USER GUIDE

Online booking guide

Salons, clinics, consultants, teachers, gyms and event hosts: your trade profile, card designs, services, staff, hours, appointments, customers, privacy, classes and events, reminders and the launch checklist.

Wednesday, 27 Aban 1405

Contents

1. Getting started with the appointment trade editions

- What is a trade edition?
- How you get your edition
- What changes in your dashboard
- The set-up checklist
- Set up in 7 steps
- Where everything is

2. Getting started with online booking

- What is it for?
- How customers book
- Before you start
- Map of the menu
- Set up in 8 steps
- Patterns shared by every page

3. Overview

- The overview page
- Figure tiles
- Today's Schedule
- Popular Services
- Upcoming Appointments (Next 7 Days)
- Quick Stats
- Quick Actions

4. Your trade profile

- What a trade profile decides
- Hidden is not the same as locked
- Beauty salon
- Practice & clinic
- Consulting
- Teaching
- Gym & fitness
- Events & workshops
- Where the words appear

5. Card designs for booking trades

- Eight designs, one layout
- What your visitors see
- The open / closed status
- The action strip
- The services strip
- Changing the design
- Colours

6. Services

- What is a service?
- Two kinds: private and group
- The service list
- Create or edit a service
- Service statistics

7. Staff

- Why add staff?
- The staff list
- Add a staff member
- How services and staff connect
- Where staff see their appointments
- Deactivate or delete
- Staff statistics

8. Opening hours, time slots and blocked times

- How free times are worked out
- Weekly opening hours
- The Time Slots page
- Add one slot

- Generate many slots
- Block time
- Which tool for which job?

9. Appointments

- The life of an appointment
- The appointment list
- Move an appointment
- The appointment page
- Book from the dashboard (phone or walk-in)
- Cancel or delete?

10. Customers

- Where customers come from
- Trust score
- The customer list
- The customer record
- Block a customer

11. Clinics and privacy

- A calm, trusted edition
- The privacy line
- Patient records
- The licence check
- Psychologists and therapists
- Online and in-person visits

12. Classes, group sessions and events

- One tool for classes, workshops and tours
- Make a service a group session
- How places fill up
- Dates for events
- Tickets and attendees
- Showing past events

13. Booking settings

- The settings list
- The settings page of one business
- Business hours
- Booking rules
- Booking protection

14. Notifications and reminders

- Where is it?
- Alerts: channels and events
- Reminders
- Preview
- Reminder activity

15. Growing your business

- Growth offers on your dashboard home
- What each trade is offered
- The add-on store for your trade
- Hybrid businesses

16. Launch checklist, recipes and FAQ

- Before opening day
- Recipes
- FAQ
- Glossary

17. How-tos, FAQ and glossary

- How-tos: "I want to…"
- FAQ and troubleshooting
- Glossary

CHAPTER 1

🚀 Getting started with the appointment trade editions

What a trade edition is, the six booking-based editions, how you get yours, what changes in your dashboard and the set-up checklist.

What is a trade edition?

Cardynex comes in **trade editions**: the same platform, arranged for one kind of business. Six editions are built on online booking and share this guide:

Edition	Made for	Your card's design
Beauty salon	hair, nail and beauty salons, spas, barbers	**Salon**
Practice & clinic	doctors, dentists, psychologists, therapists	**Clinic**
Consulting	lawyers, consultants, coaches	**Studio**
Teaching	teachers, tutors, language and music schools	**Academy**
Gym & fitness	gyms, fitness and yoga studios, personal trainers	**Pulse**
Events & workshops	workshops, tours, meetups and small venues	**Stage**

In every one of them:

- your **card** is your booking page: open or closed, a big book button, your services with length and price;
- your **dashboard** puts booking first, speaks your trade's words and hides tools your trade does not need;
- a **set-up checklist** on the dashboard home walks you to your first real booking.

The first chapters of this guide explain what is special about these editions. Booking itself (services, staff, hours and time slots, appointments, customers, reminders) follows, starting with Getting started with online booking.

> ⓘ **Note**
>
> The **Photography** and **Real estate** editions also use booking and the card designs of this guide (**Lens** and **Estate**), but their main tools have their own guides, for example the Photo Studio guide.

How you get your edition

Way	What happens
Sign up as a business	When you turn your account into a business and pick your trade (salon, doctor, psychologist, lawyer, teacher, gym, events), the matching edition is switched on.
From your trade's page	The "for salons", "for doctors"… pages of the website start the sign-up with your trade already chosen.
Buying a trade package	Buying a package made for a trade (for example the salon package) puts an account that has no edition yet into that trade.
Ask support	An administrator can switch your edition, or back to the general dashboard, at any time. Nothing is deleted.

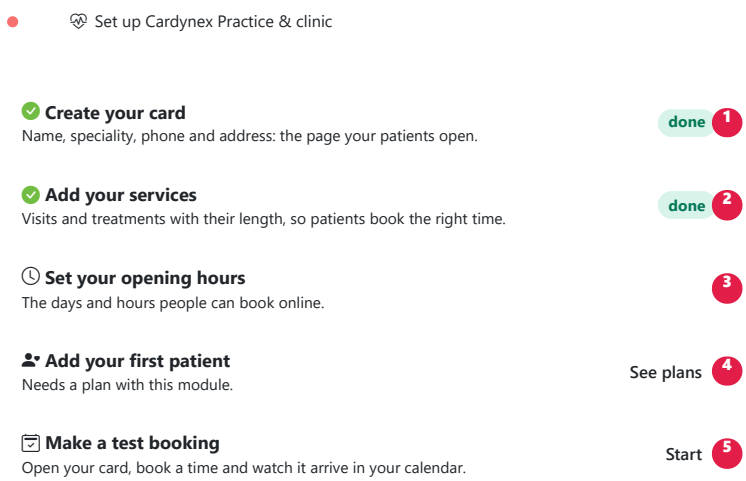
> ⓘ **Note**
>
> The edition only arranges your dashboard. What you can use still depends on your **plan**: a step or page that needs a module your plan lacks leads to the plans page instead.

What changes in your dashboard

Part	What the edition does
Menu order	**Booking** comes first, followed by your trade's own tools (for example **Patients** for a clinic, **Flashcards** for a teacher).
Hidden tools	Tools of other trades are hidden: no food menu for a doctor, no patient records for a gym. See Your trade profile.
Words	The dashboard says your trade's words: **Patients** and **Visits** in a clinic, **Members** and **Classes** in a gym…
Add-on store	Modules for your trade come first under **For your trade**; good companions under **Grow your business**; the rest under **More modules**.
New cards	A new card starts in your trade's category with your trade's card design.

The set-up checklist

Until every step is done, the dashboard home shows a checklist with your progress. Each step opens the right page; a step that needs a module your plan does not include shows **See plans** instead.



The steps depend on your trade:

Step	Done when	Salon	Clinic	Consulting	Teaching	Gym	Events
Create your card	you have a card	✓	✓	✓	✓	✓	✓
Add your services	one service exists	✓	✓	✓	✓	✓	✓
Add your team	one staff member exists	✓				✓	
Set your opening hours	booking hours saved, or a time slot added	✓	✓	✓	✓	✓	✓
Add your first patient	one patient record exists		✓				
Make your first flashcard deck	one deck exists				✓		
Make a test booking	the first appointment arrived	✓	✓	✓	✓	✓	✓

The checklist disappears by itself when all steps are done. In its place, the dashboard home may then show up to two growth offers.

> **Tip**
>
> Opening hours count as set once you **save** the booking settings yourself: the default hours created with your first service do not tick the step.

Set up in 7 steps

This order needs the least going back and forth:

1. **Fill in your card**: name, logo, cover photo, phone, address and **Working Hours**; switch on online booking. See Card designs.
2. **Add your services** in Services: length and price; for classes, tours and workshops choose a group session (see Classes, group sessions and events).
3. **Add your team** in Staff if more than one person takes bookings.
4. **Set your opening hours** in the booking Settings, or add dated time slots for events.
5. **Add your trade's tools**: patient records for a clinic (Clinics and privacy), a flashcard deck for a teacher, the members club for a gym.
6. **Make a test booking** from your card and find it in Appointments.
7. **Go through the** launch checklist before your first real customers.

Where everything is

Chapter	What it explains
Your trade profile	per trade: tools shown and hidden, words, design, checklist
Card designs	the eight booking designs, what visitors see, changing the design
Clinics and privacy	patient records, the licence check, the privacy line
Classes, group sessions and events	places per session, tickets, event dates
Growing your business	growth offers, the add-on store, hybrid businesses
Launch checklist and FAQ	checks before opening, recipes, answers, glossary

CHAPTER 2

🚀 Getting started with online booking

What the booking system does, how customers book, what you need before you start, and where to begin.

What is it for?

With the `Booking System`, customers **book appointments online** right from your digital card — no phone calls, no back-and-forth messages. It suits hairdressers, practices, clinics, consultants, schools, gyms, workshops and any business that sells time.

- You define your **services** with duration and price (private or group).
- You set **opening hours**, time slots and blocked times (holidays, meetings).
- Customers only see **times that are really free**; other appointments, the gap between appointments and staff capacity are taken into account automatically.
- You confirm, move, cancel or complete appointments, and the customer is told by e-mail or SMS.
- **Automatic reminders** before the appointment cut down on no-shows.
- Every customer has a history, a trust score and private notes.

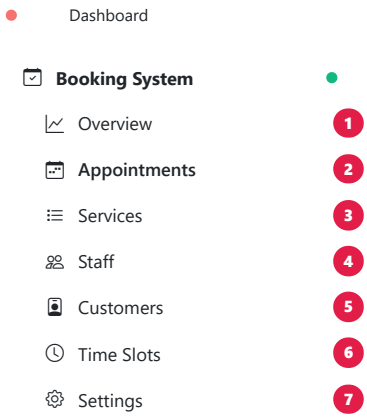
How customers book

1. **They pick a service** in the booking tab of your card.
2. **They pick a staff member** — only when two or more people provide that service. They can also leave it to "the first free one".
3. **They pick a day and time**; only free times are shown.
4. **They confirm their phone number or e-mail with a one-time code.**
5. **The appointment is saved**: `Pending` if you approve bookings manually, otherwise `Confirmed`. The customer gets a confirmation and you are notified.
6. **Before the appointment** they get a reminder; once it is completed they can rate the visit.

Before you start

Requirement	Details
A plan that includes it	Booking must be part of your plan; if `Booking System` is locked, upgrade your plan.
Booking switched on for the card	On the card's edit page, switch on `Booking`. Without it the pages show `No Booking-Enabled Cards` or `Booking System Not Set Up`.
At least one active service	Without a service there is nothing to book.

Map of the menu



#	Menu	Used for	Chapter
1	Overview	Today's schedule, figures, top services and customers	Overview
2	Appointments	Every appointment: confirm, move, remind, cancel	Appointments
3	Services	What customers book, with duration and price	Services
4	Staff	The people who provide your services	Staff
5	Customers	History, trust score and notes of every customer	Customers
6	Time Slots	Time slots of single days and blocked times	Hours and time slots
7	Settings	Opening hours, booking rules, protection, notifications and reminders	Settings and Notifications

Set up in 8 steps

1. **Set your opening hours**: Booking settings → your business → **Business hours** .
2. **Review the booking rules**: base appointment length, gap between appointments, daily limit, how far ahead, manual approval.
3. **Create services**: Services → **Add Service** .
4. **Add staff** (skip this if you work alone): Staff.
5. **Set up notifications and reminders**: e-mail/SMS and reminder times.
6. **Set exceptions**: in Time Slots, block holidays or create slots for special days.
7. **Make a test booking** on your own card.
8. **Confirm and then cancel the test appointment** in Appointments to see the cycle.

Patterns shared by every page

- **Chips**: above every list; counters and quick filters at once.
- **In-place filters**: no page reload; the page address updates and can be bookmarked.
- **Action dialogs**: confirm, cancel, move, remind and message happen in a small dialog with the result shown on the spot; you stay on the page.
- **Notification channel**: wherever the customer is told something, you choose e-mail, SMS or both. Every SMS uses SMS credit.
- **The** **Business** **filter**: only when you have more than one card with booking.
- **Phones**: the sidebar becomes a drawer, tables become cards, and settings get tabs at the top.

CHAPTER 3

Overview

The booking home page — today's and this week's appointments, revenue, popular services, top customers and staff.

The overview page

Booking System → **Overview** is your daily starting point. If no card has booking switched on, you see **Booking System Not Set Up** and an **Enable Booking Feature** button.

Figure tiles

Tile	What it tells you
Total Appointments	All appointments and how many were completed
Today	Today's appointments and today's revenue
Upcoming	Future appointments and how many were cancelled
Total Revenue	All-time revenue (from completed appointments)

Today's Schedule

Today's appointments by time, with service, duration, customer and status. With nothing booked today: **No appointments today** .

Popular Services

Services by number of bookings, with price and a popularity bar. With no service yet, **Add Service** opens a quick service dialog (the same fields as in Services).

Upcoming Appointments (Next 7 Days)

The next seven days: **Date & Time** , **Customer** , **Service** , **Staff** (or **Any staff**), **Status** and the **View** and **Edit** buttons. **View All** opens the full list.

Quick Stats

- **Top Customers** : the customers with the most bookings.
- **Staff Performance** : appointments per staff member.

Quick Actions

Add Appointment , **Add Service** , **Add Staff** and **Settings** .

> **Tip**
>
> Every morning look at three things: **Today's Schedule** , the **Pending** appointments waiting for you in Appointments, and any appointment without a staff member.

CHAPTER 4

Your trade profile

For each appointment trade, the tools that come first, the tools that stay hidden, the words your dashboard uses and the card design it starts with.

What a trade profile decides

Every edition is described by one profile. It decides five things, and nothing else:

Part	Effect
Tools first	the order of the **Booking**, trade tools and business tools in your dashboard menu
Hidden tools	tools of other trades that never appear in your menu or add-on store
Words	how the dashboard calls customers, appointments, services and staff
Card design	the design a new card starts with, and the designs offered first
Checklist	the set-up steps on your dashboard home

What you can **use** is still decided by your plan. A profile never unlocks a module and never takes one away from you: it only arranges the dashboard around your trade.

Hidden is not the same as locked

Kind of tool	When hidden	If your plan includes it
A general tool another trade needs (for example **Customer club** in a clinic)	hidden by the profile	it comes back in your menu: a hybrid business sees what it pays for
A trade's own tool (**Menu & orders** for restaurants, **Flashcards** and **Quizzes** for teachers, **Photo studio** for photographers, **Patients** for clinics and consultants)	always hidden in other trades	it stays hidden and is not sold to you

Note

Payments and **Notifications** are core tools: no profile can hide them.

Beauty salon

Tools first	**Booking**, **Card features**, **Customer management**, **Customer club**, **Surveys**
Hidden	patients, food menu, flashcards, quizzes, listings board
Words	**Clients**, **Stylists**
Card design	**Salon**, also **Studio**
Checklist	card, services, team, opening hours, test booking

A salon usually has several stylists with their own hours: add each one in Staff and choose who does which service. Details: Staff.

Practice & clinic

Tools first	**Booking** , **Patients** , **Card features** , **Customer management**
Hidden	food menu, shop, customer club, flashcards, quizzes, listings board, photo studio
Words	**Patients** , **Visits** , **Treatments** , **Practitioners**
Card design	**Clinic** , also **Studio**
Checklist	card, services, opening hours, first patient, test booking

Doctors, dentists and psychologists all get this edition. Food, shop and loyalty tools stay out of your dashboard, so they never end up on your card. Patient records and privacy: Clinics and privacy.

Consulting

Tools first	**Booking** , **Card features** , **Customer management**
Hidden	food menu, shop, customer club, patients, flashcards, quizzes, photo studio
Words	**Clients** , **Sessions**
Card design	**Studio** , also **Clinic**
Checklist	card, services, opening hours, test booking

Make one service per kind of consultation (first meeting, follow-up, package) with its own length and price. A consultant who keeps client files can add the patients module with a plan that includes it.

Teaching

Tools first	**Booking** , **Flashcards** , **Quizzes** , **Card features** , **Customer management** , **Surveys**
Hidden	food menu, shop, customer club, patients, photo studio, listings board
Words	**Students** , **Lessons** , **Courses** , **Teachers**
Card design	**Academy** , also **Studio**
Checklist	card, services, opening hours, first flashcard deck, test booking

Flashcards and quizzes belong only to this edition. How to build decks and invite students: Flashcards guide.

Gym & fitness

Tools first	**Booking** , **Customer club** , **Card features** , **Customer management** , **Surveys**
Hidden	food menu, patients, flashcards, quizzes, photo studio, listings board
Words	**Members** , **Sessions** , **Classes** , **Coaches**
Card design	**Pulse** , also **Studio**
Checklist	card, services, team, opening hours, test booking

Group classes are services with places: see Classes, group sessions and events. The customer club lets walk-in visitors join at the front desk with a tablet.

Events & workshops

Tools first	**Booking** , **Card features** , **Customer management** , **Surveys** , **Marketing**
Hidden	food menu, patients, flashcards, quizzes, photo studio, listings board, customer club
Words	**Attendees** , **Tickets** , **Events** , **Hosts**
Card design	**Stage** , also **Studio**
Checklist	card, services (your events), opening hours (your event dates), test booking (a ticket)

An event is a group service, its dates are time slots and a ticket is a booking of places: see Classes, group sessions and events.

Where the words appear

The trade words replace the general ones in the booking menu (**Appointments** , **Services** , **Staff** , **Customers**) and in the dashboard texts that use them. Your own content, such as service names and descriptions, is never changed: write it in the words your customers use.

CHAPTER 5

Card designs for booking trades

The eight booking designs, what visitors see on them, which card settings fill each part, and how to change the design.

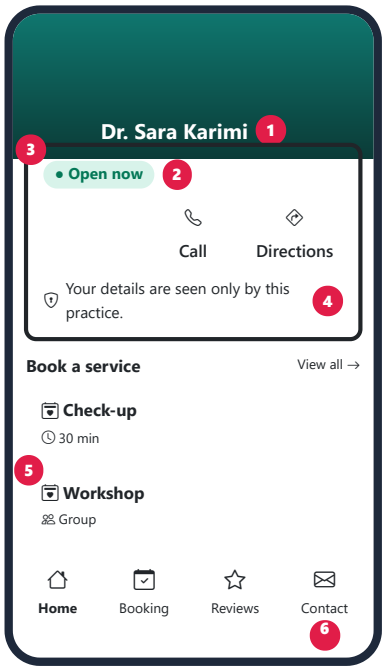
Eight designs, one layout

Your card is where people decide to book. The booking editions share one layout made for that moment, in eight looks. Every design shows the same parts; only colours, type and the trade's own words differ.

Design	Look	Book button	Extra button	Services title
Salon	blush and deep plum, soft rounded cards	Book now		Book a service
Clinic	calm teal on white, with a privacy line	Book now		Book a service
Studio	ink navy and brass, serif headings	Book now		Book a service
Academy	deep indigo and sunny yellow	Book a lesson	Flashcards	Courses and lessons
Pulse	near-black and electric lime, bold headings	Book a class	Members club	Classes and training
Stage	midnight violet, coral spotlight, ticket-style rows	Get tickets	Past events	Upcoming events
Lens	white prints on a dark charcoal mat	Book a shoot	Portfolio	Shoot packages
Estate	navy and champagne gold on warm stone	Book a viewing	Listings	Book a viewing

A new card starts with your trade's design (see Your trade profile); you can switch at any time (see Changing the design).

What your visitors see



#	Part	Comes from
1	**Cover** with your logo, name and tagline	the card's logo, cover photo and tagline
2	**Open now / closed** with the next opening time	the card's **Working Hours**
3	**Action strip**: book, the trade button, call, directions	the card's switched-on features (see below)
4	**Privacy line** (**Clinic** design only)	always shown on the Clinic design
5	**Services strip**: up to eight services; a tap opens booking with that service chosen	your bookable services, in their display order
6	**Tabs**: home, booking, reviews, contact…	the card's switched-on features

On a phone the card fills the screen. From a tablet up it becomes a website: a top bar with your name, a wide cover, the tabs as a sticky bar and your contact details beside every tab. The **Stage** design puts a **Get tickets** button in the top bar too.

The open / closed status

Visitors see	When
Open now	the current time is inside today's working hours
Closed now + **the next opening**	outside the hours
You can still book online	closed, and the card takes bookings
nothing	the card shows no working hours

> **Tip**
>
> The status uses the card's **Working Hours**, not the booking hours. Keep both right, especially on holidays.

The action strip

Each button appears only when the card has what it needs, so a visitor never taps a dead button:

Button	Appears when	Opens
Book button	online booking is on for the card	the booking tab
Trade button	the card has that tab: **Flashcards** (**Academy**), **Members club** (**Pulse**), **Past events** and **Portfolio** (the gallery tab), **Listings** (**Estate**)	that tab
Call	the card has a phone number	the phone's dialler
Directions	a location with a map point or a directions link	maps, in a new tab

The services strip

The home tab lists up to eight of your bookable services: photo (or the design's icon), name, length in minutes, a **Group** mark for group sessions, and the price. A tap on **Book** opens the booking tab with that service already chosen; **View all** opens the booking tab itself.

> **Tip**
>
> Give each service a photo and put the most booked ones first with **Display order** in the service form: the strip follows that order.

Changing the design

Open Cards, then **More** → **Card design** on the card (or **Card design** at the top of the card's edit page).

Part of the page	Shows
For your trade	your edition's designs, your trade's own design first
More designs	**Standard** (the classic Cardynex card) and designs made for every trade
Current design	the badge on the design the card uses now

1. **Press** **Preview** : your own card opens in a new tab with that design. Only you see it; nothing is saved.
2. **Press** **Use this design** on the one you like. The card changes at once; content, links and QR codes stay the same.

Designs of other trades (for example the restaurant designs for a clinic) are not offered. If your card has a design made especially for you, the page says "This card uses a design made especially for you. To change it, contact support."

Colours

Each design has its own colours, used on the cover, buttons, tabs and services. If you set your own primary colour on the card, the design uses **your colour** for its accent; with the default colour the design's accent stays. The booking steps inside the booking tab keep their standard colours.

CHAPTER 6

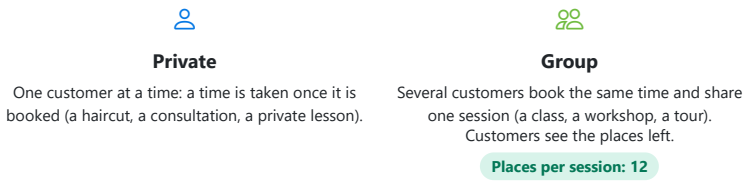
Services

What customers book — duration, price, private or group, who provides it, visibility on your card and per-service statistics.

What is a service?

A **service** is what a customer books time for: "Haircut – 30 min", "First visit – 20 min", "Yoga class – 60 min". Its duration decides how much of the calendar an appointment takes.

Two kinds: private and group



	Private	Group
Means	"One customer at a time: a time is taken once it is booked (a haircut, a consultation, a private lesson)."	"Several customers book the same time and share one session (a class, a workshop, a tour). Customers see the places left."
Capacity	1	**Places per session** (e.g. 12)
Price	Per appointment	"For a group service this is the price of ONE place: a customer booking 3 places pays 3 times this."

For a group service, **Places one customer can book** sets how many places one customer may take (for themselves and friends).

Note

"Each session takes one staff member. When a session is full and another staff member who provides this service is free, a new session opens at the same time."

The service list

Booking System → **Services** .

Tiles and chips

- Tiles: number of services (and inactive ones), **Active** (**Shown on your card**), **Bookable online** (**With a Book button**) and **Upcoming appointments** .
- Chips: **All** , **Active** , **Bookable online** , **Not bookable online** , **Inactive** .
- Filters: **Search** (**Name, category or description**), **Category** , **Business** and **Sort by** (**Display order** , **Name** , **Most booked** , **Revenue** , **Price** , **Newest**).

Each row shows duration, price (**Free** when free), the **Group session** mark, completed out of all bookings, upcoming appointments and **Last booking** . The **Online booking** switch on each row turns online booking of that service on or off.

The service menu

Button	Does
Statistics	Full statistics of the service (below)
View Bookings	Appointments of this service
Book an appointment	A new appointment with this service
Edit	The service form
Duplicate	A copy, to build a similar service quickly
Deactivate / **Activate**	Hides or shows the service on your card; existing appointments stay
Delete	Only when the service has no appointments

> ⚠ **Warning**
>
> "Has appointments, so it cannot be deleted. Deactivate it instead: the history stays."

Create or edit a service

Click **Add Service** .

Basic Information

Field	Details
Card	The business that offers the service.
Service Name	e.g. "Haircut", "Consultation", "Massage".
Category	"Groups services into tabs on your booking page."
Description	What the service includes.

Price and length

Field	Details
Duration (minutes)	"How long does this service take?"
Price	**Leave empty or 0 for free service**
Session type	**Private · one customer at a time** or group.
Places per session	Group only: "How many people one session holds."
Places one customer can book	Group only.

Staff

Staff who provide it : "Customers can choose one of them on the booking page, or let the first free one take the booking. Leave all empty when every staff member provides this service."

Appearance

Icon ("Shown when the service has no image."), **Image** and **Display order** (smaller numbers first).

Visibility and booking

Switch	Details
Active Service	"Active services are visible to customers and can be booked."
Customers can book it online	"Turn off to show the service on your card without online booking."

> **Tip**
>
> For services that need a consultation first, switch off **Customers can book it online** : the service shows on your card, the customer contacts you, and you book the appointment from the dashboard.

Service statistics

Service menu → **Statistics** . Change the range with **Period** .

Part	Meaning
Bookings / **Revenue**	Count and revenue of the period
Completion rate	Share of completed appointments and the no-show rate
Upcoming	**pending or confirmed**
Cancellation rate	Share of cancellations
Customers	Number of customers and the share who came back
Booked ahead (average)	Average time between booking and appointment
Charts	**Bookings per month** , **Revenue per month** , **Outcome** , **Busiest days and hours**
Rank	This service's share of the business's visits and revenue
By staff member / **Top customers**	Who provides or books this service most

> **Tip**
>
> **Busiest days and hours** shows when you need more hands and which hours are quiet; fill quiet hours with an offer or a shorter service.

CHAPTER 7

Staff

The people who provide your services — accounts, who does what, switching people on and off, and performance figures.

Why add staff?

- Customers can **choose who** they want.
- More capacity at once: with two staff members, two customers can book the same private service at the same time.
- Each person has **their own calendar and figures** and can see their appointments with their own account.

Working alone? You don't need staff; appointments are booked with **Any staff**.

The staff list

Booking System → **Staff**.

- **Tiles**: number of staff (and inactive ones), **Active** (**Can be booked**), **Upcoming appointments** (**With a staff member**) and **Without staff** (**Upcoming, nobody assigned**).
- **Chips**: **All**, **Active**, **Inactive**, **Never signed in**.
- **Filters**: **Search** (**Name, e-mail, phone or specialization**), **Provides** (people who provide a given service), **Business**, **Sort by** (**Name**, **Most upcoming**, **Most visits (30 days)**, **Revenue (30 days)**, **Newest**).

Each row shows the specialization, the services they provide (or **every service nobody else is assigned to**), today's and upcoming appointments, and visits and revenue of the last 30 days. **Never signed in** means "They have not signed in to see their appointments yet."

Add a staff member

Click **Add Staff**:

Field	Details
Card	The business they work for.
First name / Last name	The name customers see.
Email	"They sign in with this email to see their appointments." An existing account with this e-mail is linked; otherwise a new staff account is created.
Mobile number	"Used for appointment reminders by SMS."
Specialization	e.g. "Hair stylist", "Doctor", "Consultant".
Services they provide	"Customers can book them for these services. A service nobody is assigned to can be done by every staff member."
Active	"Inactive staff won't be available for new appointments"

Note

"This account also works for another business, so only its specialization and status can be changed here."

How services and staff connect

Setting	Result
The service has nobody assigned	Every active staff member provides it.
The service has some people assigned	Only they do; "any staff" means any of them.
The customer picks "any staff"	The appointment goes to the free provider with the fewest bookings that day.

You can set this both on the staff form (**Services they provide**) and on the service form (**Staff who provide it**).

Where staff see their appointments

Staff sign in with the e-mail you entered and see their own appointments in the staff panel. If you switch on staff SMS reminders (chapter Notifications), they also get a text before each appointment.

Deactivate or delete

- **Deactivate** : no new bookings for them; their current appointments stay with them until you reassign them (by editing each appointment).
- **Delete** : only for someone without any appointments; otherwise deactivate.

Staff statistics

Staff menu → **Statistics** :

- **Appointments** , **Revenue** , **Completed visits** (and hours worked), **Upcoming** , **Completion rate** , **Average per visit** , **Customers** (and the share who came back).
- Monthly charts, **Outcome** , **Busiest days and hours** , rank among staff.
- **By service** , **Next appointments** and **Top customers** .

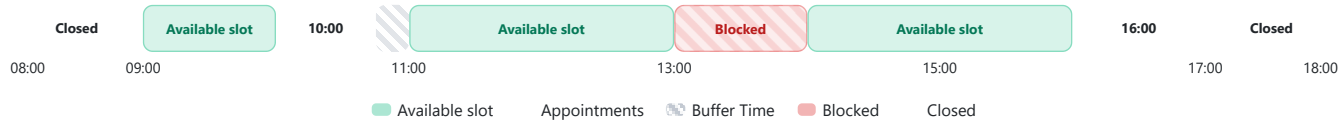
CHAPTER 8

Opening hours, time slots and blocked times

Exactly when customers can book — weekly opening hours, time slots for special days, and blocking holidays and meetings.

How free times are worked out

For every day, the system finds the bookable times like this:



1. **The day's open window**:
   - If you created **time slots** for that day, customers book only inside its available slots (that day's opening hours are ignored — slots can even open a closed day).
   - If the day has no slots, the **weekly opening hours** of that weekday apply.
2. **Blocked times** are taken out (holiday, meeting, lunch; once or weekly).
3. **Existing appointments** and the **gap between appointments** (**Buffer Time**) are taken out.
4. **Capacity**: in a private service each staff member has one appointment at a time; in a group service up to the session's places.
5. **The daily limit** (**Max Daily**) and **how far ahead** (**Advance Days**) apply.

Start times are offered in steps of **Slot Duration** (e.g. every 30 minutes), and each appointment lasts as long as its service.

> **Note**
>
> The same rules apply on the customer's booking page, the dashboard's appointment form and the reschedule dialog: what customers see as free, you see as free.

Weekly opening hours

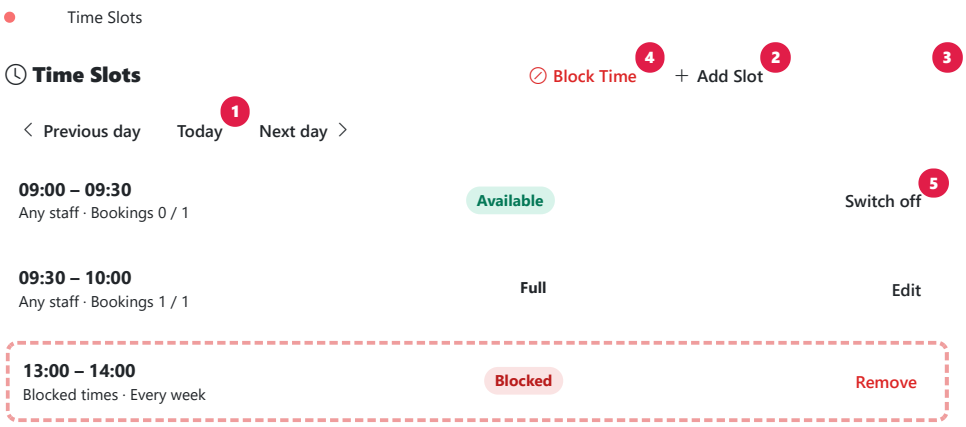
Booking settings → your business → section **Business hours** .

- Enter opening and closing times for each day, or switch on **Closed all day** .
- **Set All Open** opens every day.
- **Copy Mon-Fri** : **Copy Monday hours to Tuesday to Friday** .
- Today is marked **Today** .

Details in Settings.

The Time Slots page

Booking System → **Time Slots** . This page shows **one day**.



1 **Day navigation**: **Previous day** , **Today** , **Next day** or pick a **Date** . With several businesses, choose the **Business** .

2 **Add Slot** : one slot on this day.

3 **Generate Slots** : many slots with one form.

4 **Block Time** : close a period for booking.

5 **Per slot**: **Switch off** / **Switch on** , **Edit** , **Delete** .

A message above the list tells you how the day works:

Message	Means
"This day has time slots: customers can book only inside the available ones (opening hours do not apply)."	The day has slots.
"No time slots on this day: customers book within your opening hours"	The weekly opening hours apply.
"Closed on this day (opening hours). Add time slots to open it for bookings."	The day is closed by the opening hours.

The day's timeline colours **Available slot** , **Switched off / full** , **Blocked** and **Appointments** ; "Click to add a slot, drag to block time."

Add one slot

Field	Details
Card	The business.
Staff Member	**Leave empty for any staff** ; pick someone to make the slot theirs only.
Date	The day.
Start Time / **End Time**	"End at 00:00 for a slot until midnight. More than 1 = a group session: that many bookings at the same time."
Max Capacity	Bookings at the same time; 1 = one person.
Available for Booking	Off = the slot exists but nobody can book it.

Generate many slots

Generate Slots fills a day with regular slots (e.g. 9:00–17:00 every 30 minutes):

Field	Details
Start Time / **End Time**	The day's range
Slot Duration (minutes)	Length of each slot
Buffer Time (minutes)	**Gap between slots**
Max Capacity per Slot	Capacity of each slot
Staff Member	Optional
Exclude Lunch Break	With **Lunch Start** and **Lunch End**

The preview counts the slots. "Slots that overlap existing ones are skipped."

Block time

Block Time: "Nobody can book in this time. Booked appointments stay."

Field	Details
Staff Member	**Leave empty to block for all staff**
Start Time / **End Time**	Or **All day**
Reason	**e.g., Staff meeting, Holiday**
Repeat every week	"If checked, this block will repeat every week on the same day and time."

The day's blocks are listed under **Blocked times** (with **Every week** on repeating ones) and removed with **Remove**.

> ⚠ **Warning**
>
> Removing a weekly block removes it from **every week**.

Which tool for which job?

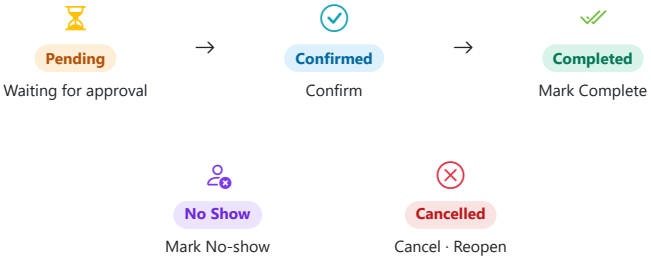
You want...	Tool
Your normal week	**Business hours** in the settings
One day off (holiday, leave)	**Block Time** with **All day**
Lunch every day	**Block Time** with **Repeat every week** for each working day
To open on one Sunday	**Add Slot** on that Sunday
Only a few set hours on one day	Slots on that day
A group class at 18:00 for 10 people	A group service, or a slot with **Max Capacity** = 10
A staff member on leave	**Block Time** with that staff member

CHAPTER 9

Appointments

The appointment list — confirm, complete, no-show, move, remind, message, notes, booking from the dashboard, cancelling and deleting.

The life of an appointment

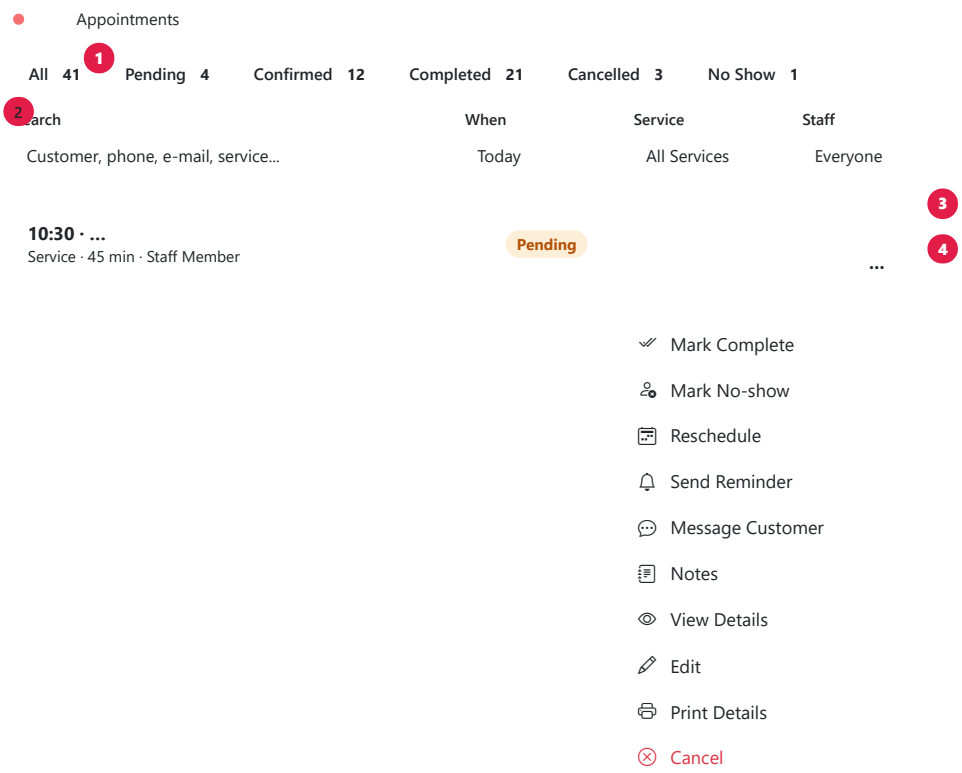


Status	Means	Comes from
Pending	Waiting for your approval	Manual approval is on, or the customer reached the no-show limit
Confirmed	Settled	An online booking without manual approval, or after **Confirm**
Completed	Done	After the visit, with **Mark Complete**
No Show	The customer did not come	With **Mark No-show**
Cancelled	Called off	By you or the customer; **Reopen** brings it back if the time is still free

> **Important**
>
> **Complete** every appointment after the visit: "Use this after the visit took place. It counts toward your revenue and the customer can review the visit." Record no-shows too: "The customer did not come. No-shows lower the trust score of the customer." "Completed and No-show can be set only after the appointment has started."

The appointment list

Booking System → **Appointments** .



1 **Status chips**: **All** , **Pending** , **Confirmed** , **Completed** , **Cancelled** , **No Show** .

2 **Search and filters**:

Filter	Options
Search	“Customer, phone, e-mail, service...”
When	**Any time** , **Today** , **Upcoming** (soonest first), **Past**
Service	**All Services** or one service
Staff	**Everyone** , one person, or **Without staff**
Business	With several cards
Date range	**From Date** and **To Date**

1 **The row's main button**: the usual next step (e.g. **Confirm** for a pending appointment).

2 **The action menu**: everything else (table below).

Every action on an appointment

Action	When	Does
Confirm	**Pending** appointments	"The appointment becomes confirmed and stays on your calendar."
Mark Complete	After the visit	Counts as revenue; the customer can rate the visit.
Mark No-show	The customer did not come	Lowers the customer's trust score.
Reschedule	"Only pending or confirmed appointments can be moved"	A dialog to pick a free day and time.
Send Reminder	"Only for upcoming pending or confirmed appointments"	"The customer gets the appointment time, place and your contact details now."
Message Customer	Any time	"Send a short message about this appointment."
Notes	Any time	The appointment's internal notes.
View Details / **Edit** / **Print Details**	Any time	Detail page, edit form, printable copy.
Cancel	Open appointments	"The time becomes free for other bookings. You can reopen the appointment later if it is still free."
Reopen	Cancelled appointments	"It becomes confirmed again, if its time is still free."

Every dialog that informs the customer has **Send by**: **E-mail**, **SMS** or both, plus an optional message. If the customer gave no e-mail or phone, that option is disabled.

Move an appointment

1. **Click** **Reschedule**.
2. **Pick the day** (**Today** or **Another day**).
3. **Pick one of the** **Free times**: "Only free times are shown: your opening hours, other appointments with their buffer time, blocked times and the daily limit are already taken into account."
4. **Choose the channel** and click **Move Appointment**.

The appointment page

Click an appointment:

- **Header**: reference, when it was booked, status and the main buttons; **More** holds **Delete**.
- **Summary**: service, duration, places (group), timing ("in 3 hours" or "2 days ago"), **Staff Member** (**Any available**), business.
- **Quick Actions**: **Send Reminder**, **Reschedule**, **Message Customer**, **Generate Invoice** or **Payment Receipt**, **Print Details**, **Edit**.
- **Notes**: "No notes yet. Add preparation details or the special requests of the customer."
- **Appointment Timeline**: booked, confirmed, reminders sent, cancelled with reason, and the appointment time.
- **Customer**: contact (**Call**, **E-mail**), **Trust Score**, visits, **Done**, **No Show** and the **This customer is blocked** warning.
- **Payment**: amount and payment status (when paid online).
- **Other appointments**: this customer's other appointments.

Book from the dashboard (phone or walk-in)

Click **New Appointment**:

1. **Business**: "Its services, staff and customers are listed below."
2. **Session type**: "Private: one customer at a time. Group: several customers book the same session."
3. **Service**.
4. **Customer**: pick from the list, or "Leave the list above empty and fill in the new customer:" name, phone, e-mail.
5. **Staff Member**: **Leave empty for any available staff**; the system then assigns a free staff member.
6. **Day and Free times**: "Only a free time can be chosen: opening hours or time slots, breaks, buffers and staff capacity count, as on your booking page." "The end follows from the service's duration."
7. **Places** (group only): "For a group session: how many places this booking takes."
8. **Status**: pending or confirmed.
9. **Notes** and **Send the customer a confirmation by** e-mail/SMS; "Sent only to the addresses the customer has."

> **Tip**
>
> For a deliberate exception (squeezing in a regular after hours), tick **Fit in outside the free times**: "Ignore opening hours, breaks and buffers for this booking. It still cannot overlap a booking that has no room left."

Edit an appointment

The same form, except: "A booking keeps its customer. To book someone else, create a new appointment." If you change the time, **If the time changes, tell the customer by** e-mail/SMS. A cancellation reason is **Kept only when the status is Cancelled**.

Cancel or delete?

	Cancel (Cancel **)**	**Delete (** Delete **)**
Frees the time	Yes	Yes
Stays in reports and customer history	Yes	No
Can be undone	Yes (**Reopen**)	No
Message to the customer	With reason and channel	No

"Delete this appointment permanently? Its history is lost. To keep it in your reports, cancel it instead."

CHAPTER 10

Customers

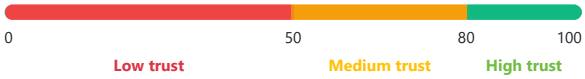
Everyone who booked with you — history, trust score, private notes, contact and blocking.

Where customers come from

"Customers appear here after their first booking on your card." A customer is recognised by phone number or e-mail; a new booking from them joins the same record. Customers you book from the dashboard show up here too.

Trust score

Every customer has a **trust score** from 0 to 100, starting at 50: "Completed visits raise the score; cancellations and no-shows lower it."



Event	Effect
Each completed visit	+5
Each cancellation	−10
Each no-show	−15

Level	Score
High trust	80 and above
Medium trust	50 to 79
Low trust	below 50

> **Tip**
> A low score alone does not stop anyone from booking. To limit unreliable customers automatically, see **Booking protection** in Settings.

The customer list

Booking System → **Customers**.

- **Chips**: **All**, **High trust**, **Medium trust**, **Low trust**, **Blocked**.
- **Filters**: **Search** (**Name, phone or e-mail**), **Business**, **Sort by** (**Last visit**, **Most visits**, **Highest trust**, **Lowest trust**, **Name**).
- **Each row**: name and contact, trust score, **Completed**, **Cancelled** and **No Show** counts, amount **Spent**, upcoming appointments and **Last visit**.

The customer menu

Button	Does
Profile	The customer's full record
Call / **Send SMS** / **Send Email**	Contact straight from your phone or mail app
Copy Contact Info	Copies name, phone and e-mail
New Appointment	A new appointment for this customer
Block Customer / **Unblock Customer**	Block or unblock

The customer record

Click a customer's name:

- **Contact** : phone and e-mail (marked **Verified** when confirmed).
- **Figures**: **Trust Score** , show-up rate, **Missed** (cancelled and no-show), completed visits and orders, total spent.
- **Next appointment** and the latest appointments (**View all** lists all of theirs on the appointments page).
- **Orders** : when the same customer also ordered from your restaurant menu.
- **Customer Information** : **Date of Birth** , **Joined** .
- **Internal Notes** : "Only you and your staff see these." For example "latex allergy", "prefers mornings". Save with **Save Notes** .

Block a customer

"A blocked customer cannot book on your card any more. Their history stays and you can unblock them at any time."

1. **Click** **Block Customer** .
2. **Choose the** **Reason for Blocking** : **Repeated No-Shows** , **Frequent Late Cancellations** , **Inappropriate Behavior** , **Payment Issues** , **Suspected Fraud** or **Other** (with details).
3. **If needed**, tick **Cancel all pending appointments** .
4. **Confirm.** Your explanation is kept in the customer's private notes.

To unblock: **Unblock Customer** ; "This will allow the customer to make new bookings again."

ⓘ Note

A blocked customer is only kept from booking online; you can still book them from the dashboard.

CHAPTER 11

Clinics and privacy

What the clinic edition does differently: patient records, the licence check before they open, the privacy line on your card and the tools that stay away from patients.

A calm, trusted edition

People who book a doctor, dentist or psychologist share sensitive things. The **Practice & clinic** edition is built around that:

What	How
Words	the dashboard speaks of **Patients**, **Visits**, **Treatments** and **Practitioners**
Card	the **Clinic** design: calm teal on white, with a privacy line under the book button
Patient records	the **Patients** module comes right after booking in your menu
No distractions	food menu, shop, customer club, listings and photo studio are hidden
Growth offers	only SEO and a private message inbox, never shop or loyalty offers

The privacy line

Under the action strip of the **Clinic** design, every visitor reads:

> "Your details are seen only by this practice."

It is part of the design, so it appears on every card that uses it. Make it true: keep your card's **Card features** limited to what a patient needs (booking, hours, location, contact), and answer questions in a private channel rather than in public reviews.

Patient records

The **Patients** module keeps a private record per patient: notes, visits, treatment plans, documents, lab results and prescriptions, plus the visit history. Its menu:

Menu	Use
Overview	numbers and the latest activity
All Patients	the list, with **Active Patients**, **Flagged Patients** and **High Priority** views
Add New Patient	a new record
Treatment Plans	plans across all patients
Recent Activity	what changed lately
Export Data	download the records

The set-up checklist ticks **Add your first patient** once one record exists.

The licence check

Patient records are health data, so the module opens only after we confirm you are a licensed professional. When you open the module the first time, you are sent to **Professional licence**:

Profession	How it is checked
Doctors and dentists	an automatic medical council check; the module opens at once when the licence belongs to your national ID
Psychologists, therapists and others	you upload your licence or membership card; a person checks it, usually within one working day

Step by step: Professional licence. Only the patients module waits; booking and everything else work from day one.

> ⚠ **Warning**
>
> The patients module also needs a plan that includes it. Without it, the checklist step shows **See plans** .

Psychologists and therapists

Psychologists get the same clinic edition: the dashboard says **Patients** and **Visits** . Name your services the way you talk to clients ("First session", "Couples session"): the names you write appear on the card unchanged.

Online and in-person visits

Write in the service description whether a visit is online or in person, and give online visits their own service with its own length and price. Reminders and confirmations go out as set in the booking notification settings.

CHAPTER 12

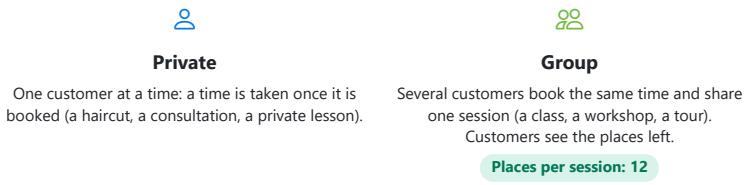
Classes, group sessions and events

Group classes for gyms and schools, and ticketed events: places per session, places per booking, price per place and event dates.

One tool for classes, workshops and tours

A yoga class, a language course, a cooking workshop and a city tour have the same shape: **many people book the same time**. In Cardynex that is a **group service**. Gyms, teachers and event hosts all use it:

Trade	A group service is	Visitors see
Gym & fitness	a class (spinning, yoga, boot camp)	Book a class
Teaching	a group course or class	Book a lesson
Events & workshops	an event (workshop, tour, meetup)	Get tickets



Make a service a group session

Open Services → new service (or edit one) and fill in:

Field	Set it to
Session type	Group
Places per session	how many people one session holds (2 to 1000)
Places one customer can book	how many places one booking may take, for someone bringing friends
Price	the price of **one place**
Duration (minutes)	the length of the session

One booking can never take more places than a session has. A customer booking 3 places pays 3 times the price, and your service statistics count it that way. All fields: Services.

How places fill up

- Everyone who books the same start time joins the **same session**.
- The session takes its staff member (coach, teacher, host) once, however many people join.
- Visitors see the places left while booking; when none are left, that time is no longer offered.
- On your card, group services carry the **Group** mark in the services strip.

Dates for events

A workshop on Saturday 10:00 and a tour every Tuesday evening are **time slots**. On a day that has time slots, only those times can be booked, so add the exact dates and start times of your events:

1. **Open** Time slots.
2. **Add one slot** per date, or **generate** a series (every Tuesday for two months).
3. **Check** your card: the event shows under **Upcoming events** and the booking tab offers only those dates.

How free times are worked out, and when to use slots, weekly hours or blocked time: Hours and time slots.

> **Tip**
>
> For a class that runs every week at fixed times, weekly opening hours plus the service length are often enough; use time slots when the dates change or only a few dates exist.

Tickets and attendees

In the events edition a booking is called a **Ticket** and the people are **Attendees**. Each ticket lands in Appointments with its places, and every attendee in your customer list. Use the appointment list filters to see everyone booked for one date.

Showing past events

The **Stage** design has a **Past events** button that opens your card's gallery. Switch on the gallery on your card and add photos of earlier events: it is the best argument for the next date.

CHAPTER 13

Booking settings

Opening hours, booking rules (length, gaps, daily limit, manual approval) and protection against abusive bookings — per business.

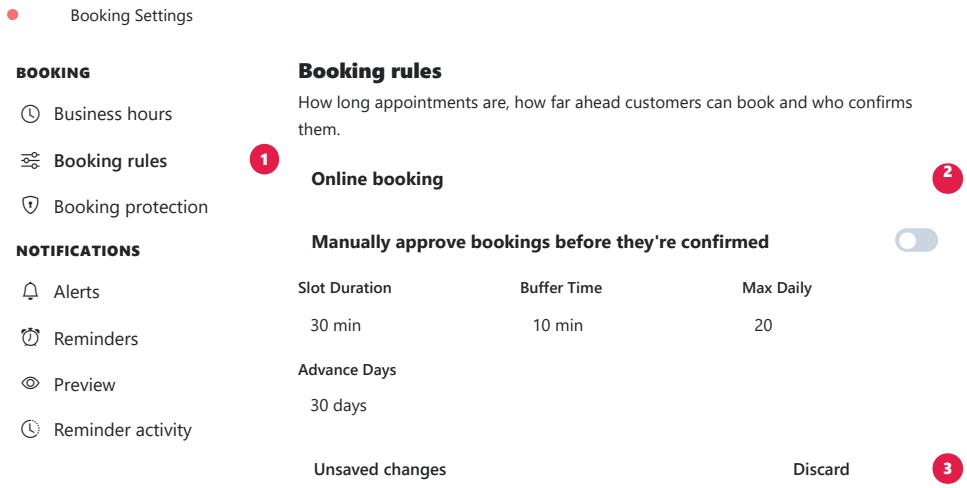
The settings list

Booking System → **Settings**. You see one settings card for every card with booking switched on.

- **Tiles**: **Businesses** (and how many have booking off), **Booking on** (**Taking online bookings**), **Waiting for approval** (**Upcoming, not confirmed yet**) and **Upcoming appointments**.
- **Chips**: **All**, **Booking on**, **Booking off**, **Manual approval**, **Waiting for approval**.
- **Filters**: **Search** (**Business name**), **Open on** (businesses open on a weekday), **Alerts** (**Email + SMS**, **Email only**, **SMS only**, **No alerts**) and **Sort by** (**Name**, **Most upcoming**, **Most waiting for approval**, **Most open days**).

Each card shows today's state (**Open today** or **Closed today**), the week strip, **Slot Duration**, **Buffer Time**, **Max Daily**, **Advance Days**, the approval mode (**Manual approval** or **Instant confirmation**) and the alert channels. The links **Hours & booking rules**, **Booking protection** and **Notifications & reminders** open that section directly.

The settings page of one business



1 **Sections**: the **Booking** group (**Business hours**, **Booking rules**, **Booking protection**) and the **Notifications** group (**Alerts**, **Reminders**, **Preview**, **Reminder activity**). Tabs at the top on a phone.

2 **The section's fields**.

3 **Save bar**: **Unsaved changes** with **Save** and **Discard**; after saving, **All changes saved**.

Switch business takes you to another business's settings. Notifications are covered in Notifications and reminders.

Business hours

Control	Does
Open / close time per day	The day's working hours
Closed all day	The day is closed
Set All Open	Every day open
Copy Mon-Fri	Copy Monday hours to Tuesday to Friday

Note

A day with its own slots on the Time Slots page follows those slots, not these hours.

Booking rules

"How long appointments are, how far ahead customers can book and who confirms them."

Setting	Details
Online booking	"Off: your card says online booking is paused and nobody can book online. You can still add appointments here in the dashboard."
"Manually approve bookings before they're confirmed"	On = online bookings arrive as **Pending** until you confirm them.
Contact verification	**Always on** : "Customers always confirm their phone number or email with a one-time code before a booking is saved."
Appointment Duration (minutes)	The step between start times (e.g. every 30 minutes) and the default length of a service without a duration.
Buffer Time Between Appointments (minutes)	Free minutes after each appointment for preparing or cleaning.
Maximum Daily Appointments	"Online bookings stop for a day once it has this many."
Advance Booking Days	How many days ahead customers can book.

Tip

If appointments are packed back to back and you always run late, set a **Buffer Time** of 5–10 minutes.

Booking protection

"Customers are recognised by phone number or email, so a new email does not reset these limits. Customers you blacklist (Customers page) cannot book online. 0 turns a limit off."

Limits per customer

Setting	Default	Details
Upcoming appointments per customer	3	"Upcoming appointments one customer may hold at once (0 = no limit)"
Bookings per customer in 24 hours	5	"Bookings one customer may make in 24 hours (0 = no limit)"

No-shows

Setting	Default	Details
No-shows before action	2	"No-shows that trigger the action below (0 = ignore no-shows)"
No-show period (days)	90	**Count no-shows from this many past days**
When a customer reaches the no-show limit	**Accept as a request I approve**	""Accept as a request I approve" books the appointment as pending, so you decide; "Refuse online booking" asks the customer to contact you."

Changes by customers

What customers may do themselves under *My bookings* in their account. Both switches are on by default, with a 24-hour deadline and at most 2 moves per booking.

Setting	Details
Customers can cancel	"Customers can cancel an upcoming booking in their account."
Customers can move their booking	"Customers can move an upcoming booking to another free time in their account."
Changes allowed until (hours before)	"Until how many hours before the start customers may cancel or move a booking (0 = until it starts). After that they contact you."
Moves per booking	"How many times a customer may move the same booking (0 = no limit)."

"A moved booking keeps its staff member and takes only times your booking page offers. With manual confirmation on, it waits for you again. You can always change any booking from your dashboard." You hear about every cancellation through your booking alerts.

CHAPTER 14

Notifications and reminders

E-mail and SMS for new bookings and cancellations, automatic reminders, quiet hours, your own wording, testing and the delivery log.

Where is it?

Booking settings → the business card → **Notifications & reminders** . Four sections: **Alerts** , **Reminders** , **Preview** and **Reminder activity** .

Alerts : channels and events

E-mail

Switch	Details
Enable Email Notifications	**Master switch for all email notifications**
Email on New Booking	On every new booking
Email on Cancellation	On every cancellation
Email Reminders	E-mail reminders before appointments

SMS

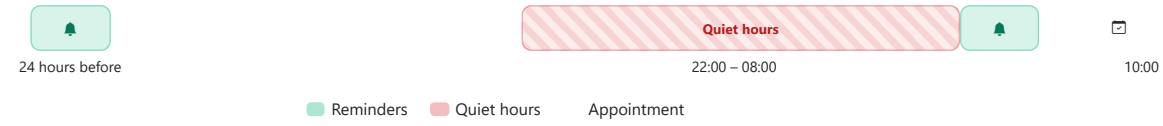
Switch	Details
Enable SMS Notifications	**Master switch for all SMS notifications** "Each SMS uses credit."
SMS on New Booking	On every new booking
SMS Reminders	SMS reminders before appointments

Note

A channel's master switch overrides the switches below it; with **Enable SMS Notifications** off, no SMS is sent at all — not even reminders.

Reminders

"Reminders go out by email and/or SMS, as switched on above (Email Reminders / SMS Reminders)."



Setting	Details
Send reminders	"You can pick more than one, e.g. a day before and 2 hours before": **3 days before**, **2 days before**, **24 hours before**, **12 hours before**, **6 hours before**, **3 hours before**, **2 hours before**, **1 hour before**.
"Also remind appointments still waiting for my confirmation"	"Off: only confirmed appointments are reminded."
Don't send reminders during quiet hours	With **Quiet hours start** and **Quiet hours end** (22:00–08:00 by default). "In your business time zone. A reminder due in this window is sent just before it starts instead (or when it ends, if the booking was made later)."

"A reminder that would fall before the booking was made is skipped, because the customer just got the confirmation."

Reminders for your team (SMS)

- "Send me (the owner) an SMS before each appointment"
- "Send the assigned staff member an SMS before each appointment"

"Uses the mobile number in each person's profile and needs SMS Reminders on. Each SMS uses credit."

Wording: your own reminder SMS

Custom reminder SMS (optional) — up to 300 characters. "Leave empty for the standard text in the card's language. You can use:"

Placeholder	Replaced by
`{customer}`	Customer name
`{business}`	Business name
`{service}`	Service name
`{day}`	Weekday
`{date}`	Date
`{time}`	Time
`{staff}`	Staff member

Example: `Hi {customer}, a reminder of your {service} at {business} on {day} {date} at {time}.`

> ⚠ **Warning**
>
> Use only these placeholders; a wrong name (say `{name}`) is refused when you save.

Test & status

- **Send me a test reminder**: "Uses the saved settings and a sample appointment for tomorrow. Save your changes first." For SMS, your profile needs a mobile number (**SMS (uses 1 credit)**).
- **Scheduler status**: reminders are checked and sent every 15 minutes. If this box warns that the scheduler has not run, automatic reminders are not going out; tell support.

Preview

"This is a preview of how your notifications will appear. Actual content may vary based on the booking details." You see a sample new-booking e-mail and SMS; with both channels off: **No Notification Previews Available**.

Reminder activity

“Every reminder sent, skipped or failed for this business, newest first.”

Filter	Options
Chips	All , Sent , Failed , Skipped
Period	All time , Last 7 days , Last 30 days , Last 90 days
Channel	E-mail or SMS
Recipient	Everyone , Customers , You (owner) , Staff
Type	Automatic or Sent manually

> **Tip**
>
> When a customer says "I never got a reminder", check here whether it was sent, skipped (quiet hours, a late booking) or failed.

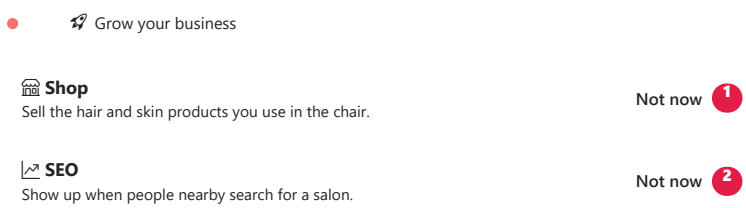
CHAPTER 15

Growing your business

The growth offers on your dashboard home, the add-on store arranged for your trade, and how a hybrid business adds tools of another trade.

Growth offers on your dashboard home

Once the set-up checklist is done, the dashboard home can show a **Grow your business** card with at most two ideas that fit your trade.



#	Offer kind	Button	Opens
1	a module sold as an add-on	**Add**	the add-on store, at **Grow your business**
2	a module that comes with a bigger plan	**See plans**	the plans page

Not now hides that offer for good; the next one, if any, takes its place. An offer also disappears by itself once your plan includes the module.

What each trade is offered

Edition	First offer	Second offer
Beauty salon	**Shop** : "Sell the hair and skin products you use in the chair."	**SEO**
Practice & clinic	**SEO** : "Help new patients find your practice on search engines."	**Message center**
Consulting	**Marketing** : "Send newsletters and offers to your clients."	**SEO**
Teaching	**Marketing** : "Announce new courses and term dates to your students."	**SEO**
Gym & fitness	**Shop** : "Sell supplements, drinks and gym wear to your members."	**Marketing**
Events & workshops	**Shop** : "Sell merchandise, kits and gift tickets from the same card."	**Marketing**

A clinic is never offered a shop or a loyalty club.

The add-on store for your trade

Add-ons is arranged in groups:

Group	Holds
For your trade	add-ons of the tools your trade uses
Grow your business	the add-ons your trade is offered, each with its one-line reason
More modules	everything else you may add

Add-ons of another trade's own tools (food menu, flashcards, photo studio, patient records) are not listed.

Hybrid businesses

Many businesses are two trades at once: a salon that sells products, a gym with a juice bar, a workshop host with merchandise. Buy the module you need, and it appears in your menu next to your trade's tools, even when your profile hides it by default. Your edition, words and card design stay the same.

> **Note**
>
> A trade's own tools (food menu, flashcards and quizzes, photo studio, patient records) are the exception: they stay with their trade. If your business really is mainly another trade, ask support to switch your edition.

CHAPTER 16

☑ Launch checklist, recipes and FAQ

What to check before your first real customers, ready-made recipes for common situations, answers and a glossary.

Before opening day

Go through this list once, on a phone, as if you were a customer:

#	Check	Where
1	Card has logo, cover photo, phone, address and correct **Working Hours**	your card
2	The card shows **Open now** during your hours and the next opening when closed	your card
3	The card uses your trade's design, or one you chose on purpose	Cards → **Card design**
4	Every service has a length and price; the most booked ones have a photo and come first	Services
5	Classes and events are group services with the right places	Services
6	Each staff member has their hours and their services	Staff
7	Booking hours are saved, and event dates exist as time slots	Settings, Time slots
8	Clinic: your licence is confirmed and the patients module opens	Professional licence
9	A test booking went all the way: booked on the card, confirmed, reminder received	your card + Appointments
10	The set-up checklist on the dashboard home is gone	dashboard home

Recipes

I want new cards to look like my trade

1. **Open** Cards → **More** → **Card design**.
2. **Preview** the designs under **For your trade**.
3. **Press** **Use this design**. New cards start with your trade's design anyway.

I want a weekly yoga class for 12 people

1. **Create a service** "Yoga" in Services: **Session type** group, **Places per session** 12, price per place.
2. **Choose the coach** under **Staff who provide it**.
3. **Set the weekly hours** in Settings, or add slots for the class times.

I want to sell tickets for a workshop on three dates

1. **Create the event** as a group service with the number of seats.
2. **Add three time slots**, one per date, in Time slots.
3. **Share your card**: visitors press **Get tickets** and choose a date.

I want each stylist to have their own calendar

1. **Add each stylist** in Staff with their working hours.
2. **Tick who provides what** under **Staff who provide it** on each service.
3. **Done**: customers can pick a stylist or take whoever is free.

I want patient records

1. **Open** the patients module from your menu.
2. **Confirm your licence** when asked (Professional licence).
3. **Add your first patient** with **Add New Patient**.

I also sell products

1. **Open** Add-ons and look under **Grow your business**.
2. **Add** the shop module. It appears in your menu next to booking.
3. **Switch on** the online shop on your card and add your products.

FAQ

Can I change my edition later? Yes. Support can switch your edition or put you back on the general dashboard. Nothing is deleted; only the menu, words, offers and the default design change.

I am a teacher but my dashboard is general. Teachers who signed up before the teaching edition existed stay general. Buy the teaching package, or ask support to switch you to **Teaching**.

Why can't I see the food menu or flashcards? They belong to another trade's edition. Even with a plan that includes them, they stay with that trade.

I bought a module my edition hides. Where is it? In your menu, next to your trade's tools. A hybrid business sees every general tool it pays for.

Do the trade words change what my customers see? The words are for your dashboard. Your card shows your own service names and the design's labels, such as **Book a class**.

Can I remove the privacy line of the Clinic design? No, it is part of the design. Choose **Studio** if you prefer a card without it.

I dismissed an offer by mistake. The add-on store still lists the module under **Grow your business** or **More modules**.

Glossary

Term	Meaning
Edition	the face of Cardynex for one trade: menu order, hidden tools, words, design and checklist
Trade profile	the description of one edition
Hidden tool	a tool your profile leaves out of the menu and store
Trade's own tool	a tool only one trade can use (food menu, flashcards, photo studio, patient records)
Hybrid business	a business that adds a tool of another trade, for example a salon with a shop
Group service	a service that several people book at the same time
Place	one seat in a group session; the price of a group service is per place
Growth offer	one of the two ideas on your dashboard home once set-up is done

CHAPTER 17

How-tos, FAQ and glossary

"I want to…" — short recipes for everyday booking tasks, fixes for common problems and what the terms mean.

How-tos: "I want to…"

…close tomorrow

Time Slots → tomorrow → **Block Time** → **All day**, reason "Closed". Appointments already booked stay; move or cancel them in Appointments.

…take lunch from 13:00 to 14:00 every day

Create a **Block Time** from 13:00 to 14:00 with **Repeat every week** for each working day.

…approve every booking myself

Settings → **Booking rules** → "Manually approve bookings before they're confirmed". New appointments collect under the **Pending** chip.

…pause online booking for a while (holiday, renovation)

Booking rules → switch off **Online booking**. Your card says online booking is paused; you can still book from the dashboard.

…run a group class for 10 people

A new service with a group **Session type** and **Places per session** = 10. If the class only runs on certain days, create slots for those days.

…take a booking over the phone

Appointments → **New Appointment**; pick or enter the customer, click one of the **Free times**, **Status** = confirmed, and send the confirmation by SMS.

…move a customer's appointment to tomorrow

The appointment → **Reschedule** → **Another day** → a free time → the channel → **Move Appointment**.

…reduce no-shows

1. **Switch on reminders** 24 hours and 2 hours before.
2. **After each no-show**, click **Mark No-show** so the trust score drops.
3. **In** **Booking protection** set **No-shows before action** = 2 and **When a customer reaches the no-show limit** = **Accept as a request I approve**.
4. **Block a habitual no-show** in Customers.

…add a new staff member

Staff → **Add Staff**; enter their e-mail so they can see their appointments, and tick their services.

FAQ and troubleshooting

A customer sees a day I'm open as "full" or "closed". Check in order: does the day have time slots (which replace the opening hours)? A weekly block? Is **Max Daily** reached? Is the day beyond **Advance Days**? Is a staff member who provides that service free that day?

The booking tab isn't on my card, or it says online booking is paused. Check the card's **Booking** switch, **Online booking** in the booking rules, and the service's **Active Service** and **Customers can book it online**.

I can't delete a service. A service with appointments can't be deleted; **Deactivate** it.

I can't delete a staff member. Someone with appointments can't be deleted; deactivate them and give their upcoming appointments to someone else.

A customer doesn't receive the verification code. The code goes by SMS or e-mail; they should check the number or address, look in spam and wait a few minutes. Contact verification is always on and can't be switched off.

Customers cancel or move bookings themselves. Can I stop that? Yes: Settings → **Booking protection** → **Changes by customers**. Switch off **Customers can cancel** or **Customers can move their booking**, or set how many hours before the start changes end.

I can't mark an appointment completed. "Completed and No-show can be set only after the appointment has started."

Reminders aren't going out. Look at **Reminder activity**; if nothing is logged, check the e-mail/SMS master switches, **Email Reminders** / **SMS Reminders**, the reminder times and the scheduler status under **Test & status**. Pending appointments are only reminded with "Also remind appointments still waiting for my confirmation".

Revenue is lower than expected. Only **Completed** appointments count as revenue. Complete past appointments (**When** = **Past** and the **Confirmed** chip).

Two customers got the same time. Only possible when capacity allows it: two free staff members, a group service, or a slot with **Max Capacity** above 1. Two bookings racing for the last place are refused by the system.

Glossary

Term	Meaning
Service	What customers book time for, with duration and price.
Group service	Several customers book one session together; the price is per place.
Staff member	A person who provides services and has their own calendar.
Opening hours	The open window of each weekday.
Time slot	A booking window on one specific day; when present it replaces that day's opening hours.
Blocked time	A period nobody can book; once or weekly.
Buffer time	Free minutes after each appointment.
Manual approval	Online bookings stay pending until you confirm them.
Trust score	A 0–100 measure of how reliable a customer is.
No-show	The customer did not turn up.
Quiet hours	Hours when no reminders are sent.