HELP MANUAL

Estética Gestión

Complete system guide for Manager, Professional and Assistant

Web version and mobile app

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INTRODUCTION

About this manual

This manual explains, module by module, everything you can do in **Estética Gestión**: what each screen is, what it's for, how to use it step by step, and what each team role can see or do. It covers both the **web version** (modules 01 to 08) and the specifics of the **mobile app** (module 09).

Estética Gestión plans

The system is offered in four plans, designed for different business sizes:

Plan	Designed for	Team
Basic	Getting started	1 professional
Professional	Independent professionals	1 professional
Business	Growing practices	Up to 5 professionals
Excellence	Large practices	Unlimited professionals

> 💡 The **Basic** and **Professional** plans are for **a single professional**: whoever uses them works solo, with no team to manage. The **Business** and **Excellence** plans let you build a team, with the Manager, Professional and Assistant roles explained below.

System roles

In an account with a team (Business or Excellence plans), the **Manager** (the account owner) adds team members from **Settings → Team**, assigning each one of these roles:

- **Manager:** full access to every module and to the business configuration. An account can have more than one Manager.
- **Professional:** attends to patients; manages their own schedule and, depending on what their role allows, may view or manage information from other professionals in the same sector or business.
- **Assistant:** a role designed for administrative tasks (front desk, appointments); can manage the schedule and patient data according to what the role allows, but has certain clinical actions restricted (for example, recording the outcome of a session).

> ⚠️ **Important:** each role's permissions (what a Manager, a Professional, or an Assistant can see or do on each screen) are **defined by the platform** and are the same for every account; the Manager **does not configure or change them** — they only choose, when adding someone, which of the three roles applies. Every article in this manual includes an **"Access by role"** section describing each one's behavior.

In an account on the **Basic** or **Professional** plan (a single professional, no team), whoever uses the system is an **Individual user**: they don't manage a schedule or other professionals' data, and they don't see the professional selector or the Schedule's General View, since those screens exist to coordinate a team.

How to use this manual

The content is organized into 9 modules, in the same order they appear in the system's side menu. Each module opens with a general introduction and continues with one article per screen or feature, always following the same structure: what it is, what it's for, where to find it, step by step, access by role, frequently asked questions, and common errors.

01

Dashboard

MODULE 01

Dashboard — Overview

What is this module?

The **Dashboard** (Home) is the first screen shown when you log into the system. It presents a summary of the business status: appointments, estimated revenue, weekly occupancy, upcoming client birthdays, sessions pending registration, and clients who have not visited the business for an extended period.

Who is it for?

For all system roles: **Manager**, **Professional**, and **Assistant** (see System roles). Each article in this module details, in its "Access by role" section, what each role can see or do. In general terms:

- Panels related to **patients** (birthdays, inactive clients, search) show information for the **entire business** equally for all three roles, since patients are shared across the whole account.
- Panels related to **appointments and revenue** (the "Appointments today"/"Estimated revenue" indicators, pending sessions, weekly occupancy) show the entire business for **Manager**, but for the **Professional** role are limited to their own appointments and revenue.
- The **Assistant** role sees appointments and revenue for the entire business (like the Manager), but does not have the button to register a session directly from the Dashboard.

Features

- Indicators (statistics cards)
- Weekly occupancy chart
- Patient search
- Notifications and alerts
- Upcoming birthdays
- Sessions pending registration
- Inactive clients
- Schedule a quick appointment from the Dashboard

Dashboard indicators (statistics cards)

What is it?

These are the three main cards shown at the top of the Dashboard, displaying the business's key indicators.

What is it for?

It lets you immediately view the status of the day and the week, without needing to go into other modules of the system.

Where to find it

Sidebar menu → Dashboard (home screen, at the top).

What each card shows

1. **Appointments today** The number of appointments scheduled for the current day, together with the percentage change compared to the previous period (green upward arrow if it increased, red downward arrow if it decreased).
2. **Estimated revenue** The estimated value generated by treatments and products during the month, together with its percentage change (see calculation details below). The amount is shown in the currency configured in the system.
3. **New clients** The number of new patients registered during the current week.

> 💡 **Tip:** hover over the percentage on each card to see a brief explanation of the trend it represents.

How the system calculates each indicator

Appointments today — percentage change

The system compares, week by week, the number of appointments recorded during the last four weeks. From those comparisons it calculates an average, which is the percentage shown. To prevent a one-off spike from distorting the result, the system caps the displayed value at a maximum of **+50%** and a minimum of **–50%**, even if the actual change was larger.

In other words, the indicator does not compare only today against yesterday, but the trend of recent weeks, in order to provide a more stable reading of whether appointments are increasing or decreasing.

Estimated revenue

This corresponds to the **second card** in the top row of the Dashboard (dollar-sign icon). It shows two figures:

- **Large number** (e.g. "$450,000"): the estimated revenue for the month.
- **Small percentage**, top right (e.g. "+12.50%"): the change in that estimate compared to the previous month.

⚠️ **Important:** this value **is not money collected**, but rather the value of the treatments and products being recorded for clients during the month (whether already paid or still pending payment). For money actually collected and each client's outstanding balances, see the **Finance** module.

How the large number is calculated:

1. The value already recorded so far this month is added up (cost of treatments started + price of products sold).
2. A projection for the rest of the month is added to that: the daily average of the **entire previous month**, multiplied by the days remaining to the end of the current month. (If there isn't yet a complete previous month to use as a reference, the average of the current month so far is used instead.)

Estimated revenue = value already recorded this month + (previous month's daily average × remaining days of the month)

This is an indicative projection of the month's business volume, not a final figure.

How the small percentage is calculated: it compares that estimated revenue against the total value recorded during the **entire previous calendar month**. For example, if $400,000 was recorded last month and this month's projection is $450,000, the percentage shown is +12.50%.

New clients

This corresponds to the number of patients registered in the system **from Monday of the current week to the current date**.

Access by role

- **New clients:** this figure applies to the **entire business** equally for all three roles, since patients are shared across the whole account.
- **Appointments today** and **Estimated revenue:** for **Manager** and **Assistant**, these two cards show the total for the **entire business**. For the **Professional** role, however, both cards are calculated **using only their own appointments and revenue** (those they themselves attended to or recorded), not those of the rest of the team.

💡 This means that if two users with different roles open the Dashboard on the same day, a Manager and a Professional may see different numbers for "Appointments today" and "Estimated revenue," even though both see the same number for "New clients."

Frequently asked questions

Why is a card's percentage shown in red?

It indicates that indicator decreased compared to the previous comparison period (for example, fewer appointments than the previous week).

Why does estimated revenue vary considerably when you first start using the system?

Because there is not yet a complete previous month to calculate the daily average, so the system instead uses the few days available in the current month, which produces a less stable projection. With more usage history, the projection becomes more accurate.

Common errors

- **The card shows "0" for all values** → this may be because no appointments, treatments, or clients have been loaded into the system yet, or the data is still being loaded (wait a few seconds and refresh the page).

Weekly occupancy chart

What is it?

A bar chart showing the schedule's occupancy percentage for the last 8 weeks. **Each bar represents a full week**, not a day.

What is it for?

It lets you identify the schedule's occupancy trend over recent weeks, making it easier to organize the team and plan promotions during weeks of lower occupancy.

Where to find it

Sidebar menu → Dashboard → "Weekly occupancy" panel.

Step by step

1. Go to the Dashboard.
2. Look at the central bar chart: each bar represents a week, and its height indicates the schedule's occupancy percentage for that week.
3. Hover over a bar to see the exact percentage.
4. **Manager role only:** at the top of the panel is the **Filter** selector. Select a specific sector to view its occupancy, or keep the **Global** option to view the business as a whole.

> 💡 **Tip:** if the business has multiple sectors or branches configured, use the filter to compare occupancy between them.

How the system calculates each bar's percentage

For each week, the system performs the following calculation:

Occupancy percentage = (schedule time booked with appointments) ÷ (total time available for work) × 100

- **Time booked** corresponds to the sum of the duration of all appointments scheduled that week.
- **Time available** is obtained from the business hours configured in **Settings** (working days and time slots), minus any time blocks that have been added (for example, a holiday or a recorded absence).
- When a user with the **Manager** role filters by **sector**, the calculation adds up the available time of all professionals in that sector.
- The percentage never exceeds 100%, even if appointments overlap.

In short, this indicator shows what proportion of available working hours was filled with appointments. A value of 100% means the schedule is completely full that week; a low value indicates greater availability of open time slots.

Access by role

- **Manager:** sees occupancy for the entire business and has the **Filter** selector by sector.
- **Professional:** the chart shows only their own occupancy; they do not have the filter by sector.
- **Assistant:** does not have the filter by sector; since this role does not attend to patients or have their own appointments, the chart normally has no relevant data to show for this role.

Frequently asked questions

Why isn't the filter by sector shown?

The filter is only available for the **Manager** role, and only when sectors are configured in the system.

What happens if there isn't enough data?

The chart may appear empty if no appointments have been recorded yet for that week, or if there are no business hours configured in **Settings**.

Common errors

- **The chart remains stuck in a loading state indefinitely** → refresh the page; if the issue persists, it may be a connection problem with the server.

Patient search (from the Dashboard)

What is it?

A search field located at the top of the Dashboard that lets you quickly find a patient by name.

What is it for?

To access a patient's record without first having to go into the **Patients** module and search there.

Where to find it

Dashboard header → "Search..." field (top right, next to the notifications icon).

Step by step

1. Click the search field.
2. Enter at least three letters of the patient's first or last name.
3. Wait for the results to appear below the field (a loading icon is shown while the search is being performed).
4. Click the relevant patient.
5. The system automatically redirects you to their record within the **Patients** module.

> 💡 **Tip:** the search does not run with fewer than three characters entered. This restriction prevents overly broad searches.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** can search for and access any patient in the business, regardless of who attended to them.

Frequently asked questions

Can you search by ID number or phone?

No. The Dashboard search works only by first and last name. To search by other details, use the search feature in the **Patients** module.

The patient you searched for doesn't appear — what should you check?

Confirm that the name is spelled correctly and that the patient is actually registered in the system. If the results list shows "no results," try a shorter search term.

Common errors

- **The results list doesn't close** → click anywhere else on the screen; the list closes automatically.

Notifications and alerts

What is it?

The notification system reports relevant business events; for example, if the linked WhatsApp account disconnected and, as a result, automatic reminders stopped being sent to clients.

What is it for?

It lets you become aware of situations that require attention, without needing to check each module separately.

Where to find it

Dashboard header → bell icon (top right). When there are unread notifications, a colored indicator is shown on the icon.

Step by step

Viewing recent notifications

1. Click the bell icon.
2. A panel opens showing the most recent notifications: title, message, and date/time.
3. Unread notifications are visually highlighted, with a colored indicator next to each one.

Marking a notification as read

- Click on an individual notification to mark it as read.
- Or click **Mark all as read**, at the top of the panel, to mark them all in a single step.

Deleting a notification

- Click the trash icon shown next to each notification.

Viewing the full history

1. Within the notifications panel, click **View history** (bottom of the panel).
2. A side panel opens showing all notifications, including those already read.
3. You can also delete them from this panel.

Accessing a notification's detail

Some notifications include a **See more** link. Clicking it redirects you directly to the screen related to that notification (for example, to **Settings → Notifications** if the alert relates to a WhatsApp disconnection).

Access by role

- **Manager:** receives all business notifications, including the WhatsApp disconnection alert.
- **Professional:** only receives notifications generated specifically for them. The "WhatsApp Disconnected" alert is not generated for this role (only for Manager and Individual user).
- **Assistant:** this role **does not have access to the notification system**; the bell icon shows no alerts for this role.

Frequently asked questions

Why does it say "automatic notifications are paused"?

Because automatic WhatsApp reminders are enabled in **Settings**, but the business's WhatsApp is disconnected. It needs to be reconnected from **Settings → Notifications** for reminders to be sent again.

Do all users see the same notifications?

Not necessarily. Some alerts, such as the WhatsApp disconnection alert, are shown only to certain system roles.

I'm an Assistant and the bell icon never shows anything — is this an error?

No, this is expected behavior: the Assistant role does not have access to this feature, so the notifications panel always appears empty.

Common errors

- **A notification is deleted by mistake** → it cannot be recovered from the system. If it contained relevant information, we recommend checking the related module directly.

Upcoming birthdays

What is it?

A list within the Dashboard showing the upcoming birthdays of registered clients.

What is it for?

It lets you anticipate clients' birthdays, whether to send them a greeting or offer a special promotion that helps build loyalty.

Where to find it

Sidebar menu → Dashboard → "Birthdays" panel (next to the occupancy chart).

Step by step

1. Go to the Dashboard.
2. The birthdays panel shows each client's name along with their birthday date.
3. Click a client's name to go directly to their record in **Patients**.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** see the same upcoming birthdays for all clients in the business, regardless of who attended to them.

Frequently asked questions

The panel shows no birthdays — is that normal?

Yes. If no registered client has an upcoming birthday, the panel indicates there are no birthdays to show.

Where does the system get the birthday date from?

From the date of birth recorded in the patient's record. If a client has no date of birth entered, they will not be included in this list.

Common errors

- **A client whose birthday is approaching does not appear in the list** → check that the date of birth is correctly entered in their record, within the **Patients** module.

Sessions pending registration

What is it?

A table within the Dashboard listing treatment sessions that should already have taken place (or are about to take place) and have not yet been recorded in the system.

What is it for?

It helps ensure the timely recording of each session's outcome: procedure performed, patient attendance, observations, and other details. Keeping this information up to date is essential for the patient's clinical history and for the business's statistics.

Where to find it

Sidebar menu → Dashboard → "Pending sessions" panel.

What it shows

For each pending session, the table shows:

- **Patient** and the treatment the session belongs to.
- **Scheduled date** and the professional in charge.
- A **Register** button to complete the session's details.

Step by step

1. Go to the Dashboard.
2. Find the **Pending sessions** panel; the number next to the title indicates how many sessions are pending.
3. Click the patient's name to access their record, or click **Register** to open the session entry window without leaving the Dashboard.
4. Fill in the session details in the pop-up window and confirm to save.
5. The session is automatically removed from the pending list.

> 💡 **Tip:** the **Register** button is not available for the **Assistant** role; this action is reserved for profiles that attend to the patient directly.

Access by role

- **Manager:** sees pending sessions for the **entire business** and can register any of them.
- **Professional:** sees and can register **only their own pending sessions**; those of other professionals do not appear in their list.
- **Assistant:** sees pending sessions for the **entire business** (like the Manager), but **never has the "Register" button available**; this action is reserved for the Manager and Professional roles.

Frequently asked questions

Why do I see fewer pending sessions than a coworker with a different role?

Because the **Professional** role only sees their own pending sessions, while Manager and Assistant see those for the entire business.

Why isn't the "Register" button shown on some sessions?

If your role is Assistant, this button is never available. If your role is Manager or Professional and you don't see the button, check that the session belongs to you.

What happens if a pending session is not registered?

It stays accumulated in the list. We recommend keeping this record up to date to preserve the accuracy of the patient's history and the business's reports.

Common errors

- **"The session could not be saved"** → this may be due to a connection issue. Check the entered data and try again. If the problem persists, contact support.

Inactive clients

What is it?

A table within the Dashboard listing clients who have not visited the business for an extended period.

What is it for?

It helps identify patients at risk of disengaging and reach out to them in time, for example, to offer them a chance to resume a treatment or a reactivation promotion.

Where to find it

Sidebar menu → Dashboard → "Inactive clients" panel.

What it shows

For each inactive client, the table shows:

- Client's **name**.
- **Last visit** recorded (or an indication that no visits are on record).
- A **WhatsApp** button to start a direct conversation, if the client has a phone number on file.

Step by step

1. Go to the Dashboard.
2. Check the **Inactive clients** panel.
3. Click the client's name to access their full record.
4. If the client has a WhatsApp number on file, click the corresponding icon to start a conversation (this opens WhatsApp Web or the app, depending on the device used).

How the system determines whether a client is "inactive"

A client is classified as **inactive** when both of the following conditions are met at the same time:

1. **No sessions recorded in the last 3 months.**
2. **They are not a new client.** A client registered less than a month ago who still has fewer than 2 completed sessions is considered "new"; these clients are not classified as inactive, even if they have not yet had any sessions.

In other words: if the client has not visited the business in the last three months and is not a recent sign-up, the system flags them as inactive, allowing follow-up before an eventual permanent loss.

This same criterion — three months without sessions — is also used by the **Marketing** module in its reports on inactive or lost clients.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** see the same list of inactive clients for the business, regardless of who attended to them.

Frequently asked questions

What criterion does the system use to classify a client as "inactive"?

The absence of recorded sessions during the last 3 months (see details in the previous section). This calculation is automatic and requires no additional configuration.

The WhatsApp button doesn't show for a client — why?

Because that client doesn't have a WhatsApp number on file in their record. You can add one from the **Patients** module.

Common errors

- **The WhatsApp button doesn't open a conversation** → check that the number on file in the client's record is valid (including the correct country and area codes).

Scheduling a quick appointment from the Dashboard

What is it?

A shortcut that lets you create a new appointment without needing to go into the **Agenda** module.

What is it for?

To speed up appointment entry while on the home screen, for example, while handling a call or a message from a client.

Where to find it

Dashboard header → "New appointment" button (top right).

Step by step

1. Click **+ New appointment**.
2. The system checks that at least one patient is registered.
   - If **there are no registered patients**, a notice is shown ("You need to add a patient before creating an appointment") and you are automatically redirected to the **Patients** module to complete the registration.
3. If patients already exist, the **Schedule appointment** window opens.
4. Fill in the required details: patient, treatment, date, and time.
5. Confirm to save the appointment.
6. The Dashboard updates automatically to reflect the new appointment in the indicators and in the pending sessions panel.

> 💡 **Tip:** if the patient does not yet have a treatment started, the same window lets you start a new one at the time of scheduling the appointment.

Access by role

- **Manager:** can schedule appointments for any professional in the business.
- **Professional:** can only schedule appointments on their own calendar.
- **Assistant:** can schedule appointments for any professional in the business, the same as the Manager.

Frequently asked questions

Is this equivalent to creating an appointment from the Agenda module?

Yes, it's the same functionality, accessible directly from the Dashboard for greater speed. To view the full schedule (day, week, month), continue using the **Agenda** module.

Common errors

- **"The appointment could not be scheduled"** → check that all required fields are filled in and that there is no time conflict with another appointment already scheduled.

02

Agenda

MODULE 02

Agenda — Overview

What is this module?

The **Agenda** module lets you view and manage the business's appointments in a calendar: create appointments, reschedule them, mark them as completed, cancel them, and block off times when the business is not open for appointments.

Who is it for?

For all system roles (see System roles). Each article details the specific behavior in its "Access by role" section. In general terms:

- The **Individual user** (with no professionals reporting to them) sees only their own agenda, with no professional selector or Overview.
- **Manager** and **Assistant** can view and manage (schedule, edit, reschedule, block time) the agenda of **any professional in the business**.
- **Professional** can only **manage their own agenda**. They can also **view** (without editing) the agenda of coworkers in their same sector, if the business has sectors configured; without sectors configured, they only see their own.
- The **Assistant** role does not have the action to register completed sessions, which is reserved for Manager and Professional.
- The **Collisions and opportunities** panel is an exception: it always shows information for the entire business, equally for all three roles.

Features

- The appointment calendar
- Scheduling an appointment
- Viewing, editing, and canceling an appointment
- Rescheduling an appointment (drag and drop)
- Registering a completed session
- Blocking time slots
- Overview (all professionals)
- Collisions and opportunities
- Print / export the agenda as PDF

The appointment calendar

What is it?

The main screen of the **Agenda** module, a calendar where you can view scheduled appointments, completed sessions, canceled ones, and blocked time slots.

Where to find it

Sidebar menu → Agenda.

How to read the calendar

Professional selector

When the user has permission to view more than one professional's agenda, a **selector with the professional's name** is shown in the header (next to a green dot), to the left of the "Appointment Agenda" title. Choosing a different professional in that selector updates the calendar to show only their agenda.

If the user only manages their own agenda (or the business has a single professional), this selector is not shown. See the exact details by role below.

Available views

At the top of the calendar you can switch between three views:

- **Month**: shows the whole month's appointments in a monthly calendar format.
- **Week**: shows the current week's appointments, hour by hour (default view).
- **Day**: shows the detail of a single day, hour by hour.

The **prev / next / today** buttons, to the left of the title, let you navigate between periods or return to the current date.

Appointment colors and statuses

Each appointment is shown in a different color depending on its status:

- **Pending appointment**: standard color, not yet registered as completed or canceled.
- **Canceled appointment**: shown in a distinct color, with the "Canceled" icon.
- **Completed appointment**: shown in a distinct color, with the "Completed" icon.

Additional icons may also appear on an appointment:

- **Rescheduled**: indicates the appointment was moved from its original time.
- **Birthday!**: shown when the appointment date coincides with the patient's birthday.
- An **alert** icon, which shows information, warnings, or hazard data recorded in the patient's record (for example, allergies). Hovering over the icon displays the detail.

Blocked time slots

Time slots outside the business hours configured in **Settings**, as well as manual blocks that have been added (see Blocking time slots), are shown shaded on the calendar and cannot be used to schedule appointments.

Access by role

- **Manager:** sees the professional selector, with all professionals in the business, and has unrestricted access to any agenda.
- **Professional:** their own agenda is the only one they can work with normally. If the business has **sectors** configured and there is more than one professional in their same sector, they see the selector to **view** their sector coworkers' agendas (not those of other sectors); but they can only **create, edit, or reschedule appointments in their own agenda**, not in their coworkers'.
- **Assistant:** sees the selector with **all professionals in the business** (without the sector restriction that applies to Professional) and can create, edit, and reschedule appointments in any of their agendas.

How agendas are distributed by sector (Professional)

If your business doesn't use **sectors** (for example, a single office or specialty), this distinction doesn't apply: the Professional role works the same way, limited to their own agenda. If the business does have sectors configured (see Settings) and assigns professionals to each one, a Professional can only view the agenda of other professionals in their **same sector**, not that of professionals in other sectors of the business.

Frequently asked questions

Why can't I click on certain time slots?

Because they correspond to a time outside the configured business hours, or to a manual block added for that time slot.

Does the calendar update automatically?

Yes, it updates every time you navigate to a different date or save a change (new appointment, rescheduling, cancellation, etc.), without needing to reload the page.

Common errors

- **No appointments appear when entering the Agenda** → check that the correct professional is selected (if the professional selector is available) and that the visible date corresponds to the period you want to view.

Scheduling an appointment

What is it?

The action of creating a new appointment on the agenda, for a given patient and treatment.

Where to find it

There are two ways to access it:

- The **"New Appointment"** button, in the Agenda module header.
- Clicking directly on an available time slot in the calendar.

Step by step

1. Open the **New Appointment** window using either of the two methods above.
2. The system automatically checks two conditions before letting you continue:
   - That at least one **patient** is registered in the system. If none exist, the notice "You need to add a patient before creating an appointment" is shown and you are redirected to the **Patients** module.
   - That at least one **treatment** has been created. If none exist, the notice "No Treatments" is shown and you are asked to create treatments from the **Treatments** module.
3. Select the **patient**, searching by name in the corresponding field (it works as a search box: as you type, the list of matches is filtered).
4. Indicate whether the appointment corresponds to:
   - **Continue Treatment**: select one of the patient's active treatments. Each option in the list shows, next to the name, the treatment's start date and session progress (for example, "Treatment X - Start: 03/01/2026 - Sessions: 2/6"), so you can identify at a glance what stage it's at.
   - **Start New**: select a treatment from the catalog to start it right then. The system automatically fills in the settings configured for that treatment (number of sessions, duration, and cost), but these three values can be edited manually at this same step if needed. If the treatment has **add-ons** configured, they are shown as checkboxes, with each one's additional cost shown next to it (for example, "Deep cleaning (+$500)").
5. Choose the **appointment date**. The system shows the available times for that date, calculated based on the configured business hours and the appointments and blocks that already exist.
6. Select the desired time and confirm with **Schedule**.

> ⚠️ If your role does not have agenda permission for the selected professional, you won't even see the available times or the confirm button: both elements are shown only when the user has write permission on that agenda (see "Access by role" below).

> 💡 **Tip:** if you click directly on an open time slot on the calendar, the date and time are already pre-selected in the window.

System validations

- Does not allow scheduling appointments on **past dates** if the corresponding option is disabled in **Settings**.
- Does not allow scheduling on a **blocked** time slot or outside business hours.
- If the patient **already has another appointment at the same time**, a collision notice is shown ("This patient already has another appointment at this time. Do you want to schedule anyway?"), allowing you to confirm the action anyway if you choose to.

Access by role

- **Manager:** can schedule appointments for any professional in the business.
- **Professional:** can only schedule appointments on their **own agenda**. Even though they can view the agenda of coworkers in their same sector (see The appointment calendar), they cannot create appointments on another professional's agenda.
- **Assistant:** can schedule appointments for any professional in the business, the same as the Manager.

Frequently asked questions

Can I schedule an appointment for a treatment the patient doesn't have yet?

Yes, by selecting the **Start New** option within the appointment window, the treatment is started and the appointment is scheduled in a single step.

What happens if I schedule an appointment and the patient has an outstanding debt?

The patient's debt does not prevent scheduling the appointment; it is managed separately from the **Patients** or **Finance** module.

Common errors

- **"Incomplete fields"** → check that all required fields have been filled in (patient, treatment, date, and time).
- **"The appointment could not be scheduled"** → this may be due to a connection issue; try again.

Viewing, editing, and canceling an appointment

What is it?

The action of viewing the details of an already-scheduled appointment and, from that same window, modifying it, canceling it, or re-enabling it.

Where to find it

By clicking on an existing appointment in the **Agenda** calendar.

Step by step

1. Click on the desired appointment in the calendar.
   - If the appointment **hasn't been completed yet**, the appointment editing window opens.
   - If the appointment **has already been registered as completed**, the session detail window opens instead (see Registering a completed session).
2. From the appointment editing window you can:
   - Change the patient, treatment, date, or time.
   - Cancel the appointment, with the **Cancel Appointment** button.
   - Confirm the changes with **Confirm Appointment**.
3. If the appointment was **canceled**, the window offers the **Enable Appointment** button to reverse the cancellation.

Access by role

- **Manager:** can view, edit, and cancel any appointment in the business.
- **Professional:** can edit and cancel only appointments on their **own agenda**. On a coworker's agenda within their same sector, they can view appointments (only if already completed), but cannot edit or cancel them.
- **Assistant:** can view, edit, and cancel appointments for **any professional in the business**, the same as the Manager.

Frequently asked questions

What's the difference between canceling an appointment and deleting it?

The system does not delete appointments: when canceled, the appointment remains visible on the calendar marked as "Canceled," preserving the historical record. It can be re-enabled at any time.

Can I edit an appointment that has already been canceled?

Yes, you can re-enable it and then modify it normally.

Common errors

- **Can't click on an appointment** → check that you have the appropriate permissions for that professional's agenda; some roles can only view, not edit, other professionals' appointments.

Rescheduling an appointment (drag and drop)

What is it?

A quick way to change an appointment's date or time by dragging it directly on the calendar.

Where to find it

Directly on the **Agenda** calendar, in the **Week** or **Day** views.

Step by step

1. Click on the appointment you want to move and, without releasing, drag it to the new desired time.
2. Upon release, the system asks for confirmation: "Do you want to reschedule the session from [previous time] to [new time]?"
3. Confirm to apply the change, or cancel to have the appointment return to its original time.

System validations

- Only appointments that are **not completed or canceled** can be moved.
- An appointment cannot be moved to a **past date** if that restriction is enabled in **Settings**.
- An appointment cannot be moved to a **blocked** time slot.
- If the patient already has another appointment at the new time, a collision notice is shown, allowing you to confirm the move anyway if you choose to.

Access by role

- **Manager:** can reschedule any appointment in the business.
- **Professional:** can reschedule only appointments on their **own agenda**; they cannot drag appointments belonging to other professionals, even those in their same sector.
- **Assistant:** can reschedule appointments for **any professional in the business**, the same as the Manager.

Frequently asked questions

Can an already-completed appointment be rescheduled?

No. Appointments marked as completed cannot be moved this way; their actual date remains recorded as part of the patient's history.

How do I know an appointment was rescheduled?

The appointment shows the "Rescheduled" icon on the calendar.

Common errors

- **"Completed or canceled sessions cannot be moved"** → enable the appointment first if it was canceled, or revert the "completed" status from the session record if applicable.
- **"The session cannot be rescheduled to a blocked time slot"** → choose a time that isn't shaded/blocked on the calendar.
- **"Error while rescheduling"** → this may be due to a connection issue; try again.

Registering a completed session

What is it?

The action of recording in the system that an appointment actually took place, by entering the details for that session.

What is it for?

It keeps the patient's clinical history and the business's statistics up to date (see also Sessions pending registration on the Dashboard).

Where to find it

- By clicking the **Register** button, available in the editing window of a pending appointment.
- From the **Pending sessions** panel on the Dashboard.

Step by step

1. Open the pending appointment you want to register and click **Register**.
2. The **Register Session** window opens, where you can fill in:
    - **Date performed** (the actual date the session took place).
    - **Equipment / Device** used, if applicable.
    - **Treatment parameters** applied during the session.
    - **Patient's tolerance level**.
    - **Session comments** (free-form notes).
    - **Session photos**: images can be uploaded to the session's gallery (for the Professional role, these photos are then only visible to whoever uploaded them; see Diagnosis).
    - **Reminder message**: an optional note that will be shown automatically the next time that patient's record is opened.
3. Save the changes to confirm the entry.
4. If the patient has an **outstanding balance**, the system asks whether to enter a payment at that time; if confirmed, the payment entry window opens.

> 💡 If the treatment has supplies configured, saving the session automatically deducts from inventory the portion of supplies corresponding to that session. This happens only once per session, even if it is later edited again.

Access by role

- **Manager:** can register sessions for any professional in the business.
- **Professional:** can register sessions belonging to their own agenda.
- **Assistant:** this role **does not have the register sessions action**; it is reserved for the Manager and Professional roles, since it involves entering clinical treatment information.

Frequently asked questions

Can I register a session without filling in all the fields?

Yes, most fields are optional; only the minimum required information is enforced.

Can I modify an already-registered session?

Yes, clicking again on the completed appointment on the calendar takes you back to its details.

Common errors

- **"The session could not be saved"** → check your connection and try again.

Blocking time slots

What is it?

A feature that lets you mark a time slot (or the entire day) as unavailable for scheduling appointments, for example, due to an absence, a holiday, or an administrative task.

Who is it for?

Available according to the permissions the platform defines for each role; not all roles have this action (see "Access by role" below).

Where to find it

In the **Week** or **Day** views of the **Agenda** calendar, each day column shows a small **lock** icon next to the date, in that column's header. This icon is only visible to roles enabled to create blocks.

Step by step

1. Click the lock icon for the day you want to block. The **Block time slot** window opens.
2. Choose the **block type**:
   - **All day**: blocks the entire selected day.
   - **Time range**: lets you specify a particular **start time** and **end time**.
3. Optionally, fill in a **description** with the reason for the block.
4. Save the block.
5. The blocked slot is shown shaded on the calendar, and appointments cannot be scheduled on it.

Removing a block

1. Click on the block in the calendar.
2. Confirm the deletion in the "Are you sure you want to delete this time block?" message.

Access by role

- **Manager:** can block time slots on any professional's agenda in the business.
- **Professional:** only sees the lock icon, and can only use it, on their **own agenda**; they cannot block time slots for other professionals, even those in their same sector.
- **Assistant:** can block time slots on **any professional's agenda in the business**, the same as the Manager.

Frequently asked questions

Does a block affect all professionals or just one?

The block is associated with the agenda of the professional selected at that time (or with the user's own agenda, if they don't manage other professionals' agendas).

Can I schedule an appointment on a blocked time slot?

No. The system does not allow clicking or scheduling appointments on a blocked slot.

Common errors

- **The option to block a time slot doesn't appear** → the user's role does not have this action enabled.

Overview (all professionals)

What is it?

An alternative calendar view that shows, on a single screen, the agenda of **all professionals in the business for the same day**, each in their own column.

Who is it for?

For the **Manager**, **Professional**, and **Assistant** roles. Not available for the **Individual user** (who has no professionals reporting to them and only manages their own agenda).

Where to find it

Sidebar menu → Agenda → "Overview" button (in the header, next to "Standard View").

Step by step

1. Click **Overview**.
2. The screen is organized by time slots (rows) and professionals (columns), showing each one's appointments for the selected day.
3. Use the date selector to switch days.
4. Click on an appointment to view or edit it, or on an open slot in a professional's column to schedule an appointment directly with them.
5. To return to the regular calendar view, click **Standard View**.

Relationship with Collisions and Opportunities

This view also gives access to the **Opportunities** panel, which groups overlapping appointments (collisions) and schedule reorganization suggestions. See details in Collisions and opportunities.

Access by role

- **Manager:** sees the columns of all professionals in the business and can schedule or edit appointments in any of them.
- **Professional:** sees only the columns of professionals in **their same sector** (if the business has sectors configured), or no additional column besides their own (if it doesn't). That view of sector coworkers is **view-only**: they cannot schedule, edit, or reschedule appointments on another professional's agenda, only on their own.
- **Assistant:** sees the columns of **all professionals in the business**, without the sector restriction that applies to Professional, and can schedule, edit, and reschedule appointments for any of them. The Assistant role itself **does not appear as a column** in this view, since it does not manage its own patient-facing agenda.

Frequently asked questions

Why don't I see all professionals in the Overview?

If your role is Professional, you only see professionals in your same sector (if the business uses sectors). Manager and Assistant always see everyone.

Does the Overview show several days at once?

No, it shows a single day at a time; to see a different day, change the date using the corresponding selector.

Common errors

- **The "Overview" button doesn't appear** → this applies to the **Individual user** role, which has no professionals reporting to them; in that case, only the standard view of their own agenda is available.

Collisions and opportunities

What is it?

An automatic alert panel that the system calculates based on the agenda, made up of two types of information:

- **Collisions**: overlapping appointments for the same patient.
- **Opportunities**: suggestions for reorganizing appointments to make better use of available time slots.

Where to find it

In the **Agenda** module header there are two independent indicators, which only appear when the system detects something to flag:

- **Lightbulb icon** 💡, with a number: the number of **reorganization suggestions** available. Only appears if there is at least one suggestion.
- **Red number** on the **"Overview"** button: the number of **overlapping appointments (collisions)** detected. Only appears if there is at least one collision.

Clicking the lightbulb icon, if not already in the Overview, automatically switches the system to that view and opens the panel with the details of collisions and suggestions.

What it shows

Overlapping appointments (collisions)

The system detects when the same patient has **two appointments that overlap in time** (for example, scheduled at the same time with two different professionals) and groups them in this section, indicating the client's name and the appointments involved.

Suggestions

The system analyzes each patient's care history and the professionals' schedule availability, and suggests reorganizations when it detects, for example, that a patient could be seen by the professional who has historically attended to them, taking advantage of an open slot in that professional's agenda.

Step by step

1. Click the lightbulb icon 💡 (only visible if suggestions are available).
2. Review the list of overlapping appointments, if any.
3. Review the reorganization suggestions, if any.
4. Click on any of the mentioned appointments to go directly to editing it.

Access by role

This panel is an exception to the scope restrictions of the rest of the Agenda module: **Manager**, **Professional**, and **Assistant** see exactly the same collisions and suggestions, corresponding to the **entire business**, regardless of each one's sector or agenda. The restrictions on editing an appointment detected here do apply, as in the rest of the Agenda (see Viewing, editing, and canceling an appointment).

Frequently asked questions

Does the system reorganize appointments automatically?

No. It only shows suggestions; any time change must be confirmed manually, by editing or rescheduling the corresponding appointment.

Why don't I see the lightbulb icon or the number on the "Overview" button?

Because both indicators only appear when the system actually detects suggestions or collisions, respectively. If the agenda has no overlaps or reorganization opportunities, neither one appears.

Common errors

- **No indicator is shown even though a duplicate appointment is suspected** → check that both appointments actually correspond to the same patient and overlap in time; the system only detects collisions under those conditions.

Printing / exporting the agenda as PDF

What is it?

A feature that generates a PDF file with the current view of the appointment calendar, including the business's name and logo.

Where to find it

Sidebar menu → Agenda → "Print" button (printer icon, in the header).

Step by step

1. Set the calendar to the view and period you want to export (day, week, or month).
2. Click **Print**.
3. The system shows the message "Generating PDF... Please wait a moment" while it prepares the file.
4. Once generated, the PDF file downloads automatically, with the business's name and logo (configured in the account profile) in the header.

Access by role

Available for all three roles (Manager, Professional, and Assistant): each one exports the agenda currently visible on their screen, according to the scope their role has enabled.

Frequently asked questions

Does the PDF export all appointments or only those visible on screen?

It exports the content corresponding to the view and period currently being displayed on the calendar.

Can I export the Overview as a PDF?

This feature is available from the standard calendar view.

Common errors

- **The PDF doesn't include the business logo** → check that the logo is uploaded to the account profile; otherwise, the PDF is generated with only the business name.

03

Patients

MODULE 03

Patients — Overview

What is this module?

The **Patients** module holds all the information about the business's clients: personal data, medical record, diagnosis with photos, treatments, activity history, payments, and product sales.

Who is it for?

For the **Manager**, **Professional**, and **Assistant** roles. What each one can see or do depends on the permissions the platform defines for their role; each article details this in its "Access by role" section.

Features

- Patient list and filters
- Creating a new patient
- Patient record: tabs and navigation
- Info tab
- Medical Record tab
- Diagnosis tab
- Diagnosis photo editor
- Treatments tab (and payments)
- History tab
- Products tab
- Patient alerts and notices
- Deactivating a patient

Patient list and filters

What is it?

The main screen of the **Patients** module: a table with all the business's patients, showing contact details, next appointment, automatic tags, and quick access to the full record.

Where to find it

Sidebar menu → Patients.

What it shows

- **Header:** total number of patients and number of active patients.
- **Search box:** by first name, last name, or email.
- **Filter tabs:** All, Debtors, VIP, Inactive, New (each one shows, in parentheses, the number of patients that meet that condition).
- **Table:** patient (with file number), contact, next scheduled appointment, and the corresponding tags.

Automatic tags

The system automatically calculates some tags for each patient, visible as a small colored badge next to their name:

- **VIP:** patient with more than 10 sessions in the last 3 months.
- **New:** patient registered less than 1 month ago, with fewer than 2 completed sessions.
- **Inactive:** patient with no sessions in the last 3 months (and not "New").
- **Debtor:** patient with an outstanding balance.
- **No-show:** patient with more than 15% of canceled appointments in the last 3 months (this tag is shown as a badge on the record, though it no longer has its own filter tab in the list).

Step by step

1. Go to **Patients**.
2. Use the search box or the filter tabs to narrow down the list.
3. Click on any row to open that patient's full record.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** see the same full patient list, regardless of who attended to them.

The exception is the **Debtors** filter:

- **Manager** and **Assistant** see it and can use it.
- **Professional** never has access to this filter.

Frequently asked questions

Why does a patient show as "Inactive" and "New" at the same time?

This cannot happen: a recently registered patient is considered "New," and while that status lasts, the system does not mark them as "Inactive" even if they don't have sessions yet.

Why don't I see the "Debtors" tab?

Because the **Professional** role does not have access to this financial information; it is available only to Manager and Assistant.

Common errors

- **The list doesn't load and shows an error message** → use the retry button; if the problem persists, it may be a connection issue.

Creating a new patient

What is it?

Registering a new patient in the system, with their personal and contact details.

Where to find it

Sidebar menu → Patients → "New Patient" button (top right).

Step by step

1. Click **New Patient**.
2. A blank record opens, on the **Info** tab.
3. Fill in the patient's details. The only required fields are **First Name** and **Last Name** (marked with an asterisk); the rest of the details (date of birth, sex, contact, address, social media, notes) are optional and can be filled in later.
4. Click **Save**.
5. The patient is registered and available in the list, with the rest of their record's tabs (Medical Record, Diagnosis, Treatments, History, Products) already enabled to fill in.

Access by role

Available equally for all three roles: **Manager**, **Professional**, and **Assistant** can create new patients, since patients are shared across the entire business.

Frequently asked questions

Can I enter just the name and fill in the rest later?

Yes, only first and last name are required when saving; the rest of the information can be completed at any time from the patient's record.

Common errors

- **The patient can't be saved** → check that the **First Name** and **Last Name** fields are filled in.

Patient record: tabs and navigation

What is it?

The window that opens when you click on a patient (from the list, from the Dashboard, or from the Agenda), with all their information organized into tabs.

Where to find it

By clicking on any patient in the **Patients** list, or from their name on other screens in the system (Dashboard, Agenda).

Tab organization

The record groups its tabs into two sections, visible in the window's side menu:

Record

- Info: personal and contact details.
- Medical Record: history, habits, lifestyle, skin, alerts.
- Diagnosis: reason for consultation, suggested treatment, and photo gallery.

Management

- Treatments: the patient's treatments, sessions, balance, and payments.
- History: timeline of all the patient's activity.
- Products: product sales to this patient. This tab exists only in the web version (see "Access by role" below).

Step by step

1. Click on a patient to open their record; it always opens on the **Info** tab.
2. Use the window's side menu to move between tabs.
3. Close the record using the corresponding button to return to the list (the list refreshes automatically when closed).

Access from other screens

You can also reach a patient's record directly from:

- The search box and various panels on the Dashboard.
- An appointment in the Agenda, via the **Record** option.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** can access any patient's record, regardless of who attended to them. However, within the record there are specific role-based restrictions in several tabs — summarized here, with full details in each tab's article:

- The **Medical Record** tab is not available for the **Assistant** role (see Medical Record).
- Within the Medical Record, the **Alerts** section only shows the **Professional** the alerts they themselves entered, not those of their colleagues.
- The **photo gallery** in the **Diagnosis** tab only shows the **Professional** the photos they themselves uploaded (see Diagnosis).
- In the **Treatments** tab, the **balance and payments** panel is not shown at all to the **Professional** role; only the Manager and Assistant see it, with the full balance and transaction history (see Treatments).
- The **photo gallery** in the **Diagnosis** tab is not available for the **Assistant** role (they always see it empty).
- The **Products** tab does not exist in the mobile app, for any role: registering a product sale to a patient can only be done from the web version (see Patients on mobile).

Frequently asked questions

Why don't I see the "Medical Record" tab?

Because the **Assistant** role does not have access to this tab.

Why do I see different information than a colleague on the same patient's record?

Because several sections of the record are filtered by role or by who recorded the information: diagnosis photos and session alerts show the **Professional** only what they themselves entered, and the balance and payments panel is not shown to this role at all. The **Manager** is the only one who always sees the complete, consolidated information; the **Assistant** sees the full balance but does not have access to the Medical Record or the photo gallery.

Info tab

What is it?

The first tab of the patient record, with their personal and contact details.

Where to find it

Patient record → Record → Info.

What it contains

- **Main details:** first name, last name, date of birth, age (calculated automatically), sex, children, occupation/profession.
- **Contact:** address, city, email, Instagram, country, area code, and phone number.
- **Notes:** free-form notes and comments about the patient.

Step by step

1. Open the patient's record; it opens on this tab by default.
2. Edit any fields you need to update.
3. Click **Save** to confirm the changes.

> 💡 **Tip:** the **First Name** and **Last Name** fields are the only required ones; the rest can be filled in gradually.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** can equally view and edit any patient's information, regardless of who attended to them.

Frequently asked questions

Does the age update on its own?

Yes, it's calculated automatically from the entered date of birth.

Medical Record tab

What is it?

The tab where the patient's medical history and characteristics relevant to aesthetic treatments are recorded.

Where to find it

Patient record → Record → Medical Record.

> This tab is only shown to roles with permission to view patients' medical information.

What it contains

- **BMI:** calculated automatically from the entered weight (kg) and height (m), with its status (Underweight, Normal weight, Overweight, Obesity grade I/II/III).
- **Habits:** diet type (balanced, with dietary restrictions, vegan, vegetarian) and notes.
- **Lifestyle:** lifestyle (active/sedentary), sleep quality, whether they smoke, whether they drink alcohol, sport practiced and frequency.
- **Aesthetic surgeries:** list of previous surgeries (for example, rhinoplasty, abdominoplasty, implants), with time elapsed and notes.
- **Illnesses:** patient's illnesses, associated medication, and notes.
- **Allergies:** to food, metals, cosmetics, plants/animals, and medication.
- **Alerts:** notices that are shown automatically in the Agenda when the patient has an appointment (see Patient alerts and notices).
- **Scars:** type (hypertrophic, atrophic, keloid), area, and notes.
- **Skin:** texture, pores, appearance, comedones, wrinkles, photo damage, biotype, and phototype.
- **Circulatory disorders:** for example, telangiectasia, rosacea, angiomas, erythema; with suggested treatment and notes.
- **Pigmentation:** hyperpigmentation (e.g. melasma, macules) and hypopigmentation (e.g. vitiligo), with time since onset and notes.

Step by step

1. Open the patient's record and go to the **Medical Record** tab.
2. Fill in or edit the relevant sections.
3. Save the changes.

> 💡 **Tip:** you don't need to fill in all sections at once; the patient's medical record can be built up over time.

Access by role

- **Manager:** accesses the full Medical Record for any patient in the business.
- **Professional:** accesses the full Medical Record for any patient in the business (BMI, habits, history, alerts, skin, etc.), with no additional restrictions.
- **Assistant:** this role **does not have access to the Medical Record tab**; it is not shown in the record's menu.

Frequently asked questions

What's the point of entering BMI if I'm not a nutritionist?

It's a general reference value for some aesthetic treatments; it's calculated automatically and is optional to fill in.

Diagnosis tab

What is it?

The tab for the patient's photographic record and diagnosis: reason for consultation, suggested treatment, and a photo gallery.

Where to find it

Patient record → Record → Diagnosis.

What it contains

- **Reason for consultation:** free-form text describing why the patient is seeking consultation.
- **Suggested treatment:** free-form text with the professional's recommendation.
- **Photo gallery:** the patient's diagnosis images, with the ability to add notes and markings to each photo.

Step by step

Filling in the diagnosis

1. Open the patient's record and go to the **Diagnosis** tab.
2. Fill in the **reason for consultation** and the **suggested treatment**.
3. Save the changes.

Uploading a photo

1. Within the **Photo gallery**, click **Upload photo**.
2. Select the image from your device.
3. The photo is added to the patient's gallery. Clicking on it (in the web version) opens the photo editor, with marking tools, measurements, analysis filters, and comparison with other photos of the patient.

Access by role

The patient is shared across the entire business, but **the photo gallery is not**: each role has a different scope over the images. The reason for consultation and the suggested treatment, on the other hand, are shared patient data that all three roles view and edit equally.

- **Manager:** sees all of the patient's photos, regardless of who uploaded them.
- **Professional:** sees **only the photos they themselves uploaded**. If another professional uploaded diagnosis photos for the same patient, the Professional does not see them in their gallery.
- **Assistant:** can access the Diagnosis tab and fill in the reason for consultation and the suggested treatment, but **does not have access to the photo gallery**: they always see it empty and cannot upload or view images, regardless of who uploaded them.

> ⚠️ **Important:** this means that if several professionals attended to the same patient and each uploaded their own photos, no individual Professional sees the full gallery — only the Manager has that consolidated view. The Assistant, for their part, never sees photos in this tab.

Frequently asked questions

Are photos linked to a date?

Yes, each photo is recorded with the date it was uploaded, forming a visual history of the patient over time.

I uploaded photos for a patient and now I can't see them — what happened?

If this is the first time you're checking the gallery after another professional also uploaded photos, remember that each Professional only sees the photos they personally uploaded. If the photos you uploaded don't appear either, check that you're viewing the correct patient's record.

I'm an Assistant and the gallery always appears empty — is this an error?

No, this is expected behavior: the Assistant role does not have access to patients' diagnosis photos.

Common errors

- **The photo won't upload** → check your connection and that the file is a valid image; try again.

Diagnosis photo editor

What is it?

A visual editing and analysis tool that opens when viewing a photo from the **Diagnosis** gallery in detail, with markings, measurements, analysis filters, and photo comparison.

What is it for?

To mark and measure areas of interest directly on the photo (a lesion, an asymmetry, a mark), and to visually compare the patient's progress between two photos from different dates.

Where to find it

Patient record → Diagnosis → Gallery → click on a photo.

> Available only in the web version. In the mobile app, the Diagnosis gallery only lets you view, download, or delete photos; it does not include this editor (see Patients on mobile).

Marking tools

At the bottom of the screen:

- **Magnifier:** zooms in on the area of the photo the cursor hovers over.
- **Free drawing:** draws freehand lines on the image.
- **Circle:** draws a circle to mark a specific area.
- **Measurement:** draws a straight line and, upon release, opens a window to name the measurement (for example, "Interpupillary distance") and enter the measured value (for example, "12.5 mm"). Each saved measurement is listed in the side panel.
- **Erase:** works like an eraser, to remove specific strokes.
- **Crop:** selects a rectangular area and, upon confirming with **Apply Crop**, crops the image to that area.
- **Undo** the last action, or **clear all strokes** (asks for confirmation).
- **Color:** 5 colors available for drawings and markings (red, green, blue, purple, black).

Analysis filters

Designed to highlight different types of skin characteristics on the same photo (they don't modify the original photo, only the view):

- **ORIG:** the image with no filter applied.
- **TEXTURE** (Surface Analysis): highlights enlarged pores, fine wrinkles, scars, and comedones.
- **VASCULAR** (Redness Analysis): ideal for viewing telangiectasia, rosacea, inflammation, and spider veins.
- **NEG** (Hyperpigmentation): helps outline the exact edges of spots, melasma, and lentigos.

Comparing with another photo

1. Click the **Compare** button on the toolbar.
2. Choose, from the patient's photo history, the photo to compare against.
3. Both images are overlaid; drag them to align them.
4. You can select a region and use **Download Area** to save that cropped comparison, or **Exit Comparison** to return to the normal editor.

Detail panel

On the right side of the screen:

- Image **title** (editable).
- Free-form **notes** about the photo.
- **Measurements** saved during editing.
- Button to **show/hide annotations** on the photo (without deleting them).
- Button to **download the image with the annotations** applied.
- **Cancel** (discards the changes) and **Save** (keeps the title, notes, measurements, and markings for the next time this photo is opened) buttons.

Access by role

The editor is available to roles that have access to the Diagnosis gallery and to the particular photo (see Diagnosis):

- **Manager:** can open and edit any diagnosis photo of any patient.
- **Professional:** can open and edit only the photos they themselves uploaded.
- **Assistant:** this role does not have access to the photo gallery, and therefore not to this editor either.

Frequently asked questions

Do the filters modify the original photo?

No, they're just a different way of viewing it within the editor; what's kept when you save are the markings, measurements, title, and notes, not the applied filter.

Can a photo be recovered after cropping it?

The crop is applied to the edited image; if you need the full original photo, check whether you kept an unedited copy before cropping.

Common errors

- **Measurements don't appear in the panel** → confirm the measurement from the "New Measurement" window with the **Save Measurement** button; if the window is closed without saving, the measurement is not kept.

Treatments tab (and payments)

What is it?

The tab where the patient's treatments, sessions, and payment status (balance, recorded payments, and voucher redemption) are managed.

Where to find it

Patient record → Management → Treatments.

Treatment list

- Available filters: **All**, **Active**, **Completed**, **Canceled**.
- For each treatment, the following is shown: name, number of sessions, start date, and status (**In Progress**, **Completed**, **Canceled**).
- Expanding a treatment shows: cost, start date, current session out of the total, **upcoming appointments** scheduled, and the **history of sessions** already completed.

Starting a new treatment

1. Click **New Treatment**.
2. The system checks that treatments have been created in the business's catalog; if none exist, it indicates that treatments must first be created from the **Treatments** module.
3. Select the treatment from the catalog and, if applicable, the **optional add-ons** (checkboxes).
4. If your role is **Manager** or **Assistant**, also choose the **professional responsible** for the treatment (required field for these roles); the Professional role does not see this field, since the treatment is automatically associated with their own user account.
5. Fill in the number of sessions, duration, cost, instructions, and notes.
6. You can add **reference photos** for the treatment (different from the diagnosis photos in the Diagnosis tab); this option is only available after saving the treatment for the first time. Unlike Diagnosis photos, these reference photos **do not have the marking and measurement editor** (see Diagnosis photo editor); they can only be downloaded or deleted.
7. Save to register the treatment in the patient's record.

> ⚠️ **Important:** once the treatment has at least one recorded session, the chosen catalog treatment, the optional add-ons, and the number of sessions become locked and cannot be modified (only duration, cost, instructions, and notes remain editable).

> 💡 **Tip:** from an already-created treatment you can also **Schedule Appointment** directly, without leaving the patient's record.

Balance and payments

In a side panel of this same tab (visible only to enabled roles, see "Access by role" below), the following is shown:

- The patient's **current balance** (credit or debt), calculated based on what was generated by treatments and products, minus recorded payments.
- **Register Payment** button: opens a window to enter a payment, indicating date, amount, payment method, and notes. Dates with the daily cash register already closed cannot be selected: the system disables them on the window's calendar.
- **Voucher** button: lets you enter a voucher (gift certificate) code to apply it as a payment.
- **Recent transactions:** a list of the patient's most recent transactions (payments, treatments, products, vouchers). Payments can be edited from this list.

Treatment list and visibility by sector

If the business has **sectors** configured (see Settings), the list of treatments a **Professional** sees in this tab is limited to treatments recorded within **their own sector**. If the same patient has treatments done in another sector of the business, a Professional from a different sector does not see them in their list. The **Manager** always sees all of the patient's treatments, from any sector.

Access by role

- **Manager:** manages treatments, payments, and vouchers for any patient, with a full view of the balance and transactions.
- **Professional:** can start and edit treatments (limited to those in their own sector, if the business has sectors configured). This role **does not have access to the Balance and payments panel**: they don't see the patient's balance, recent transactions, or have the "Register Payment" or "Voucher" buttons — the entire panel is not shown at all for this role.
- **Assistant:** can start a catalog treatment for a patient and sees the full Balance and payments panel (balance, transactions, registering payments, and vouchers). They cannot, however, create or modify the business's general treatment catalog (that is done from the **Treatments** module).

> ⚠️ If the Professional role needs to register a patient's payment, they must ask the Manager or Assistant, since they do not have that action anywhere in the patient's record (nor in the mobile app, see Patients on mobile).

Frequently asked questions

What does it mean when the balance is negative?

That the patient has an outstanding debt: what was generated by treatments/products is greater than what they've paid so far.

Can a treatment be deleted?

Yes, although the action cannot be undone; the system asks for confirmation before deleting it.

Why don't I see the balance and payments panel on the patient's record?

Because your role is Professional; this financial information is reserved for Manager and Assistant.

Common errors

- **"Invalid or already used voucher code"** → check the entered code; if the voucher has already been redeemed, it cannot be used again.
- **"The voucher is expired or has already been used"** → check the voucher's validity with the business.

History tab

What is it?

A timeline showing all of the patient's recorded activity: treatments started, sessions completed, cancellations, and other relevant events, sorted chronologically.

Where to find it

Patient record → Management → History.

What it shows

Each event in the history shows date, time, type, and status, for example:

- A treatment starting.
- A treatment being canceled.
- A completed session, with the professional who attended it.
- A session plan being added (number of sessions and treatment).

Step by step

1. Open the patient's record and go to the **History** tab.
2. Scroll through the timeline to see the patient's full activity, from most recent to oldest.

Access by role

- **Manager:** sees the full history of any patient, with the activity of every professional who attended to them.
- **Professional:** sees a **partial** version of the history: only treatments from their own sector (if the business has sectors configured) and only sessions they themselves performed. If the patient was also attended to by professionals from another sector, or had sessions with other colleagues, that activity **does not appear** in the history the Professional sees.
- **Assistant:** sees the patient's full history, the same as the Manager.

> ⚠️ **Important:** for this reason, the history a Professional sees may not reflect all of the patient's actual activity at the business. For a complete picture, check with the Manager or review the history from their user account.

Frequently asked questions

Can the history be edited?

No, it's a read-only record that automatically reflects the activity already entered in other tabs (Treatments, Agenda).

Common errors

- **No history available for this patient** → this is normal if the patient doesn't yet have any treatments or sessions recorded.

Products tab

What is it?

The tab for recording the sale of products from the business's catalog to this particular patient.

Where to find it

Patient record → Management → Products.

> This tab exists only in the web version. The mobile app does not have a Products tab in the patient record; to sell products to a particular patient, use a computer or tablet (see Patients on mobile).

Step by step

Selling a product

1. Open the patient's record and go to the **Products** tab.
2. Search for the product in the catalog (name, description, available stock, and price/cost).
3. Add it to the sale cart (**New Sale**), indicating the quantity.
4. Review the summary: subtotal, discount, and total to pay.
5. Select the **payment method** (or "No payment recorded" if it will be collected later).
6. Confirm the sale.

Purchase history

Below the cart, the patient's **purchase history** is shown: product, quantity, price, and total for each sale, with the ability to manage each one from the actions menu.

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** can equally sell products to any patient.

Frequently asked questions

What happens to stock when a product is sold?

It is automatically deducted from the general **Products** inventory.

Can I delete an already-recorded sale?

Yes, from the purchase history; when deleted, the product's stock is automatically returned to inventory.

Common errors

- **The sale can't be confirmed** → check that there is at least one product in the cart and that available stock is sufficient.

Patient alerts and notices

What is it?

A pop-up notice that the system automatically shows when opening the record of a patient who has active alerts, so they don't go unnoticed.

What is it for?

To bring sensitive information about the patient (for example, an allergy) or a reminder left during a previous session to the professional's attention the moment they open the record.

Where these notices come from

Two sources are combined:

1. **General patient alerts:** those entered in the Medical Record tab, **Alerts** section, with their severity level (Information, Warning, Danger).
2. **Session notices:** reminder messages a professional left active in a previous session (see Registering a completed session, "Reminder message" field).

Step by step

1. Open the record of a patient who has active alerts or notices.
2. The system automatically shows a window with the list of notices.
3. Review each notice: description, notes, and source.
4. Close the window to continue viewing the record.
5. If a notice is no longer needed, it can be deleted from that same window.

Access by role

- **Manager:** sees all of the patient's general alerts and all session notices, regardless of which professional entered them.
- **Professional:** sees the patient's general alerts the same as the Manager. However, the **session notices** they see are limited to **their own sessions** with that patient; a notice left by another professional in a session that isn't theirs is not shown to them.
- **Assistant:** this role does not have access to the Medical Record tab; consequently, they also don't see this pop-up notice.

Frequently asked questions

Why does this notice show up every time I open the record?

Because the alert or session notice is still active. General patient alerts remain until edited or deleted from the Medical Record; session notices remain until deleted from this same window.

Common errors

- **A notice was deleted by mistake** → there is no way to recover it; if it was a general patient alert, it can be re-entered from the Medical Record.

Deactivating a patient

What is it?

The action of deactivating a patient in the system, without deleting their history.

What is it for?

To remove from circulation a patient who is no longer part of the business's active client base (for example, because they stopped being a client), while still keeping their entire clinical and payment history.

Where to find it

Patient record → "Deactivate" button.

Step by step

1. Open the record of the patient you want to deactivate.
2. Click **Deactivate**.
3. The system first checks that the patient **does not have an outstanding debt**. If they do, it shows a notice with the amount owed and does not allow you to continue until the situation is resolved.
4. If there is no outstanding debt, the system asks for confirmation.
5. Upon confirming, the patient is deactivated and the record closes.

Access by role

This action is **exclusive to the Manager role**. Neither Professional nor Assistant have the "Deactivate" button available on the patient's record, without exception.

Frequently asked questions

Can a deactivated patient be reactivated?

Deactivation does not delete the patient or their history; to reactivate them, check with support or the account's Manager for the appropriate procedure.

Why don't I see the "Deactivate" button?

Because this action is exclusive to the Manager role. If you need to deactivate a patient and your role is Professional or Assistant, ask the account's Manager.

Why won't it let me deactivate a patient (as Manager)?

Because the patient has an outstanding balance owed. Settle the payment from the Treatments tab before trying to deactivate again.

Common errors

- **"Patient with Outstanding Debt"** → the system blocks deactivation until the patient's balance is settled.

04

Treatments

MODULE 04

Treatments — Overview

What is this module?

The **Treatments** module is the business's general catalog of services offered: each treatment defines its base cost, duration, number of sessions, optional add-ons, and supplies it consumes. This catalog is the basis from which treatments are started for specific patients (see Patient treatments).

Who is it for?

For all three roles, with notable differences:

- **Manager:** the only role that can create, edit, and delete catalog treatments, and the only one that can assign sectors to them.
- **Professional:** can only view the catalog, limited to treatments in **their own sector** (if the business has sectors configured).
- **Assistant:** views the entire catalog, from all sectors, but also cannot create or edit it.

Features

- The treatment catalog
- Creating or editing a treatment
- Add-ons / extras
- Supplies (operating costs)
- Deleting a treatment

The treatment catalog

What is it?

The module's main screen, with the list of all treatments the business offers, general indicators, and a ranking of the best-performing treatments.

Where to find it

Sidebar menu → Treatments.

What it shows

- **General indicators:**
  - **Total Active:** number of treatments currently active in the catalog.
  - **Best Seller:** the treatment with the highest number of sales in the last 30 days.
  - **Average Ticket:** the average sale value over the last 30 days.
- **Top Performance:** a ranking of the treatments with the best revenue, with their relative percentage.
- **General List:** a table with each treatment's name/category, base cost, duration, and number of sessions.
- **Search box**, by treatment name.
- **Filter by sector** (if the business has sectors configured), to view only the treatments available in a given sector.

Step by step

1. Go to **Treatments**.
2. Use the search box or the sector filter to find a specific treatment.
3. Click on a treatment to see its full details (see Creating or editing a treatment).

Access by role

- **Manager:** sees the full catalog, from all sectors, with all indicators.
- **Professional:** sees only the treatments in **their own sector** (if the business has sectors configured); if no sectors are configured, they see the full catalog.
- **Assistant:** sees the full catalog, from all sectors, the same as the Manager.

Frequently asked questions

Why do I see fewer treatments than a coworker with a different role?

If your role is Professional, the catalog you see is limited to the treatments available in your sector.

Common errors

- **"Error Loading Treatments"** → use the **Retry** button; if the problem persists, it may be a connection issue.

Creating or editing a treatment

What is it?

The **Configure Treatment** window, where a treatment in the business's catalog is defined or modified.

Where to find it

- The **"New Treatment"** button, in the **Treatments** module header.
- Clicking on an existing treatment in the list, to edit it.

What is filled in

- **Treatment Name.**
- **Assigned Sectors:** which sectors of the business this treatment is available in (only if the business has sectors configured).
- **Base Cost ($).**
- **Duration (min).**
- **No. of Sessions.**
- **Add-ons / Extras** (see Add-ons).
- **Supplies** consumed by the treatment (see Supplies).

Step by step

1. Click **New Treatment** (or click on an existing treatment to edit it).
2. Fill in the **name**, the **base cost**, the **duration** in minutes, and the **number of sessions**.
3. If applicable, check the **sectors** it will be available in.
4. Add **add-ons** and **supplies**, if applicable.
5. Save the changes.

System validations

- The base cost cannot be negative.
- The duration must be greater than 0 minutes.
- The number of sessions must be greater than 0.

> 💡 **Tip:** businesses on the basic subscription plan may have a limit on the number of treatments in the catalog; if the limit is reached, the system offers the option to upgrade the plan.

Access by role

This action is **exclusive to the Manager role**. Neither Professional nor Assistant can create or edit treatments in the general catalog.

> ⚠️ The **sectors assigned** to a treatment, specifically, can only be changed by the Manager — the system itself indicates this in the window: *"Only the Manager can modify the assigned sectors."*

Frequently asked questions

Why don't I see the "New Treatment" button?

Because this action is exclusive to the Manager role.

Common errors

- **"Cost must be greater than or equal to zero"**, **"duration must be greater than zero"**, **"number of sessions must be greater than zero"** → check the entered values before saving.

Add-ons / extras

What is it?

Additional items that can be added to a treatment when scheduling an appointment, without needing to create a new service in the catalog.

What is it for?

It allows you to increase the average ticket per session by offering extras (for example, an LED mask or an additional ampoule) on top of an existing treatment.

Where to find it

Treatments → New/Edit Treatment → "Add-ons / Extras" section.

What is filled in for each add-on

- **Name** of the add-on.
- **Cost ($)** it adds to the treatment.
- **Time (+)**: additional minutes it adds to the appointment's duration.

Step by step

1. Within the treatment configuration window, fill in the add-on's name, cost, and time.
2. Click **Add**.
3. The add-on is listed; it can be removed with the corresponding button before saving.
4. Save the treatment to confirm the added add-ons.

Once saved, these add-ons can be selected when scheduling an appointment for that treatment (see Scheduling an appointment).

Access by role

This action is **exclusive to the Manager role**, like the rest of the treatment configuration.

Frequently asked questions

Do add-ons have their own number of sessions?

No, they are added to a specific session of the main treatment; they do not generate their own session plan.

Supplies (operating costs)

What is it?

The list of internal-use products ("supplies") that a treatment consumes **over the course of its entire session plan**, which the system uses to calculate its actual operating cost and to automatically deduct stock as sessions are completed.

What is it for?

It lets you know how much it costs the business to carry out a treatment (beyond the price charged to the client), estimate the profit margin, and keep the supplies inventory up to date without manually entering consumption session by session.

Where to find it

Treatments → New/Edit Treatment → "Supplies (Operating Costs)" section.

Step by step

1. Search for the **supply**-type product by name, in the **"Search Supply Product"** search box.
2. Select the product from the results.
3. Enter the **quantity** and the **unit of consumption** (for example, milliliters, if the product is purchased in a larger container and consumed in parts).
4. Click **Add**.
5. The supply is added to the list, marked with the **Auto-Stock** badge.

> ⚠️ **Important — what the entered "Quantity" means:** the quantity entered here **is not what's consumed in each session**, but rather the **total consumed by the entire treatment**, divided equally among the treatment's number of sessions. For example, if you enter a quantity of **10 ml** for a treatment with **5 sessions**, the system deducts **2 ml for each session completed** (10 ÷ 5), not 10 ml per session.

When stock is deducted

The supply deduction from inventory **does not happen when the treatment is saved or when an appointment is scheduled**: it happens automatically each time a session is registered as completed. At that moment, the system:

1. Calculates the portion corresponding to that session (total supply quantity ÷ number of sessions in the treatment).
2. Deducts that portion from the supply product's **stock**.
3. Records the transaction in the **Supply Consumption** history (see Expenses and supplies in Finance), with its proportional cost.

Each session deducts stock **only once**: if an already-completed session is edited again, the system does not deduct the supply a second time.

Total cost and estimated margin (in the treatment configuration window)

- **Total Operating Cost:** the sum of the cost of **all** the supplies entered (the total quantity for the entire treatment, not per session), based on their quantity and unit of consumption.
- **Estimated Margin:** the difference between the treatment's **Base Cost** and the **Total Operating Cost** of its supplies. Since the Base Cost is also the price of the entire treatment (not per session), this comparison is consistent: both numbers represent the total for the full plan.

Access by role

This action is **exclusive to the Manager role**, like the rest of the treatment configuration.

Frequently asked questions

Why is the unit of consumption different from the product's purchase unit?

Because many products are purchased in a large container (for example, a liter) but consumed in small amounts (for example, milliliters) in each session. The system automatically converts between the two units to calculate the actual cost per use.

Where do the products available to choose as a supply come from?

From the **Products** module catalog, filtered to those entered with the **Supply** category.

If I enter 10 ml of a supply and the treatment has 5 sessions, is 10 ml deducted at each session?

No. The 10 ml is the total for all 5 sessions combined: 2 ml is deducted for each session registered as completed.

What happens if the patient ends up doing more or fewer sessions than originally planned?

The system always divides the entered quantity by the number of sessions **defined in the treatment**, not by the sessions actually completed. If the plan changes, review the treatment's configuration so the cost and supply usage reflect reality.

Common errors

- **"Quantity must be greater than 0"** → enter a valid quantity before adding the supply.

Deleting a treatment

What is it?

The action of removing a treatment from the business's general catalog.

Where to find it

Treatments → open the treatment → "Delete" button.

Step by step

1. Open the treatment you want to delete.
2. Click **Delete**.
3. Confirm the action in the warning message.

Access by role

This action is **exclusive to the Manager role**, like the rest of the catalog configuration.

Frequently asked questions

Can a treatment be deleted if patients already have it started?

Caution is advised: deleting a treatment from the catalog does not delete treatments already started by patients (see Patient treatments), but it prevents starting new treatments of that type from that point forward.

Common errors

- If the deletion is not reflected immediately in the list, refresh the page.

05

Products

MODULE 05

Products — Overview

What is this module?

The **Products** module is the business's catalog and inventory: products sold to clients, internal-use supplies (those consumed in treatments), and vouchers (gift certificates). Sales to patients and purchases/stock replenishment are also recorded from here.

Who is it for?

For all three roles, with significant differences:

- **Manager:** the only role that can create, edit, or delete catalog products (of any category), and the only one that sees and manages the **Supplies** category.
- **Professional:** can view and sell **Sale** and **Voucher** products, but does not see the **Supplies** category, cannot edit the catalog, and cannot register purchases (stock replenishment).
- **Assistant:** can view all three categories (including Supplies) and sell products, but also cannot edit the catalog; they can register purchases.

Features

- The product catalog
- Creating or editing a product
- Selling products to a client
- Registering a purchase (stock replenishment)
- Active vouchers

The product catalog

What is it?

The module's main screen, with the list of all the business's products: those sold to clients, internal-use supplies, and vouchers.

Where to find it

Sidebar menu → Products.

What it shows

- **Category tabs:** All, Sale, Supplies (visible only to those with permission), Vouchers.
- **Search box**, by name or description.
- **Stock filter:** All, Low Stock, Out of Stock.
- **Grid View / List View:** two ways to display the catalog.
- Each product shows its image, name, description, available stock, and price/cost.
- A **voucher/ticket** icon, with the number of active vouchers, which opens the list of Active vouchers.

Step by step

1. Go to **Products**.
2. Use the category tabs, the search box, or the stock filter to find a product.
3. Switch between grid and list view according to your preference.
4. Click on a product to view/edit it, or add it directly to the cart for a sale (see Selling products).

Access by role

- **Manager:** sees all three categories (Sale, Supplies, Vouchers) with no restrictions.
- **Professional:** sees **Sale** and **Vouchers**, but **never** sees the **Supplies** category.
- **Assistant:** sees all three categories, including Supplies, the same as the Manager.

Frequently asked questions

Why don't I see the "Supplies" tab?

Because the Professional role does not have access to this category; it is reserved for Manager and Assistant.

Common errors

- **The catalog won't load** → check your connection; inactive products are not shown in the list.

Creating or editing a product

What is it?

The window for registering or modifying a product in the business's catalog.

Where to find it

- The **"New Product"** button, in the Products module header.
- Clicking on an existing product in the catalog, to edit it.

What is filled in

- **Product Name** and **Description**.
- **Product Type:** Sale Product, Supply, or Voucher.
- **Cost** and **Sale Price** (for vouchers, the cost is automatically set to $0).
- **Purchase Unit**, and **Current Stock / Minimum Stock** (to alert when stock is low). Vouchers do not track stock.
- **Content Configuration** (only for supplies purchased by unit, e.g. a bottle): lets you specify how much divisible content each purchased unit has (for example, that a 1-unit bottle equals 500 ml), to correctly calculate the cost per use in treatments.
- Product **image**.

Step by step

1. Click **New Product** (or click on an existing product).
2. Fill in the name, product type, cost, sale price, and purchase unit.
3. If the product is a supply purchased in a divisible container, fill in the content configuration.
4. Enter the current stock and the minimum alert stock.
5. Optionally, upload an image.
6. Save the changes.

Critical changes (type or unit)

If you edit a product that is already linked as a supply to one or more treatments, and you change its **type** or its **unit of measurement**, the system shows you the list of affected treatments and asks for confirmation before applying the change, since it unlinks the product from those treatments.

Automatically generated inventory transactions

- When **creating** a product with an initial stock greater than zero, the system automatically generates a transaction of type **"Initial balance"** in the inventory history.
- When **editing** an existing product and manually changing the **Current Stock** field, the system detects the difference and automatically generates an **"Adjustment"** transaction (inbound or outbound, depending on whether stock went up or down), later visible in Inventory and purchases.

Access by role

Creating, editing, and deleting products (of any category: Sale, Supply, or Voucher) is an action **exclusive to the Manager role**. Neither Professional nor Assistant have the "New Product" button, nor can they edit an existing product.

Frequently asked questions

Why don't I see the "New Product" button?

Because this action is reserved exclusively for the Manager role.

Common errors

- **"Cost must be greater than or equal to zero"**, **"price must be greater than or equal to zero"**, **"stock cannot be negative"** → check the values before saving.
- **"Name cannot exceed 80 characters"** → shorten the product name.

Selling products to a client

What is it?

The process of recording the sale of one or more catalog products to a patient, using the built-in shopping cart.

Where to find it

Sidebar menu → Products → "Sale" mode (the cart's default mode, to the right of the catalog).

Step by step

1. Click on the products you want to sell; they are added to the cart.
2. Adjust the **quantity** of each product, if applicable.
3. Select the **Patient / Client** the sale is being made to (required field).
4. If the patient has previous purchases, their **Recent Purchases** history is shown, from which you can re-add a previously purchased product.
5. Apply a **discount**, if applicable.
6. Choose the **Payment Type** (or "No payment recorded" if it will be collected later) and the amount.
7. Click **Complete sale**.

System validations

- Does not allow selling more units than are in stock (except vouchers, which do not track stock).
- If "No payment recorded" is selected, the system asks for confirmation before processing the sale.
- If the day's cash register is already closed, the sale is automatically recorded for the following day.

Access by role

Available equally for all three roles: **Manager**, **Professional**, and **Assistant** can sell products (from the categories each one has visible) to any patient.

Frequently asked questions

What happens to stock after a sale?

The sold quantity is automatically deducted from the product's inventory (except vouchers, which do not track stock).

What happens if I sell a Voucher-category product?

The system automatically generates a voucher for each unit sold, with a unique code and a fixed expiration date of **one month** from the sale (see Active vouchers). If the product has an image uploaded, the voucher is also generated as a downloadable image to hand to the client.

Can I sell a product without recording payment at that moment?

Yes, by selecting "No payment recorded"; the system asks for confirmation before continuing.

Common errors

- **"Insufficient stock"** → reduce the requested quantity or replenish stock from Registering a purchase.
- **"You must select a patient"** → every sale requires an associated patient.

Registering a purchase (stock replenishment)

What is it?

Recording a purchase of products from a supplier, which increases the available stock in the business's inventory.

Where to find it

Sidebar menu → Products → cart → "Purchase" mode.

Step by step

1. Switch the cart to **Purchase** mode.
2. Add the purchased products and their corresponding quantities.
3. Fill in the **Supplier** (required) and, optionally, **Notes** about the purchase.
4. Choose the **payment method**.
5. Click **Complete purchase**.

System validations

- The Supplier field is required.
- A payment method must be specified.
- If the day's cash register is already closed, the purchase is automatically recorded for the following day.

Access by role

- **Manager:** can register purchases.
- **Professional: cannot** register purchases; "Purchase" mode is not available for this role.
- **Assistant:** can register purchases, the same as the Manager.

Frequently asked questions

Why can't I switch to "Purchase" mode?

Because the Professional role does not have access to this feature.

What happens to stock after registering a purchase?

The purchased quantity is automatically added to the product's inventory.

What happens to the product's cost after registering a purchase?

The product's **cost** is automatically updated to the unit price entered in that purchase (not accounting for any discount applied, if any). It's not an average between the old and new cost: **the latest purchase price directly replaces** the cost the product had on file. This affects the estimated margin of treatments that use that product as a supply (see Supplies) and the inventory value shown in Finance.

Common errors

- **"You must specify a supplier"** → fill in the field before completing the purchase.
- **"You must select a payment method"** → choose a payment option before continuing.

Active vouchers

What is it?

A panel with the list of all sold vouchers (gift certificates) that are still valid, not yet redeemed.

Where to find it

Sidebar menu → Products → voucher/ticket icon (top right, showing the number of active vouchers).

What it shows

For each active voucher:

- Product/voucher, client it was sold to.
- Issue date and expiration date.
- Amount and voucher code.
- Button to **download the voucher** as an image, if it has an associated image.

> ⚠️ **Important:** every sold voucher automatically expires **one month from its issue date**, without exception. This period is not configurable in the system.

Step by step

1. Click the voucher/ticket icon.
2. The **Active Vouchers** panel opens.
3. Click **Download Voucher** to get the voucher's image and share it with the client.

Access by role

Available equally for all three roles: **Manager**, **Professional**, and **Assistant** see the same list of active vouchers, since Voucher-type products are shared across all roles.

How a voucher is used

A voucher is sold like any other product from the cart (see Selling products). To redeem it as a form of payment for a treatment, its code is entered from the patient's record (see Patient treatments).

Frequently asked questions

What happens when a voucher expires?

It stops appearing in the list of active vouchers. Remember that all vouchers expire one month after being issued.

Can a voucher's expiration date be extended?

No, the one-month period is applied automatically when it's created and there is no on-screen option to change it.

Common errors

- **"No image"** → that voucher has no associated image to download.

06

Finance

MODULE 06

Finance — Overview

What is this module?

The **Finance** module holds all of the business's financial information: revenue, expenses, supply consumption, professionals' commissions, inventory/purchases, and patients' running accounts (debts). Data is viewed month by month, with a period selector in the header.

Who is it for?

Unlike other modules, **access here is not based on configurable permissions but directly on the role**, and it varies quite a bit from one to another:

- **Manager:** full access to **all** tabs, with no restrictions.
- **Assistant:** access to almost the entire module (Overview, Sales & Analysis, Expenses & Supplies, Daily Cash Register, Inventory & Purchases, Running Accounts), **except Commissions**, which is exclusive to the Manager.
- **Professional:** very limited access — only sees the **Sales & Analysis** tab (with less detail than Manager/Assistant) and **Supply Consumption** (a reduced version of Expenses & Supplies, limited to their own consumption). Does not see Overview, Daily Cash Register, Commissions, Inventory, or Running Accounts.

Features

- Overview
- Sales and analysis
- Expenses and supplies
- Daily cash register
- Commissions
- Inventory and purchases
- Running accounts (debtors)

Overview

What is it?

The main tab of Finance, with an executive summary of the business's financial status for the selected month.

Where to find it

Sidebar menu → Finance → "Overview" tab.

What it shows

- **Month selector**, with arrows to navigate between periods (does not allow moving forward to future months).
- Five indicator cards:
  1. **Total Sales** for the selected month: the value of treatments and products **recorded** that month (whether collected or not; the same criterion as "Estimated revenue" on the Dashboard).
  2. **Expenses/Costs** for the selected month (see details below).
  3. **Net Profit** = Total Sales – Expenses/Costs.
  4. **Revenue (Payments)**: unlike "Total Sales," this card is **money actually collected** during the selected month (recorded payments, not what was billed).
  5. **Outstanding**: the total debt pending collection from **the entire client base as of today**. Unlike the other four cards, **this one does not change based on the selected month** — it always shows the current accumulated debt, regardless of which period you're viewing on the rest of the screen.
- **Revenue by Client**: a pie chart with the 5 clients who generated the most revenue in the period, and an "Other" group with the remaining clients.
- **Annual Trend**: an area chart with revenue and expenses month by month over the last year.

What "Expenses/Costs" includes

It's not only what's entered manually in Operating Expenses. It also automatically adds:

1. The cost of **supplies consumed** in treatment sessions.
2. The cost of **supplies recorded as manual consumption**.
3. The cost of **sale products** actually sold that month.
4. The **variable commissions accrued** by professionals for treatments and products sold that month — even if not yet settled (paid) in Commissions.

Since "Expenses/Costs" already includes the actual cost of what was sold and the commissions generated, **Net Profit** reflects the business's real earnings, not just the result of subtracting administrative expenses.

⚠️ **Important — how to read the trend percentage:** the percentages next to **Total Sales** and **Expenses/Costs do not compare the selected month against the previous month**. Both always compare the **last 30 days from today** against the **average of the 3 months prior to today**, regardless of which month is selected in the panel. This means that if you navigate to a past month, the large number does change to reflect that month, but the trend percentage next to it remains the same "as of today" indicator — it is not that specific month's trend.

💡 Also, when the selected month is the current month, the **Revenue by Client** chart uses the **last 30 days** (not the calendar month from day 1); for past, already-closed months, it does use the full calendar month. That's why, in the current month, the sum of the client chart may not exactly match the "Total Sales" figure (which always uses the full calendar month).

Step by step

1. Go to **Finance** (this tab opens by default for Manager and Assistant).
2. Use the ‹ › arrows to change months, or click the month name to choose a specific one from the calendar.
3. Review the indicators and charts for the selected period.

Access by role

This tab is available for **Manager** and **Assistant**. The **Professional** role does not have access to this tab (their access to Finance is limited to Sales and analysis and Supply consumption).

Frequently asked questions

Why can't I move forward to next month?

The system does not allow viewing future months, since they would not yet have data.

What's the difference between "Total Sales" and "Revenue (Payments)"?

"Total Sales" is the value of what was billed (treatments and products recorded), whether collected or not. "Revenue (Payments)" is the money that was actually collected in the period. If a patient buys a treatment on credit, that amount adds to "Total Sales" that month, but it will only add to "Revenue (Payments)" the month it is actually paid.

Why doesn't "Outstanding" change when I navigate to a previous month?

Because that card always shows the total accumulated debt of all clients **as of today**, not the debt generated in the month you're viewing.

Why does "Expenses/Costs" show a higher amount than the sum of my manually entered expenses?

Because that number also automatically includes the cost of consumed supplies (per session and manual), the cost of products sold, and the commissions professionals have already generated that month (even if not yet settled) — it is not only what's entered manually in Operating Expenses.

I already settled a professional's commission — is it counted twice in "Expenses/Costs" (once as accrued commission and again as the Expense generated by the settlement)?

It shouldn't be: when settling, the system only generates an Expense for the **fixed portion** of the settlement (plus any manual adjustment), precisely to avoid duplicating the variable portion, which is already counted here as accrued commission (see Commissions).

Why doesn't the trend percentage change when I navigate to a previous month?

Because that percentage is always calculated using the last 30 days and the average of the last 3 months **counted from today**, not from the month you're viewing on screen. To compare a specific month against the previous one, use the Annual Trend or check the month-by-month amounts manually.

Sales and analysis

What is it?

A detailed analysis of the business's sales for the selected month, with general indicators, rankings of treatments/products/clients, and the breakdown of costs, margins, and behavior for each one.

Where to find it

Sidebar menu → Finance → "Sales & Analysis" tab.

What it shows

- **General indicators:** Total Sales, Gross Profit, Margin on Sales, and Average Ticket for the period.
- A filter to view the ranking by **Treatment**, **Product**, or **Client**.
- **Treatment Status:** active/in progress and completed.
- **Session Management:** completed, pending, and participation by treatment.

Detail when expanding a treatment (Manager and Assistant)

- **Cost and Margin Structure:** supply cost, professional's commission, and net profit — both the period total and the unit value (per session).
- **Margin %** on what was sold.

Detail when expanding a product (Manager and Assistant)

- **Cost Structure:** unit cost (average and replacement), commission, and average net unit profit.
- **Availability:** current stock, quantity remaining until minimum stock, and a visual status — **Critical** (at or below minimum), **Low** (up to 1.5 times the minimum), or **Normal**.
- **Sales Velocity:** how many days on average between each unit sold, and a projection of units to sell next month based on the trend of recent months.

Detail when expanding a client (Manager and Assistant)

- **Account Status:** current balance, status (**Outstanding debt** or **Up to date**), and days overdue, if applicable.
- **Consumption Profile:** the percentage of their purchases that corresponds to treatments versus products, and an automatic classification: **Diverse Client** (tried more than one type of treatment) or **Specialized Client** (concentrated on a single type).
- **Loyalty and Value:** average ticket, visit frequency (how many days on average between visits) and **Lifetime Value** (the total historical amount spent by that client at the business, not only in the selected period).
- **History** button, which opens the client's full transaction detail in a side window.

Step by step

1. Go to **Finance** (this is the default tab for the Professional role).
2. Choose to view the ranking by **Treatment**, **Product**, or **Client**.
3. Click on an item to see its expanded detail (available only for Manager and Assistant).
4. On a client, use the **History** button to see their full transaction detail.

Access by role

- **Manager and Assistant:** see the full detail when expanding any treatment, product, or client (costs, margins, availability, profile, and loyalty).
- **Professional:** sees the general indicators and rankings, but **cannot expand the detail** of any treatment, product, or client — those rows do not expand for this role.

Frequently asked questions

Why does nothing happen when I click on a treatment, product, or client?

If your role is Professional, the expanded detail is not available for this role; you can only view the general indicators and rankings.

What does "Diverse Client" or "Specialized Client" mean?

It's an automatic classification based on how many different types of treatment that client tried: more than one marks them as "Diverse"; only one, as "Specialized."

Is "Lifetime Value" what was spent this month?

No, it's the total historical amount that client has spent at the business since becoming a patient, not only in the period selected on screen.

Expenses and supplies

What is it?

The tab where the business's operating expenses are recorded and the consumption of supplies (internal products) used in treatments is viewed.

Where to find it

Sidebar menu → Finance → "Expenses & Supplies" tab (for the Professional role, this same tab is called **"Supply Consumption"**).

Sub-tabs

Operating Expenses

- A list of expenses recorded in the period, with concept/notes.
- **New Expense** button, to enter an expense: date, amount, payment method, concept, and notes (optional).
  - **"Voucher"** checkbox: check this when the expense is actually a **cash advance pending reconciliation** (for example, cash given to someone to make a purchase), rather than an already closed and documented expense. Expenses marked as "Voucher" appear in the **Pending vouchers** list in Daily cash register until their return is recorded.
- Each expense can be edited or deleted, unless it falls on a date whose **cash register is already closed** (see Daily cash register).

Supply Consumption

- A summary of each supply's usage: total quantity consumed and total cost, with the number of transactions that month.
- **Register Consumption** button, to manually enter a supply's usage (apart from the automatic deduction already generated by treatments): product, quantity, date, and a **Reason** — Internal Use, Breakage, Expiration, Stock Error, or Other.
- When viewing a supply's detail, its transaction history distinguishes the origin of each one: **"Treatment"** (deducted automatically when a session is registered) or **"Manual"** (entered by hand from here).
  - Transactions of **"Treatment"** origin **cannot be edited or deleted** from this screen.
  - **"Manual"** transactions **can be edited or deleted**; when deleted, the supply's stock is automatically restored.

Access by role

- **Manager and Assistant:** see both sub-tabs, **Operating Expenses** and **Supply Consumption**, with the total operating expenses for the entire business.
- **Professional:** the tab is shown directly as **"Supply Consumption"** and is fixed on that view; they do not have access to the business's **Operating Expenses**.

Frequently asked questions

Why don't I see "Operating Expenses"?

Because the Professional role only has access to supply consumption information, not the business's general expenses.

What happens if I delete a consumption record?

The corresponding supply's stock is automatically restored to inventory.

Common errors

- **An expense can't be edited or deleted** → check that the date doesn't fall on an already-closed daily cash register.

Daily cash register

What is it?

The daily record of all the business's money transactions (income and expenses), organized by payment method, with the ability to close the register at the end of the day.

Where to find it

Sidebar menu → Finance → "Daily Cash Register" tab.

What it shows

- **Date** selector (current day by default).
- **Total Balance for the Day**, broken down by each payment method (cash, transfer, card, etc.), with income and expenses for each one.
- **Transaction Detail**: category, concept, person responsible, payment method, and amount for each transaction of the day, with the option to export.
- **Register Expense** button, to enter an outgoing payment directly from this screen.
- **Vouchers** button, which opens the list of **cash vouchers pending reconciliation** (cash advances given to someone; see below).
- **Close Register** button for the day.

Step by step

Checking a day's register

1. Go to **Finance → Daily Cash Register**.
2. Select the desired date with the calendar icon.
3. Review the balance by payment method and the transaction detail.

Closing the day's register

1. Verify that all of the day's transactions have been entered.
2. Click **Close Register**.
3. Confirm the action in the warning message.

> ⚠️ **Important:** once a date's register is closed, **transactions from that day cannot be recorded or modified** (sales, expenses, payments, supply consumption). If an operation is attempted on a date with a closed register, the system automatically records it for the following day.

Cash vouchers (cash advances pending reconciliation)

A **cash voucher** is an expense marked with the **"Voucher"** option when recorded (see Expenses and supplies) — for example, money given to someone to make a purchase, whose reconciliation (the receipt or the change) is still pending. It has no relation to the **product vouchers** sold to patients (see Active vouchers); these are two different concepts that share the name "voucher."

1. Click the **Vouchers** button to see the list of vouchers pending reconciliation, with their concept, date, amount, and person responsible.
2. For each voucher, you have two options:
   - **Return:** records that the money (or the corresponding receipt) was reconciled. Fill in the date, the payment method, and, optionally, a note, and confirm.
   - **Convert to Expense:** if reconciliation ultimately doesn't apply (for example, it's confirmed to have been a regular expense), this option removes it from the pending list and records it as a regular expense.

Access by role

This tab is available for **Manager** and **Assistant**. The **Professional** role does not have access to the Daily Cash Register.

Frequently asked questions

Can an already-closed register be reopened?

There is no on-screen option to do this; if you need this, contact support.

Common errors

- **"Error closing register"** → try again; if the problem persists, check your connection.

Commissions

What is it?

The calculation of each professional's earnings: fixed cost (base salary), variable commission based on productivity (treatment and product sales), and each one's payment status.

Where to find it

Sidebar menu → Finance → "Commissions" tab.

What it shows

- **Total Commissions** for the month, marked as **"Projected"** (it's an estimate calculated with the month's current data, not a closed amount) and **Fixed Costs** (monthly base salaries).
- **Variable (Sales):** the total productivity-based commissions generated in the period.
- **Professionals to be paid:** number of professionals with pending payments.
- **Monthly Settlement:** a table with each professional, their fixed part, their variable part for treatments and for products, the total, and the status (Paid/Settled or Pending).
- **Breakdown by Professional** and **Historical Trend** (last 12 months).

How each professional's amount is calculated

Using the data entered in Settings → Team for each professional (Fixed Cost, frequency, commission %), the system calculates, for the selected month:

- **Fixed part:**
  - If the fixed cost was entered as **Monthly**, that same amount is used.
  - If it was entered as **Weekly**, the system multiplies it **by 4** to get the monthly equivalent (it does not calculate the actual number of weeks in the month, it's always a fixed 4 weeks).
- **Variable for Treatments:** the configured commission percentage, applied to the **total cost of the treatments that professional started during the month** (by the treatment's start date, not by sessions completed nor by what was actually collected from the patient).
- **Variable for Products:** the configured commission percentage, applied to the total of products (price × quantity) that professional sold during the month.
- **Total:** the sum of the three previous parts.

> ⚠️ **Important regarding Treatment commission:** it is calculated on the **treatment's full cost in the month it was started**, it is not prorated across sessions as they take place. If a professional starts a multi-session treatment in January that extends into March, the entire commission for that treatment is calculated in **January's** settlement.

Step by step: settling a commission

1. In the **Monthly Settlement** table, find the professional with **Pending** status.
2. Click **Settle**.
3. Confirm the **period**, the **payment date**, the **amount to settle**, and the **payment method**.
4. Note the system's notice: this action generates an **Expense** for the fixed part plus any adjustments; the variable part is not duplicated as an expense, because it is already deducted as cost of sale in the financial summary.
5. Confirm the settlement.

> ⚠️ If the **daily cash register** for the payment date is already closed (see Daily cash register), the button to confirm the settlement remains disabled until a date with an open register is chosen.

Access by role

This tab is **exclusive to the Manager role**. Neither Professional nor Assistant have access — if access is attempted another way, the system shows the message: *"Unauthorized Access: You do not have the necessary permissions to view this section. Only business administrators and managers can access commissions."*

Frequently asked questions

Why doesn't the variable commission also appear as a separate expense when settled?

Because the system already accounts for it as cost of sale within the general financial summary; including it as an expense as well would duplicate its impact on net profit.

If a professional's fixed cost is weekly, how is the monthly amount calculated?

By multiplying that weekly value by 4, always, regardless of how many weeks the calendar month actually has.

Is the treatment commission calculated per session or per full treatment?

Per full treatment, in the month it was started. It is not accumulated session by session as the patient attends.

Common errors

- **"Unauthorized Access"** → this tab is exclusive to the Manager role.

Inventory and purchases

What is it?

A financial view of the business's inventory: current stock value, the month's merchandise inflows and outflows, and the transaction history for each product (purchases, sales, internal consumption).

Where to find it

Sidebar menu → Finance → "Inventory & Purchases" tab.

What it shows

- **Current Stock Value**, broken down by **Sale** products and **Supplies**.
- **Inflows** (the month's purchases) and **Outflows** (the month's outgoing stock, at cost price), each with its trend compared to the previous month.
- **Transactions:** a table by product, with total quantity, average price, and total.
- **Transaction Summary:** the detail of each transaction, with date, supplier or client (as applicable), or the indication **Internal Consumption** if the product was used in a treatment.

Step by step

1. Go to **Finance → Inventory & Purchases**.
2. Review the stock value and the month's inflow/outflow trend.
3. Check a specific product's transaction detail to see its full history.

Access by role

This tab is available for **Manager** and **Assistant**. The **Professional** role does not have access to Inventory & Purchases (their view of supplies is limited to Supply Consumption).

Frequently asked questions

What's the difference with the "Supply Consumption" tab a Professional sees?

"Supply Consumption" shows only the use of supplies in treatments. "Inventory & Purchases" is a broader financial view, which also includes purchases from suppliers and product sales, with the total stock value.

Running accounts (debtors)

What is it?

The panel for managing clients' outstanding balances: who owes money to the business, who has a credit balance, and for how long.

Where to find it

Sidebar menu → Finance → "Running Accounts" tab.

What it shows

- **Total Owed** by all clients, with its change compared to the previous month.
- **Critical Debt (+90 days)**: the amount and percentage of the portfolio more than 90 days overdue.
- **Debtor Clients**: number of clients with an outstanding balance, out of the total client base.
- **Average delay**, in days.
- A list of clients with: status (up to date / with outstanding debt), last transaction, age, and total balance.
- **Filters:** All, Debtors, Credit balances. Search box by client name.
- General **Export** button, to export the entire list shown on screen.

Detail when clicking on a client

A side panel opens with:

- The client's **Current Balance** and, if in debt, its **maximum age** in days.
- **Debt Composition**: the list of specific unpaid charges (treatment or product, date and amount of each one) — that is, exactly where the debt comes from.
- **Debt Age**:
  - **Oldest Debt**: the amount and date of the oldest unpaid charge, with its age in days.
  - **Most Recent Debt**: the amount and date of the newest unpaid charge, with its age in days.
  - **Distribution by Age**: the total owed grouped into four ranges — 0–30 days, 31–60 days, 61–90 days, and +90 days.
- Direct access to **View patient record**, to register a payment (see Patient treatments).
- **Print** button, which downloads the client's account statement as a PDF.

Step by step

1. Go to **Finance → Running Accounts**.
2. Use the filters or the search box to find a client.
3. Click on a client to see their debt detail.
4. From there, go to **View patient record** to register a payment, or use **Print** to download their account statement as a PDF.

Access by role

This tab is available for **Manager** and **Assistant**. The **Professional** role does not have access to Running Accounts (although they can see a specific patient's balance from their record).

Frequently asked questions

What is considered "critical debt"?

A client's debt that is more than 90 days overdue and unresolved.

07

Marketing

MODULE 07

Marketing — Overview

What is this module?

The **Marketing** module lets you analyze patient behavior, build segmented groups, and send them WhatsApp campaigns with images and promotional text, in bulk and at no cost per message.

> This module is **only available in the web version**; it does not exist in the mobile app (see General differences in the mobile app).

Who is it for?

This module is **exclusive to the Manager role**. Neither Professional nor Assistant have access to Marketing: the link is not even shown in the sidebar menu for those roles.

Plan requirement

Marketing requires a **Professional plan or higher** subscription. If the business has the basic plan, a promotional screen inviting them to upgrade the plan is shown instead of the module.

Features

- Insights (patient analysis)
- Image repository
- Patient groups
- WhatsApp campaigns

Insights (patient analysis)

What is it?

An analysis panel with indicators about the business's patient base: how many there are, how many are at risk of being lost, and which treatments they prefer based on their age.

Where to find it

Sidebar menu → Marketing → "Insights" tab (default tab).

What it shows

- **General indicators:** total patients, how many have WhatsApp on file (and how many don't), active treatments, and new patients this month.
- **Retention rate (90 days):** the percentage of the total patient base that is **not** inactive (that is, that had a session in the last 90 days).
- **At risk of loss:** patients whose last visit was between 60 and 90 days ago.
- **Lost patients:** patients with no visits for more than 180 days.
- **Reactivation rate:** an estimate of how many "lost" patients managed to be recovered, comparing those lost at 270 days against those lost at 180 days.
- **Charts:** distribution by age, new patients over the last 6 months, top treatments over the last 30 days, distribution by days of inactivity, and preferred treatment by age group.
- **List of inactive patients**, with their last session.

Step by step

1. Go to **Marketing**; it opens on this tab by default.
2. Review the indicators and charts to identify opportunities (for example, patients at risk of loss).
3. Use this information as a basis to build a Patient group and launch a targeted Campaign.

Access by role

This tab, like the entire Marketing module, is **exclusive to the Manager role**.

Frequently asked questions

How is a patient "at risk of loss" defined?

One who has not visited the business in between 60 and 90 days. Once 180 days without a visit have passed, they are considered a "lost" patient.

Is this the same criterion as "inactive client" on the Dashboard?

The "inactive" criterion on the Dashboard and Patients uses 3 months (90 days) without sessions; Marketing uses that same 90-day threshold, but also distinguishes more detailed ranges (60–90 days at risk, +180 days lost) for a finer-grained analysis.

Does the "reactivation rate" specifically measure the result of my WhatsApp campaigns?

No. It's a general estimate of how many patients that were "lost" became active again, regardless of whether they came back due to a campaign sent from this module or for any other reason (for example, they called spontaneously to book an appointment).

Image repository

What is it?

A library of the business's promotional images, ready to be used in WhatsApp campaigns.

Where to find it

Sidebar menu → Marketing → "Images" tab.

Step by step

1. Click **Upload image**.
2. Drag the file or click to select it (supported formats: JPG, PNG, WEBP; it is automatically resized for WhatsApp).
3. Fill in a **name** (required) and, optionally, a **description**.
4. Click **Save**.
5. The image becomes available in the repository, ready to be chosen when creating a campaign.

Deleting an image

1. Find the image in the repository.
2. Click **Delete**.
3. Confirm the action.

Access by role

This tab, like the entire Marketing module, is **exclusive to the Manager role**.

Frequently asked questions

Why is the image automatically resized?

To ensure it displays correctly when sent via WhatsApp.

Common errors

- **An image used in an active campaign can't be deleted** → check whether the image is in use before deleting it.

Patient groups

What is it?

Segmented patient lists, built manually or using filters, which are then used as recipients for a WhatsApp campaign.

Where to find it

Sidebar menu → Marketing → "Groups" tab.

Step by step

1. Click **New group**.
2. Enter a **name** for the group (for example, "Botox Patients").
3. Use the **patient search box** to add them one by one, or use the filter to add several at once:
   - **All with WhatsApp.**
   - **By treatment:** patients who have or have had a given treatment.
   - **By age range.**
   - **By sex.**
   - **Inactive:** patients with no sessions for a chosen number of months.
4. With the filter chosen, click **Add filtered** to add them all to the group at once.
5. Review the **Selected patients** list and remove anyone who doesn't belong.
6. Save the group.

Editing or deleting a group

- Click **Edit** to change the group's name or patients.
- Click **Delete** and confirm to remove it.

> 💡 **Tip:** a group is a "snapshot" of the patients selected at the time it was created or edited; it does not update automatically when new patients meeting the same filter are added.

Access by role

This tab, like the entire Marketing module, is **exclusive to the Manager role**.

Frequently asked questions

Can I build a group with patients who don't have WhatsApp on file?

Yes, although when a campaign is launched, only those with a valid WhatsApp number on their record will receive the message.

Common errors

- **"You must enter a name for the group"** / **"You must select at least one patient"** → complete both requirements before saving.

WhatsApp campaigns

What is it?

The bulk sending of a WhatsApp message (with or without an image) to a group of patients, for free, with no cost per message sent.

Where to find it

Sidebar menu → Marketing → "Campaigns" tab.

Step by step

1. Click **New campaign**.
2. Fill in the **campaign name**.
3. Select the recipient **patient group** (see Patient groups).
4. Optionally, choose a **promotional image** from the repository, or leave the campaign as text only.
5. Write the **message**.
6. The system calculates and shows the number of **patients with WhatsApp** who will actually receive the message.
7. Choose:
    - **Save draft**, to leave it ready without sending yet.
    - **Launch campaign**, to send it right away. The system asks for confirmation, showing the estimated sending time.

Tracking a campaign

Each campaign shows its status: **Draft**, **Pending**, **In progress**, **Completed**, or **Error**. While it's in progress, you can:

- View **Recipients**, **Sent**, and **Errors** in real time.
- Check the **sending detail**: patient, WhatsApp number, status (Sent / Error / No WhatsApp), and time.
- **Cancel** the campaign in progress, if needed (messages already sent cannot be undone).
- **Resend** an already-completed campaign.

> 💡 Messages may take up to a few minutes to be sent.

Campaign limit by plan

Each subscription plan has a monthly campaign limit ("Unlimited" on higher-tier plans). Upon reaching the limit, the system prevents launching new campaigns until the following month, or offers to upgrade the plan.

Access by role

This tab, like the entire Marketing module, is **exclusive to the Manager role**.

Frequently asked questions

Why is the number of recipients lower than the number of patients in the group?
Because only the patients in the group who have a WhatsApp number on file receive the message.

Common errors

- **"WhatsApp is not connected"** → connect the business's WhatsApp from **Settings → Notifications** before launching the campaign.
- **"You have reached the monthly campaign limit for your current plan"** → wait until next month or upgrade the subscription plan.

08

Settings

MODULE 08

Settings — Overview

What is this module?

The **Settings** module holds the business's configuration: business hours, team and sectors, automatic WhatsApp notifications, and the personal/account profile.

Who is it for?

For all three roles, with two tabs exclusive to the Manager:

- **Manager:** access to all four tabs (Agenda, Team, Notifications, Profile), with no restrictions.
- **Professional and Assistant:** access **Agenda** (their own schedule) and **Profile** (their own details). The **Team** and **Notifications** tabs are not shown for either role.

Features

- Agenda settings
- Team and sectors
- Automatic notifications (WhatsApp)
- My profile

Agenda settings

What is it?

The tab where the business's (or each professional's) business hours, past-appointment editing rules, and time zone are defined.

Where to find it

Sidebar menu → Settings → "Agenda" tab (default tab when entering the module).

What you can configure

Working days and hours

For each day of the week (Monday through Sunday), you can specify:

- **Start** and **End**: the business hours for that day.
- **Afternoon Start** and **Afternoon End**: a second shift, for those who work a split schedule (for example, morning and afternoon with a midday break).

You only need to fill in Afternoon Start/End if the day has a break; for a continuous schedule, Start/End is enough.

> ⚠️ The system validates the hours before saving: the **Start** of each shift must be earlier than its **End**, and if a second shift is filled in (split schedule), it must start **after** the first one ends. If any of these conditions is not met, it will not allow saving and flags the day with the error.

General settings

- **Editable Past:** allows (or not) modifying appointments on past dates from the Agenda.
- **Time Zone:** the business's local time zone, used for automatic notifications.

Step by step

1. Go to **Settings → Agenda**.
2. **If you are a Manager with more than one professional reporting to you:** select, in the top selector, which professional's schedule you are configuring.
3. Fill in the hours for each working day.
4. Adjust the **Editable Past** option and the **Time Zone** as needed.
5. Save the changes.

Access by role

- **Manager:** configures the schedule of any professional in the business, selecting them from the top selector.
- **Professional:** configures only their own schedule.
- **Assistant:** configures only their own schedule.

Frequently asked questions

What happens if I don't configure any schedule?

The system uses a default schedule (Monday through Friday) until a custom one is configured.

Common errors

- **"Invalid time format"** → check that the entered times have the correct format (HH:mm).
- **"Could not save the agenda changes"** → try again; if it persists, check your connection.

Team and sectors

What is it?

The tab where the Manager registers and manages the work team's members (professionals and assistants) and organizes the business into sectors.

Where to find it

Sidebar menu → Settings → "Team" tab.

Team management

A list with each team member: name, role, sector, and phone. From there you can:

- Search for a team member by name.
- Edit their details (except the account's primary Manager, who cannot be edited from here).
- Deactivate a team member, or reactivate them if they were deactivated.

Registering a professional or assistant

1. Click **New Professional**.
2. Fill in **first name**, **last name**, **email**, and **password** (required when creating, minimum 8 characters), and optionally address and phone. When editing an existing member, the password field can be left blank to keep it unchanged.
3. Select the **sector** they belong to (required) and the **role**: Professional, Manager, or Assistant.
4. If applicable, fill in the **Costs and Commissions** section:
   - **Fixed Cost** (base salary) and its frequency (weekly or monthly). If "Weekly" is chosen, when calculating the monthly settlement the system multiplies that value **by 4** to get the monthly equivalent (it does not calculate the actual number of weeks in the month).
   - **Effective date** (month and year) from which that fixed cost or commission applies. A notice shows the date of the last modification entered, and clarifies that changing these values **does not affect the calculations of already-completed settlements** from previous months. You cannot choose a period earlier than the current month/year: the system blocks it with the notice "The period cannot be earlier than the last modification."
   - **Treatment Commission**: percentage calculated on the total cost of the treatments that professional **starts** each month (not on what was collected, nor prorated per session).
   - **Product Commission**: percentage on the total of products that professional sells each month.
5. Check **User Enabled** if they should be able to log in right away.
6. Save the changes.

> 💡 **Tip:** the Costs and Commissions data entered here is what the Finance Commissions module uses to calculate each professional's monthly settlement.

Sector management

In a separate panel, within the same tab:

- A list of the business's sectors, with an indication of the default sector (cannot be edited or deleted).
- **New Sector** button, to create an additional one.
- Each sector can be edited or archived (archived sectors stop being available for assignment, but existing data is not deleted).

> ⚠️ A sector **cannot be archived while it has active team members assigned to it**: the system warns "Sector in use" and indicates how many active professionals need to be reassigned before it can be archived.

Access by role

This tab is **exclusive to the Manager role**. Neither Professional nor Assistant can view or access team or sector management.

Frequently asked questions

Why can't I edit the account's primary Manager?

For security reasons, the primary Manager (the account's original owner) cannot be edited or deactivated from this screen.

What happens if I deactivate a professional?

They can no longer log in, but their historical information (appointments, treatments performed) is retained.

Common errors

- **A new professional can't be saved** → check that the email isn't already registered, that a sector has been selected, and that the password has at least 8 characters (the on-screen notice may say 6 due to an app display error, but the actual required minimum is 8).
- **"Sector in use"** → reassign the active team members who still belong to that sector to a different one before trying to archive it.
- **"The period cannot be earlier than the last modification"** → the Costs and Commissions effective date does not accept a month/year earlier than the current one; choose the current month or a later one.

Automatic notifications (WhatsApp)

What is it?

The tab where the automatic reminders sent to patients via WhatsApp before their appointments are configured, and from where the business's WhatsApp is connected to the system.

Where to find it

Sidebar menu → Settings → "Notifications" tab.

> This tab requires a subscription plan above the basic plan; if the business has the basic plan, an invitation to upgrade the plan is shown instead of the content.

Automatic reminders

- **24-hour reminder:** turns the automatic sending of a reminder one day before the appointment on or off.
- **Same-day reminder:** turns the automatic sending of a reminder on the day of the appointment on or off.

Message template

A text editor where the message to be sent is written, with:

- **Variables** that are automatically filled in for each appointment: FirstName, LastName, Date, Time, Treatment, ProfessionalFirstName, ProfessionalLastName. They are inserted by clicking or dragging them into the text.
- An **emoji** selector to include in the message.
- **Send test** button, to test how the message looks before activating it.

WhatsApp connection

A panel shows the connection status (Connected / Disconnected):

- If **disconnected**, a **Connect** button starts the process.
- Upon connecting, a **QR code** is generated to scan from the business's WhatsApp app (the same as linking WhatsApp Web).
- Once **connected**, the linked account's name is shown, with the option to **Disconnect**.

> 💡 If WhatsApp disconnects, the system automatically notifies you on the Dashboard (see Notifications and alerts) that reminders are paused.

Access by role

This tab is **exclusive to the Manager role** (and to the Individual user, for someone who works alone). Neither Professional nor Assistant have access to this configuration.

Frequently asked questions

What happens if I disconnect WhatsApp?

Automatic reminders stop being sent until it is reconnected.

Common errors

- **The QR code doesn't appear** → use the **Refresh QR** button to generate a new one.

My profile

What is it?

The tab with the personal and business details of the logged-in user, the system's appearance, the subscription plan, and account security.

Where to find it

Sidebar menu → Settings → "Profile" tab.

What you can configure

Personal and business details

- Business **logo**.
- First name, last name, and specialty (editable). The account's **email** is shown but cannot be edited from here.
- Company and **billing email** (must match the one used on the business's payment platform).
- Country, area code, and phone.

Appearance

- **System theme:** light or dark.
- System **language**.

Subscription plan

- View the **current plan**, including remaining days if on a trial period.
- **Change plan** button, which opens a window with the available plans and their features. Choosing a plan (different from the current one) prompts for the **payment method** (Mercado Pago or Paddle, depending on the region) and payment is completed from there; the system shows a confirmation notice while processing the change.

Security

- **Change password** button for the account: asks for the current password, the new one (minimum 6 characters), and its confirmation. If you log in with Google, you can leave the current password field blank.

Step by step

1. Go to **Settings → Profile**.
2. Edit the details you need to update.
3. Save the changes.

Access by role

Available equally for all three roles: **Manager**, **Professional**, and **Assistant** can configure their own profile. The **subscription plan** section applies to the business's entire account, not just the user viewing it.

Frequently asked questions

Does changing my profile affect other team users?

No, each user edits only their own personal details. The subscription plan, however, is shared across the whole account.

09

Help for the mobile app

MODULE 09

Help for the mobile app — Overview

What is this section?

The Estética Gestión mobile app offers a version of the system adapted for mobile phones. It is not an exact copy of the desktop version: some screens are simplified, others are organized differently, and **the Marketing module is not available in the mobile app** (it exists only in the web version).

This section specifically documents what is different or unique to the mobile app. For features that behave the same as in the web version, reference is made to the corresponding article in modules 01 through 08.

Mobile app scope

Module	Available on mobile?
Dashboard	Yes
Agenda	Yes
Patients	Yes
Treatments	Yes
Products	Yes
Finance	Yes
Marketing	No — only available in the web version
Settings	Yes (reduced version)

Documented features

- General differences between the mobile app and the web
- Dashboard on mobile
- Agenda on mobile
- Patients on mobile
- Treatments on mobile
- Products on mobile
- Finance on mobile
- Settings on mobile

General differences between the mobile app and the web

What is this mobile app?

It is the same Estética Gestión platform, adapted for use from a mobile phone. It shares the same information and the same business rules as the desktop version (the data is the same, in real time), but some screens are redesigned for a touch experience, and some advanced features are only available in the web version.

How to access it

The mobile interface activates automatically when you log into the system from:

- The **app installed on the phone** (Android), or
- The phone's **browser**, **after adding the shortcut to the home screen** (the "install app" feature offered by mobile browsers).

If you access from a phone's browser **without having installed the shortcut**, or from a laptop/PC with a narrow window, the system **does not automatically switch to the mobile interface**: to get the full mobile experience, the app must be installed on the device.

Main differences from the web

Navigation

- On the web, the module menu is always visible in a fixed sidebar.
- On mobile, the menu opens and closes with the **three-line icon (≡)**, located at the top left of every screen.

Screen design

- The web version's tables are generally replaced by **vertically stacked cards**, designed for scrolling with a finger.
- To refresh a screen's information, you can **swipe down from the very top** ("pull to refresh" gesture), available in several sections.
- Actions on an item (for example, an appointment or a patient) usually expand **by tapping the corresponding card**, instead of always being visible as on the web.

Features not available on mobile

- The **Marketing** module is not available in the mobile app; it can only be used from the web version.
- In **Agenda**, the traditional grid-style calendar view (month/week/day), the multi-professional **Overview**, the **Collisions and opportunities** panel, and **PDF export** are not available on mobile (see Agenda on mobile for details on what replaces each one).

Frequently asked questions

Is the data I see on mobile the same as on the web?

Yes, it's the same system and the same database; any change made from one device is reflected immediately on the other.

I log in from the phone's browser but I see the desktop version — why?

Because the mobile interface requires the app to be installed on the device (or added to the home screen from the browser). While browsing without installing it, the web version adapted to the screen width is shown, not the full mobile design.

Dashboard on mobile

What is it?

The same home screen as on the web (see Dashboard), with all the same information and the same calculations, adapted to a single column for a phone screen.

Differences from the web

- The menu opens with the ≡ icon (top left), instead of the fixed sidebar menu.
- The patient search box is its own search bar below the header, instead of a field built into the header.
- The three indicator cards (Appointments today, Estimated revenue, New clients) are shown in a row of 3 compact columns, instead of large cards.
- The button to schedule a new appointment is a calendar icon with a "+" in the header (not a text button).
- Notifications open in a full-screen panel, instead of a dropdown menu.
- The **Pending sessions** and **Inactive clients** sections are shown as lists of stacked cards, instead of tables.
- You can **swipe down** from the top of the screen to refresh all Dashboard data (pull to refresh).

What is the same as on the web

- The weekly occupancy chart, the filter by sector (for the Manager role), upcoming birthdays, and all indicator calculations are exactly the same as on the web version — see the full details in Indicators, Weekly occupancy, Pending sessions, and Inactive clients.
- The **Register** button for a pending session also follows the same role-based permissions as on the web (not available for the Assistant role).

Access by role

The same as on the web version: patient panels are shared across the entire business for all three roles; those related to appointments and revenue (indicators, pending sessions, occupancy) show the entire business for Manager and Assistant, but are limited to their own for the Professional role. See details in each article of the Dashboard module.

Frequently asked questions

Why does swiping down reload the whole screen?

It's the standard "pull to refresh" gesture used in mobile apps; it lets you fetch the latest data without needing to close and reopen the app.

Agenda on mobile

What is it?

The mobile version of the Agenda shows the day's appointments in a **vertical list (timeline)**, instead of the grid calendar (day/week/month) of the web version.

Differences from the web

Date navigation

Instead of the monthly/weekly calendar, the mobile Agenda offers:

- A **strip of days** at the top (side by side), where you can tap any day to see its appointments.
- A calendar button that opens the phone's native date picker, to jump directly to a specific date.

The day's appointments

Each appointment is shown as a **card**, with the time, the patient's name, and the treatment. A color on the left edge indicates the status: green for pending, gray for completed, red for canceled.

Tapping a card expands the available actions for that appointment:

- **Register**: opens the window to register the session as completed (the same as on the web, see Registering a completed session).
- **Reschedule**: opens a window to change the appointment's date and time, filling in the corresponding fields.
- **Record**: takes you directly to the patient's record.

Professional selector

If the user has access to more than one professional's agenda, a selector is shown at the top of the screen (equivalent to the one on the web).

Features not available on mobile

- **There is no grid-style calendar view** (month/week/day); only the day-by-day list view.
- **You cannot reschedule by dragging the appointment**: on mobile, rescheduling is done by filling in the date and time in a window, not by dragging and dropping as on the web (see Rescheduling an appointment for the web version).
- **The Overview is not available** (the agenda of all professionals on a single screen).
- **The Collisions and opportunities panel is not available**.
- **You cannot block a time slot** or export the agenda as PDF from the mobile app; these actions are only available in the web version.

Access by role

The same as on the web: **Manager** and **Assistant** can view and manage any professional's agenda in the business; **Professional** can only manage their own agenda (and view, without editing, that of coworkers in their same sector). The **Assistant** role can schedule and reschedule appointments for any professional, but does not have the **Register** action.

Frequently asked questions

Can I see several days at once on mobile?

No; the view is designed to show one day at a time. For a broader view of the business (week, month, or several professionals at once), we recommend using the web version.

Patients on mobile

What is it?

The mobile version of the Patients module, with the business's patient list and their record, adapted to a phone screen.

Differences from the web

- The menu opens with the ≡ icon instead of the sidebar menu.
- The button to **add a new patient** is an icon in the header (top right).
- Patient search is done from a search bar below the header.
- Instead of a table, patients are shown as a **list of cards**; tapping a card opens the patient's full record.
- Below the search box there is a row of **quick filters**, scrollable horizontally:
  - **All**
  - **Appointments this week**
  - **Debtors** (visible for Manager and Assistant; not available for the Professional role)
  - **VIP**
  - **Inactive**
  - **New**

Each filter shows, in parentheses, the number of patients meeting that condition.

From the patient's record it is also possible to **register a payment**, from the **Balance** tab (something not available from the Finance module in the mobile app; see Finance on mobile). This Balance tab is only available for **Manager** and **Assistant** (see "Access by role" below).

The patient record on mobile has one fewer tab than on the web: **Balance** is a standalone tab (not part of Treatments, as on the web), and **the Products tab does not exist**. This means that, for now, **products cannot be sold to a patient from the mobile app**; to record a product sale to a particular patient, the web version must be used (see Products tab).

Access by role

Patients are shared across the entire business: **Manager**, **Professional**, and **Assistant** see the same full patient list, regardless of who attended to them. The exception is the **Debtors** filter, available for Manager and Assistant, but not for the Professional role.

On the patient's record, the **Professional** role also does not have the **Balance** tab: they cannot see the patient's balance or register payments or vouchers from the mobile app — the same restriction they have in the web version (see Treatments tab (and payments)).

Frequently asked questions

What do the VIP, Inactive, and New filters mean?

These are automatic classifications the system calculates based on the patient's activity (number of recent sessions, time since last visit, registration age). The full details of these criteria are documented in the Patients module.

Treatments on mobile

What is it?

The mobile version of the business's treatment catalog, with the same information as the web version adapted to a phone screen.

Differences from the web

- The menu opens with the ≡ icon instead of the sidebar menu.
- The button to **create or configure a treatment** is only shown to the Manager role.
- Includes a horizontally scrollable stats bar, with quick catalog indicators (for example, number of active treatments).
- If the business has **sectors** configured, a filter button is available to narrow the list to a specific sector.
- You can **swipe down** to refresh the list (pull to refresh).

Access by role

- **Manager:** sees and can configure the entire treatment catalog, from all sectors. Creating, editing, and deleting treatments is an action **exclusive to this role**.
- **Professional:** only sees treatments in **their own sector** (if the business has sectors configured); cannot create or edit catalog treatments.
- **Assistant:** sees the entire treatment catalog, from all sectors, but also cannot create or edit treatments.

Frequently asked questions

Why don't I see the button to create a new treatment?

Because this action is reserved exclusively for the Manager role; neither Professional nor Assistant have it.

Why don't I see all the treatments in the catalog?

If your role is Professional and the business has sectors configured, you only see the treatments belonging to your own sector.

Products on mobile

What is it?

The mobile version of the business's product catalog (sale, supplies, and vouchers), with a built-in shopping cart to record sales.

Differences from the web

- The menu opens with the ≡ icon instead of the sidebar menu.
- A **shopping cart** icon, in the header, shows the number of added products and lets you open the cart to complete a sale.
- The button to **add a new product** is only shown to the Manager role.
- Below the search box there are scrollable category tabs: **All**, **Sale**, **Supply** (this last one only visible with permission to view internal-use products), and **Voucher**.

Access by role

- **Manager:** sees all four categories and is the **only role** that can create or edit catalog products, of any category.
- **Professional:** sees **All**, **Sale**, and **Voucher**, but **never** sees the **Supply** category. Cannot create or edit any product, not even Sale or Voucher ones — only sell them.
- **Assistant:** sees all four categories, including **Supply** (unlike Professional). Also cannot create or edit products, but can register purchases (stock replenishment), something Professional cannot do.

Frequently asked questions

Why can't I edit a Sale product if my role is Professional or Assistant?

Because editing the catalog (of any category) is an action exclusive to the Manager role throughout the entire system.

What's the difference between "Sale," "Supply," and "Voucher"?

These are product catalog categories: "Sale" products are sold to the client, "Supply" products are for the business's internal use, and "Voucher" corresponds to gift certificates. The full details of this classification are documented in the Products module.

Finance on mobile

What is it?

A **simplified view** of the business's financial indicators: total sales, expenses/costs, and other indicators for the month, navigable month by month.

> ⚠️ **Important:** the system itself shows a notice on this screen: *"Simplified view. To see the full financial report, log in from a computer or tablet."* The mobile Finance app is designed for a quick check, not a replacement for the full report in the web version.

What you can do

- Navigate between months with the ‹ › arrows located above the list of indicators.
- View four summary cards:
  1. **Total Sales** for the selected month, with its trend.
  2. **Expenses/Costs** for the selected month.
  3. **Net Profit** (Total Sales – Expenses/Costs).
  4. **Outstanding**: unlike the other three, **it does not change based on the selected month** — it always shows the total accumulated debt from the client base as of today (see the same clarification in Overview in the web version).
- **Top Treatments** and **Top Products**: the 3 treatments and 3 products with the most revenue in the selected month, with their quantity sold.
- Swipe down to refresh the data (pull to refresh).

Differences from the web

- The full transaction detail, advanced charts, and the other tabs of the web financial report are not available.
- For a complete financial analysis of the business, we recommend using the web version (see the Finance module). Registering a patient's payment can be done from mobile, but from the patient's record in the **Patients** module, not from this Finance screen.

Access by role

Unlike the web version (where each role sees different tabs, see the Finance module), the Finance screen on mobile is the **same for all three roles**, but the content it shows varies:

- **Manager:** sees all four cards and the rankings with the real, complete data for the entire business.
- **Assistant:** sees the actual **Total Sales** for the entire business, but the **Expenses/Costs** card always shows **$0**, since this role does not have access to the business's expenses. Since it depends on these two values, **Net Profit** also does not reflect reality for this role.
- **Professional:** sees only **their own** sales (not the rest of the team's) in "Total Sales," and like the Assistant, "Expenses/Costs" always shows **$0**. The **Outstanding** card is also limited to patient debts originating from transactions this role personally recorded, not the actual, complete debt for those patients.

> ⚠️ These "$0" values or partial figures don't mean the business had no expenses, or that a patient doesn't owe money: they mean the role doesn't have access to see that complete information. Only the Manager sees these cards with the business's real, total information.

Frequently asked questions

Why can't I enter a payment from this screen?

Because on mobile, payments are registered from the patient's record, in the **Patients** module, not from Finance. Other transactions, like business expenses, require the web version and the Manager role.

My "Expenses/Costs" card always says $0 — is this an error?

No, this is expected behavior if your role is Professional or Assistant: they don't have access to that information.

Settings on mobile

What is it?

A **reduced** version of the business's configuration, limited to two of the web's four tabs: **Agenda** and **Profile**. The **Team** (which includes sector management) and **Notifications** tabs are only available from the web version.

Available sections

Agenda

Lets you configure:

- **Business days and hours** (including split schedules, with two time slots per day).
- The option to allow or not allow editing appointments on **past dates**.
- The business's **time zone**.

Profile

Lets you configure:

- The business's **logo**.
- Personal/business details: first name, last name, email, specialty, company, billing email, country, area code, and phone.
- The system's **language**.
- View the current **subscription plan** (including remaining trial days, if applicable).

Differences from the web

- Not available from mobile: **Team** management (registering professionals/assistants, their costs and commissions, and the business's sectors) or automatic WhatsApp **Notifications** configuration. Both are also exclusive to the Manager role even in the web version.
- The **Profile** tab on mobile does not include the light/dark **theme** selector that the web has; it only allows changing the language.
- The account's email also cannot be edited from Profile on mobile (same as on the web).
- For any of those configurations, you need to log in from the web version (see the Settings module).

Access by role

- **Manager:** accesses both sections (Agenda and Profile) with no restrictions.
- **Professional and Assistant:** access the configuration for their own Agenda and their own Profile.

Frequently asked questions

How do I register a new professional or assistant from the phone?

This is not possible from the mobile app; that action is done from **Settings → Team** in the web version.