside any custom categories already in use, and you can type a new free-text category of your own.

Price, VAT and amount type (fixed vs flexible)

Enter the **Gross price** and pick the **VAT rate** from the toggle of rates configured for your organisation (shown as percentages).

The **Amount type** controls how the price behaves:

- **Fixed** — the product is sold at the gross price you entered.
- **Flexible** — the buyer chooses an amount within bounds. Selecting *Flexible* reveals **Minimum amount** and **Maximum amount** fields (useful for wallet top-ups). Switching back to *Fixed* clears those bounds.

Both the amount type and the bounds also appear as columns in the list.

Texts, images and tags

Below the pricing fields, the **Product** tab provides:

- **Texts** — a multi-language editor for the translated product wording, with a **Heading**, **Sub heading** and **Description** entry per organisation language.
- **Images** — an image list supporting *profile* and *session* image types.
- **Tags** — a free-form tag input for grouping and searching products.

Checkout fields

The dialog's second tab, **Fields**, defines custom **checkout fields** for the product. These are the additional fields collected from the buyer when the product is purchased.

Importing products from another organisation

If you belong to more than one organisation and have config-write rights, the **Import products from another organisation** button (the import icon) lets you copy products in from another organisation. A small dialog opens — titled **Import treatments from another organisation** — asking you to select which organisation to copy from; it offers every non-group organisation other than the current one.

Choose one and click **Import items** to copy every product from that organisation into the current one: each copied product is given a brand-new identity and its translated texts are copied across as well. This is a one-way copy, not a live link — the imported products become independent products of the current organisation, and later changes in the source organisation are not reflected.

Drag-and-drop ordering

Drag rows by the handle to arrange products in your preferred order. The new order is saved immediately and is reflected wherever products are shown to users or clients. Reordering is unavailable while a search filter is active — clear the search box first — and in read-only mode.

Deleting a product

To remove an existing product, open it and tick the **Delete item on save** checkbox on the **Product** tab, then save. This removes the product from the list.

Product Detail

The product dialog creates and edits a single product. It opens fullscreen from the products page — via **Add product** or the eye icon on a row — with two tabs: **Product** for the product itself and **Fields** for its checkout fields. Editing requires the config-write permission; without it the dialog opens read-only.

Overview

The save button in the top-right corner stays disabled until you have made a change and both **Name** and **Category** are filled in. Closing the dialog with the X discards unsaved changes.

Online and offline status

The switch at the top of the **Product** tab shows **Product is online** or **Product is offline**. Online publishes the product; offline hides it while keeping it in your list.

Category

The **Category** field is a combobox offering the two standard categories — **Wallets** and **Vouchers** — plus any custom categories already in use; you can also type a free-text category of your own. The category determines how the product behaves when purchased: a wallet product tops up the client's wallet balance, while a voucher product generates a redeemable voucher code.

Price, VAT and amount type

Enter the **Gross price** and pick the **VAT rate** from the toggle of rates configured for your organisation (shown as percentages).

The **Amount type** controls how the price behaves:

- **Fixed** — the product is sold at the gross price you entered.
- **Flexible** — the buyer chooses the amount. Selecting *Flexible* reveals **Minimum amount** and **Maximum amount** fields that bound the choice (useful for wallet top-ups). Switching back to *Fixed* clears the bounds.

Texts

The **Texts** editor holds the translated product wording — a **Heading**, **Sub heading** and **Description** entry for each of your organisation's languages. There is no separate description field elsewhere in the dialog; all client-facing product wording lives here.

Images

Upload one or more images for the product (*profile* and *session* image types). Images appear as the thumbnail in the product list and may be displayed on client-facing pages.

Tags

Tags is a free-form tag input used for grouping and finding products in the list.

Checkout fields

The **Fields** tab defines the product's custom **checkout fields** — the additional information collected from the buyer when the product is purchased.

Saving and deleting

Use the save button in the toolbar to apply your changes. On an existing product, tick **Delete item on save** at the bottom of the **Product** tab and save to remove the product from the list.

Promotions

The promotions page manages the promotional content of the selected organisation across three tabs: **Announcements** — styled banners shown on your public booking site; **Discounts** — codes clients enter at checkout for a price reduction; and **Pricing promotions** — automatic early-bird and last-minute pricing rules. Editing on any tab requires the config-write permission; without it the page is read-only.

Announcements

An announcement is a styled, time-limited banner shown to clients. It carries no discount configuration at all — it is purely informational; discount codes and pricing rules live on the other two tabs.

The tab lists your announcements with **Name**, **Online**, **Icon**, **Valid from** and **Valid until** columns, and the search box filters the list by name. Click **Add announcement** to create one, or the eye icon on a row to edit it — both open the announcement editor, where you set the banner's name, validity dates, icon, texts, colours and image. The editor is described on the Announcement banner help page.

Clients only see announcements that are online and within their validity dates.

Discounts

Discount codes give clients a percentage or fixed price reduction when they enter the code during online checkout. There is no editing dialog: the tab is an inline-editable table, and each row saves as soon as you change a field.

Each row has **Code**, **Valid from**, **Valid until**, **Max uses**, **Max value**, **Discount type**, **Discount value**, **Sessions** and **Client groups** columns. Click **Add discount** to add a row, and the delete icon at the end of a row to remove a code immediately. The columns are explained on the Discount codes help page.

Pricing promotions

Pricing promotions change the price automatically depending on when a booking is made — no code involved.

At the top of the tab, two cards — **Early-bird** and **Last-minute** — hold the **Header** and **Description** texts used to present each kind of offer to clients. They save when you leave the field.

Below is a table of pricing rules, edited inline like the discounts — each row saves on change. A rule consists of:

- **Type** — **Early-bird** or **Last-minute**. An early-bird rule rewards booking ahead: it applies when a session is booked at least the lead number of days before it starts, and the reduced price is applied automatically on the booking site. A last-minute rule is the mirror image, aimed at bookings made within the lead number of hours of the start.
- **Lead** — the number of days (early-bird) or hours (last-minute) that triggers the rule.
- **Day and time windows** — by default a rule applies **Always**. Click the button to open the **Day and time windows** dialog, a grid of weekdays and two-hour time blocks, and restrict the rule to particular days and times; pick the cells and use the dialog's save button. With windows set, the button in the table reads **Custom**.
- **Discount type** and **Discount value** — **% percent** or **Fixed**, and the size of the reduction.
- **Sessions** and **Client groups** — optional restrictions. Leave **Sessions** empty to cover all sessions, and **Client groups** empty to cover all clients; the group select is only available when your organisation has a group membership field configured.

Click **Add rule** to add a rule, and the delete icon to remove one immediately.

Announcement banner

An announcement is a styled, time-limited banner shown on your public booking site. The announcement editor opens from the **Announcements** tab of the promotions page — **Add announcement** opens it as **New announcement**, the eye icon on a row as **Edit announcement**. An announcement carries no discount; discount codes and pricing rules are managed on the other promotions tabs.

Status and validity

Use the status switch to set the announcement online (**Promotion is online**) or offline (**Promotion is offline**). Clients only see announcements that are online and within the **Valid from** / **Valid until** dates; leave a date empty to leave that side open.

Name

Give the announcement a **Name** for internal reference — at least 3 and up to 50 characters (the field shows a character counter).

Icon

Pick an optional **Icon** shown at the front of the banner. There are five choices: **Information**, **Warning**, **Discount**, **Event** and **Announcement**.

Texts

Enter the banner copy — **Heading**, **Sub heading** and **Description** — for each of your organisation's languages. Clients see the text in their own language.

Banner styling

The **Banner** section controls the look: pick the **Background color**, **Border color** and **Font color**, the corner rounding (**Button border radius** — none, Small, Medium, Large or Rounded) and the **Border width** (Small, Medium or Large). You can also add an image to make the banner stand out.

Preview

The **Preview** card shows the banner as it will appear — icon, colours, image and texts — and updates as you edit.

Saving and deleting

The save button in the top-right corner is enabled once you have made a change and the name is at least 3 characters long. On an existing announcement, tick **Delete item on save** and save to remove it.

Discount codes

Discount codes give clients a percentage or fixed price reduction when they enter the code during online checkout. Codes are managed on the promotions page, on the **Discounts** tab. There is no editing dialog: the tab is an inline-editable table, and each row saves as soon as you change a field.

Overview

Every code is one row in the table. **Add discount** adds a new row; fill in its fields directly in the table. There is no save button and no active/inactive switch — a code is live from the start, applies for as long as it is within its validity dates and limits, and the only lifecycle action is deleting it with the delete icon at the end of the row, which removes it immediately.

Editing requires the config-write permission; without it the table is read-only.

Code

Enter the **Code** clients will type at checkout. It is converted to capital letters automatically as you type.

Validity period

Valid from and **Valid until** bound when the code can be redeemed. Leave either date empty to leave that side open.

Usage limits

- **Max uses** — how many times the code can be redeemed in total. Once reached, the code stops applying.
- **Max value** — a cap on the total amount the code may deduct across all bookings. Once the total reaches the cap, the code stops applying.

Leave either field empty for no limit.

Discount type and value

Choose the **Discount type** — **% percent** or **Fixed** — and enter the **Discount value**: the percentage, or the fixed amount to deduct.

Restrictions

- **Sessions** — limit the code to specific sessions. When set, the discount only reduces those sessions in an order; when empty, the code applies to the whole order.
- **Client groups** — limit the code to clients in the selected groups; when empty, anyone can use it. This select is only available when your organisation has a group membership field configured.

Promotions in online booking (what your customers see)

You configure promotions in the dashboard on the Promotions page, but the payoff happens on your public booking site. The booking site renders each kind of promotion differently, and in different places — so it helps to know exactly what lands in front of a customer before you build one. This guide walks the customer's side of every promotion, with the icons and wording they actually see.

Announcement banners

An announcement shows up as a styled banner card at the top of the booking page. It leads with the icon you chose in the dashboard (information, warning, discount tag, event, or announcement), followed by your heading, sub-heading and description in the customer's language. If you set a background, border or font colour, the banner uses it; otherwise the text colour is picked automatically so it stays readable against your background. Add an image and the banner becomes a hero card, with a dark gradient laid over the picture so white text stays legible.

Banners are informational only — they carry no discount code, no price, and no dates. Every customer can dismiss a banner with its close (X) button, and once dismissed it stays gone for that browser and won't come back. If more than one announcement is live at once, they cycle in a swipeable carousel instead of stacking.

Banners appear at the top of the **calendar**, the **session/offers picker**, and the **simple session slot list**. They do **not** appear on the resource treatment picker or the resource-treatment slot list.

Early-bird price: the tag badge

Early-bird *pricing* rewards customers for booking ahead — the reduced price applies automatically, with no code to enter. On the **calendar**, a session that qualifies for an early-bird price gets a solid green disc badge with a **tag icon** (mdi-tag) tucked into its top-left corner, labelled *"Book early & save"*. That badge is the customer's cue that this slot is cheaper right now.

Open or hover that session and the discount is spelled out: the standard price is shown **struck through**, the lower early-bird price sits next to it in bold, and a green **"Save {amount}"** chip confirms the difference. When the early-bird price is due to rise, a nudge appears — *"Early-bird price until {date}. · then {amount}"* — showing when the current price ends and the higher price that follows. This same struck-price, bold-price, "Save" and "then" pattern shows in the calendar hover card, the session bottom sheet, and — with a tag-outline icon and an inline discounted-price chip — on the **simple session slot list**.

Early-bird PRICE vs early ACCESS

These two are easy to confuse and are completely separate.

- **Early-bird price** is about *money*: a slot is cheaper if booked far enough ahead. Its icon is the **tag** (mdi-tag / mdi-tag-outline), and its wording is *"Book early & save"* / *"Save {amount}"*.
- **Early access** is about *visibility*: a customer can book a slot ahead of the public opening, but it is not a discount. Its icon is a **star** (mdi-star-outline), labelled *"Early access"*, with the hint *"You can book ahead — opens to everyone on {date}."*

Because early access is a visibility rule rather than a price, it is covered under Session visibility & bookability.

Where early-bird pricing shows — and where it does not

Early-bird pricing surfaces on the **calendar** (tile badge and hover card), the **session bottom sheet**, and the **simple session slot list**. It does **not** appear on the **resource-treatment slot list**: that surface shows only the standard price, with no tag badge, no strike-through, and no chip. So a session priced at 400 kr with a 340 kr early-bird price shows the discount on the calendar and session list, but the very same offer reached through a resource shows only 400 kr. Plan for this — if a booking page is resource-treatment based, early-bird pricing is invisible to those customers. (Early access, by contrast, does show on the resource slot list.)

Applying a discount or voucher code

Here is the important caveat: the booking site has **no general "promo code" or "discount code" box**. The discount codes you set up on the Promotions page (Discount codes) are delivered to the booking site but are not entered by customers anywhere in this flow.

The one place a customer types a code is the **Voucher code** field on the **Cart** page — a separate gift-voucher system. It appears only when vouchers are enabled, there are session items in the cart, and a balance remains to pay. The customer types the code and taps apply; a valid voucher then shows as a row with its description, remaining balance, and the amount deducted. Customers who already hold vouchers on their profile can apply them with one-tap chips instead of typing. There is no code entry at checkout — the voucher field lives on the Cart page only, and it never applies a promotion discount code.

Announcement banners, early-bird pricing and discount codes are all configured on the dashboard Promotions page.

Templates

The Templates page gathers the reusable configuration for your organisation. It has four tabs: **Bookings**, **Branding**, **Messages** and **Fields**. Use the search field at the top to filter the current list.

Bookings

Booking templates control the online booking experience for your clients. Each row shows:

- **Online** — whether the booking page is currently published.
- **Name** — the template name.
- **Scope** — icons showing whether the template covers physical appointments, video appointments, or both.
- **URL** — the public link clients use to open the booking page.

Use the **+** button (**Add template**) to create a new booking template — for example one per location or service — and open a row (double-click, or the eye icon) to edit it.

New to online booking? Start with Set up online booking for the full walkthrough.

Branding

The Branding tab holds the building blocks for your emails: **Header**, **Footer** and **Signature** templates. Use the **+** button and pick the block type to create a new one.

The **Default** column marks one block of each type as your organisation default with a star; click **Set as default** on another row to change it. Email templates start with the default blocks preselected.

Messages

The Messages tab lists the templates behind your outgoing communications:

- **Email templates** — one for each automatic email the system sends (confirmation, reminders, cancellation and so on), plus the ad-hoc email used for manual messages.
- **SMS templates** — text message templates, shown only when SMS is set up for your organisation.
- **Document templates** — the receipt and voucher card documents, plus any custom PDF documents you add with the **+** button (**Add document**).

Fields

The Fields tab manages the custom fields captured on clients, journals and appointments. Choose the entity with the selector at the top (**Client**, **Journal** or **Appointment**) to see its fields.

Common settings can be changed directly in the list: the **Required**, **Sensitive**, **Self managed**, **Show in profile**, **Searchable** and **Show in table** checkboxes save immediately when ticked. Drag rows by the handle to change the display order — the new order is saved when you drop the row. Use the **+** button to add a field, or open a row to edit everything else.

Booking Template Detail

The booking template editor opens in full screen and controls everything about one online booking page. It is organised into five tabs: **Profile**, **Texts**, **Resources**, **Fields** and **Theme**.

See Set up online booking for the end-to-end guide.

Profile

The Profile tab holds the template's core settings:

- **Online switch** — publish or unpublish the booking page (**Template is online** / **Template is offline**). While offline, the booking URL is not available to clients.
- **Public URL** — the read-only full address of the booking page.
- **Name** — the template name (up to 50 characters).
- **Slug** — the editable last part of the booking page address. Adjust it to create a clean, memorable URL; the Public URL follows.
- **Organisation sort order** — shown when the template spans several organisations: list them for clients alphabetically (**Alphabetic**) or by distance (**Geo proximity**).
- **Images** — upload the template's confirmation image.
- **Attributes** — a table of additional template settings, including the booking email address, a favicon link, the booking page mode (calendar or simple) and express booking.
- **Delete item on save** — tick this and save to delete the template.

The right-hand side shows ready-to-use QR codes: one for the booking page, one for the video appointment page when the template covers video appointments, and — when several organisations are included — one per organisation.

Texts

The Texts tab holds the wording clients see, with a field for each of your organisation's languages. Booking texts are always available; **Video** and **SMS** text groups appear when video appointments or SMS are configured for your organisation.

Resources

Under **Included resources** you select which organisations and resources can be booked through this template. Ticking an organisation includes all of its resources; ticking individual resources includes just those (the organisation then shows a partial mark). Each resource row also shows its direct booking link. For group accounts, **Include all organisations and all resources** selects everything at once.

Fields

The Fields tab decides which of your client fields clients complete during this template's checkout. Tick **Use field** for each field to include, and drag rows to set the order. The list also shows each field's Required, Self managed, Scope and Type settings — those are edited on the Templates page's Fields tab.

Theme

The Theme tab styles the booking page:

- **Theme Settings** — choose which themes clients may use (**Light**, **Dark**, **System**) and which is the default, and set the button **Variant** (**Elevated** or **Outlined**) and the **Rounded** corner style, with a live preview.
- **Light Theme Colors** / **Dark Theme Colors** — colour pickers for every colour the booking page uses in each mode.
- **Icons** — override individual icons used on the booking page.
- **Reset to Defaults** — return all theme settings to the standard values.

Saving

Click **Save** in the toolbar to apply your changes; closing the editor discards them. A template needs a name before it can be saved.

Fields

Fields are the custom pieces of information you capture beyond the built-in ones — a client's allergies, a marketing consent, a note on an appointment. They live in one place and are reused everywhere: your client list, the client record, your booking pages and the customer's self-service profile all draw on the same definitions.

Keep two jobs separate. First you **define** a field once in the org-wide registry. Then, on a booking template, treatment, resource or product, you **choose** which of those fields to ask for at online-booking checkout. This page covers both.

Standard (built-in) fields

Alongside the custom fields you create, every organisation ships with a small set of **standard fields** that the platform depends on. They appear in the Fields registry like any other client field, but they carry fixed identifiers the rest of the system reads by name — so unlike a custom field, their identifier is not one you invent, and some are longer than the 20-letter limit the field editor imposes on new custom identifiers.

Core identity fields. These four client fields are required for online-booking checkout to work at all — the checkout rejects any submitted field that has no definition, hard-requires an email, and the booking-confirmation always reads the first name:

Identifier	Type	Label (EN)
`firstName`	textbox	First name
`lastName`	textbox	Last name
`email`	email	Email
`mobile`	mobile	Mobile number

Terms agreement. `agreeToTerms` (type **consent**) is a platform-standard field that drives the "accept terms and conditions" step at checkout: when it is in a flow's checkout fields, the customer is shown a terms checkbox and scroll-to-read dialog instead of a plain input, and a client who has already agreed is not asked again.

Other recognised profile fields. The booking app and checkout also understand a wider set of identity fields by name, so if you add them they behave as real profile data rather than free-text: `salutation`, `birthDate`, `addressLineOne`, `addressLineTwo`, `postalCode`, `city`, `country`, and `language`. A billing address (`addressLineOne` / `postalCode` / `city` / `country`) is required whenever checkout takes a payment. `language` is never shown as an input — it is submitted automatically from the client's profile or the current booking-page language.

You can reorder these, change their headings and hints, and choose whether to ask for them at checkout, just like any other field — but do not delete or rename the core identity fields, or checkout will stop working.

The Fields registry

The **Fields** tab on the Templates page is the master list of every field your organisation has defined. Pick the entity at the top — **Client**, **Journal** or **Appointment** — to see that entity's fields. A field belongs to exactly one entity: client fields describe a person, journal fields describe a journal entry, appointment fields describe a booking.

Use the **+** button to add a field, drag a row by its handle to reorder it (order controls where the field appears in lists and forms, and the new order saves when you drop the row), and open a row to edit it in full. Several common settings are editable straight from the list — **Required**, **Sensitive**, **Self managed**, **Show in profile**, **Searchable** and **Show in table** each save the moment you tick them.

Defining a field

Opening a field opens the full editor.

- **Entity** — Client, Journal or Appointment (fixed once chosen for a new field).
- **Type** — the input control. Choose from **textbox**, **textarea**, **number**, **date**, **dropdown**, **radio**, **autocomplete**, **checkbox**, **mobile**, **consent** and **process**. (You may also see existing **tags** fields, which display and filter normally, but tags cannot be picked when creating a new field.)
- **Identifier** — the field's internal name. It accepts **letters only** and is capped at 20 characters; anything else is stripped as you type. The editor nudges you toward at least five letters by flagging shorter identifiers, though a shorter one will still save. Clients never see this — it is the key the value is stored under.
- **Appointment types** — whether the field applies to **Physical** appointments, **Video** appointments, or **Both**.

Headings and hints

Every field needs a **Heading** for each of your organisation's languages — this is the label the client actually sees, and the field will not save until every language has one. A per-language **Hint** is optional and appears as helper text beneath the input.

Length

For **textbox** and **textarea** fields you can set a **Max input length** from 0 to 999. Choosing the type pre-fills a sensible default — 50 for a textbox, 500 for a textarea — which you can adjust.

Options

Dropdown, **autocomplete** and **radio** fields (and legacy **tags** fields) carry a list of selectable **Options**. Add options with **Add option**, drag to reorder, and give each a **Label** per language. At least one option needs a label in your default language before the field will save.

Each option keeps a stable internal identifier separate from its label, and that identifier — never the visible text — is what gets stored on the client record. So **relabelling an option is always safe**: renaming "Deutsch" to "German (Deutsch)", or fixing a typo, never rewrites or breaks answers clients already gave.

Visibility

A handful of independent flags decide where a field shows up:

- **Show in table** adds the field as a **column in your dashboard client list**, in the field's display order. Leave it off to keep the list compact.
- **Searchable** lets the field's contents be searched.
- **Sensitive** marks the field as holding sensitive data.
- **Show in profile** controls the **customer's self-service profile** in the booking app — a field with this on is one the client can view and edit themselves online. It has no effect inside the dashboard: the client record in the dashboard always shows every field defined for the entity, regardless of this flag.
- **Show timestamp** records when the field was last set.

Consent and process fields

Consent and **process** fields capture agreements — a marketing opt-in, a liability waiver, a disclaimer — rather than a plain value. They swap the **Sensitive** and **Searchable** options for a **Locked** option and add:

- **Journal type** — the key the agreement is recorded under (for example `marketing_consent` or `liability_waiver`). It is required.

- **Interval** — how often the agreement must be renewed: **once**, per **calendar year**, or every **90** / **180** / **365 days**.
- **Linked documents** — named links to documents the client should review, each with a name and a URL.

A **process** field additionally takes a per-language **Sub heading** and a rich-text **Content** block (with bold, italic, underline, headings, lists and links) shown to the client as the body of the agreement.

Choosing **process** pre-configures the field as required, locked, shown in profile, timestamped, and set to a calendar-year interval; choosing **consent** turns on Show in profile. Adjust any of these afterwards.

Consent and process fields can only be signed by the client. In the dashboard they appear on the client record as a read-only status — signed or unsigned, with the date when signed — so you can see where a client stands but cannot tick the box on their behalf.

Choosing fields for checkout

Defining a field does not, on its own, ask anyone for it. A booking **template**, a **treatment**, a standard or session **resource**, and a **product** each have their own **Fields** tab built from the same picker: tick **Use field** for each field that flow should collect, and drag to set the order. This produces the flow's **checkout fields** — the list asked for during online booking checkout. (Resource groups have no Fields tab; a group uses its members' own checkout fields.)

At checkout the customer is asked for the **combined** set of checkout fields from everything in their cart — every booked session plus every product — followed by your organisation's own tenant-level fields, with duplicates removed. So a client booking a treatment that asks for "Allergies" while also buying a voucher that asks for "Recipient name" sees a single form containing both, even though those were configured on two separate screens.

Consent and process fields behave differently here too: instead of a plain input, the client is shown the agreement to sign. Once signed it is not asked again, and a returning client is never re-prompted for something already on file. Separately, if a client has an upcoming booking whose checkout fields include a process agreement they have not yet signed, their booking-app profile prompts them to review and sign it.

For the bigger picture of standing up a booking page, see Set up online booking.

Message & Branding Templates

Message and branding templates control how your automated emails, SMS messages and printable documents look. They are managed on the **Templates** page, under the **Messages** and **Branding** tabs.

The lists show only what applies to your organisation: SMS templates appear once SMS is set up, and the receipt and voucher card documents appear while the corresponding modules (payments, vouchers) are enabled.

Creating Templates

The standard email and document templates are provided — you open and adjust them rather than create them. Two things can be added: on the **Messages** tab the **+** button (**Add document**) adds a custom PDF document, and on the **Branding** tab the **+** button opens a menu to create a new **Header**, **Footer** or **Signature**.

Email Templates

Open an email template from the **Messages** tab — every standard email type is always listed, so you can open and adjust one even before it has been customised. An email template combines a header, an optional signature and a footer with the message content for each of your organisation's languages.

- Choose a **Header**, **Signature** and **Footer** from your branding blocks; new templates start with your organisation defaults preselected.
- Switch between language tabs to enter the **Subject** and edit the content blocks for each language; a warning marks any language with missing required content.
- Attach documents per language where needed.
- A live **preview** on the right shows the assembled email with sample data.

The **Ad-hoc email** template is a special case: it only sets the header, signature and footer used when you compose an email manually. It has no language tabs, subject or content blocks — you enter the subject and message when writing the email.

SMS Templates

Open an SMS template from the **Messages** tab (SMS templates are listed only when SMS is set up for your organisation). Give the template a name, then switch between language tabs to write the message text for each language. Use the placeholder menu in the text field to insert dynamic values such as client or appointment details.

Document Templates (DOCX / PDF)

Document templates cover printable documents. The fixed set — the **receipt** and the **voucher card** — keeps its built-in name and is shown while the corresponding module is enabled. Custom PDF documents added with **Add document** also take a name of your own.

Open a document template, switch between language tabs and **upload** the file for each language, or **download** the current one.

Branding: Header Templates

Open a header template from the **Branding** tab. A header sits at the top of your emails and shows either your **organisation logo** (aligned left, centre or right) or a **banner image** that you upload and crop. You can also set the header background colour. A preview shows the result.

Branding: Footer Templates

Open a footer template from the **Branding** tab. A footer sits at the bottom of your emails. Set its background and text colours and the text alignment, then enter the footer text for each language. A preview shows the result.

Branding: Signature Templates

Open a signature template from the **Branding** tab. A signature is a single block of text per language that can be added to your emails. Give it a name and enter the signature text for each language.

Setting Defaults

On the Branding tab you can mark a header, footer or signature as your organisation default, so new email templates start with your standard branding already selected.

Feedback Forms

The feedback forms page lists the post-appointment surveys your organisation uses to collect responses from clients.

Overview

This page is available when the Feedback module is enabled for your organisation.

Searching

Use the search bar to find a form by name. Forms are listed alphabetically and show their scope, validity, an anonymous indicator, and the number of questions.

Creating and Editing Forms

Click the **Add** button to create a new feedback form, or double-click a row (or use the view icon) to open an existing one. The form editor lets you set the name, scope, validity dates, an anonymous option, and the questions clients will answer.

Scope

Each form is either organisation-wide or limited to specific resources. The scope column shows “organisation-wide” or the number of resources the form applies to.

Viewing Responses

Click the responses icon on a form to open its responses page, where you can browse and read the submissions collected for that form.

Feedback Form Editor

The feedback form editor lets you build and edit a single post-appointment survey.

Overview

The editor is organised into three tabs: **Settings**, **Questions**, and **Preview**.

Settings

On the Settings tab you define the form's basics:

- **Name** and **Texts** — the form title and description, with a field for each of your organisation's languages.
- **Images** — an optional feedback banner image shown with the survey.
- **Valid from** / **Valid until** — dates that limit when the form is active.
- **Send delay (days)** — how many days after the appointment the survey is sent (default 1, up to 365).
- **Cooldown per client (days)** — the minimum number of days before the same client can receive this form again (default 90, up to 3650). This stops frequent visitors from being surveyed after every visit.
- **Allow anonymous submissions** — when enabled, clients can submit responses without identifying themselves.
- **Resources in scope** — leave empty for an organisation-wide form, or select specific resources to limit the form to them.

Questions

On the Questions tab, add the questions clients will answer. Click **Add question** to add one, drag questions by the handle to reorder them, and remove a question with the delete icon. A new form starts with one ready-made rating question ("How was your visit?") that you can adapt.

Each question has:

- a **type** — **Rating (1–5)**, **NPS (0–10)**, **Free text**, **Yes / No**, **Single choice** or **Multiple choice**;
- a **Question** heading and an optional **Hint**, each per language;
- a **Required** toggle.

Depending on the type there are further settings: the **Rating scale max** (2–10) for rating questions, the **Max length (characters)** for free-text questions, and the list of options for choice questions. Each choice option has a stable **Value**, which is stored with responses, and a **Label** you can translate per language; options can be added, reordered by dragging, and removed.

Preview

The Preview tab shows how the form will appear to clients, so you can check the wording and order before saving.

Deleting a form

To delete a form, click the bin icon (**Mark for deletion**) in the toolbar. A warning appears and the form becomes read-only while marked; click **Save** to delete it, or click the bin icon again to keep the form.

Saving

Click **Save** to store the form. A form needs a name and at least one question, every question needs a heading in your default language, and choice questions need at least one option.

Feedback Responses

The feedback responses page lists the submissions collected for a single feedback form.

Overview

The header shows the form name and the total number of responses. Use the back arrow to return to the Feedback Forms page.

Browsing Responses

Responses are loaded a page at a time from the server, so you can step through large numbers of submissions. Each row shows when the response was submitted and who submitted it.

Anonymous Responses

If a response was submitted anonymously, the submitter column shows an **anonymous** badge instead of a name. Otherwise the client's name is shown.

Viewing a Response

Click the view icon on a row to open the response detail. The detail view is read-only and shows each question together with the client's answer, along with the submission time and the anonymous badge where applicable. Close the detail to return to the list.

Settings

The settings page manages your personal account: your profile details on the **Profile** tab and your password and Support Pin on the **Credentials** tab. System administrators see two further tabs, **Cache** and **Environments**, used for platform maintenance.

Profile

The **Profile** tab holds your personal details:

- **Language** — the language of your own dashboard. It does not affect your organisation's client-facing language settings.
- **UI Culture** — the regional format used, for example for dates.
- **First name** and **Last name** — both are required.
- **Email** and **Mobile** — shown read-only; change them with the pencil button next to each field (see below).

Save your changes with the save icon in the top bar — it stays disabled until you change something. The app version is shown in the bottom corner of the page.

Changing Your Email

Click the pencil button next to **Email** to open the **Update email** dialog. Enter the new address and click **Submit**. A three-digit code is emailed to the new address ("We have sent you an email with a code, please enter it below."). After you confirm the code, the dialog reports "Your email has been updated and you need to login anew." — clicking **Continue** logs you out so you can sign in with the new address.

Changing Your Mobile Number

Click the pencil button next to **Mobile** to open the **Update mobile** dialog. Enter the new number and click **Submit**. A three-digit code is sent to the new number by SMS. After you confirm the code, your mobile number is updated and you are logged out to sign in anew.

Changing Your Password

Open the **Credentials** tab. Enter your current password, a new password, and a four-digit **Support Pin**. A checklist shows the requirements as you type: current password set, length (at least 10 characters), lower case, upper case, number, special character, and support pin set. Click **Update credentials** — the button stays disabled until all requirements are met.

Switching Groups

If your account belongs to more than one group, the Profile tab also shows a **Group** selector with a **Change group** button. Pick another group and click **Change group** — the dashboard reloads with that group's data.

Subscription

The subscription page shows your account's billing details, invoices, and the service modules your organisation uses. It has three tabs: **Bills**, **Contact information**, and **Subscription**.

Bills

The **Bills** tab lists your invoices. Pick a year from the selector to filter the list, then download any invoice as a PDF using the **Download PDF** icon. Each row shows the **Month**, the **Invoice number**, the **Amount**, and the VAT included (**Whereof VAT**).

Contact Information

The **Contact information** tab holds the details used on your invoices: **Company name**, **Bill recipient**, **Address line one**, **Address line two**, **Postal code**, **City**, and **Country**.

Two email lists follow: **Send bills to the following emails** and **Send tech related information to the following emails**. Each list can hold up to five addresses — use the plus icon to add one and the delete icon to remove one.

Subscription

The **Subscription** tab shows your account details — **Account id**, **Account created**, **Trial ends** (if applicable), **Currency**, and **Payment method**. These fields are read-only.

Below the account details, **Your current service consumption** lists each service with its current count and running cost, together with the **Monthly cost estimate**.

Some services have switches:

- The service modules — **Commerce (payments & orders)**, **Wallets**, **Vouchers**, **Products**, and **Feedback forms** — can be switched on and off. **Wallets**, **Vouchers**, and **Products** require Commerce: while Commerce is off they are locked with the hint "Requires payments", and switching Commerce off turns them off as well. **Feedback forms** works independently of Commerce.
- **API fees** and **White label fees** can only be switched on from this page; once active, the switch is disabled.

Saving Changes

Use the save icon in the top bar to store your changes. It stays disabled until you make an edit and all recipient email addresses are valid.

Cancelling or Reactivating

While the subscription is active, the **Cancel subscription** button at the bottom of the Subscription tab opens a confirmation dialog that requires your password. After the cancellation has been processed you receive a confirmation email, and you can keep using your account for another 30 days before it is permanently deleted.

While the subscription is cancelled, a red notice above the tabs shows the closing date ("Your subscription is cancelled and will be permanently closed . . . ") together with a **Reactivate subscription** button, which also asks for your password to confirm.

Pro Bono Accounts

Pro bono accounts see a reduced page: the Bills and Subscription tabs are hidden, and the Contact information tab shows the note “You have a pro bono account!” without the bill-recipient fields.

> This page is unavailable while you are offline.

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