Bookly.ac

THE COMPLETE BUSINESS HANDBOOK

Your business. Ready to book.

Set up your company website, publish services, manage availability and handle booking payments with confidence.

Bookly Business User Guide

November 2026 edition | Illustrated step-by-step reference

Generic examples use Bookly Demo Studio.

A PRACTICAL GUIDE TO YOUR BUSINESS

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Read this way Start with setup, then payments and the customer journey. Optional original modules are clearly labelled. Missing menus can reflect your subscription or platform configuration.

A PRACTICAL GUIDE TO YOUR BUSINESS

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All examples are generic. Never publish credentials or private customer data.

Actual screenshots retain their image resolution; zoom in to inspect labels.

A PRACTICAL GUIDE TO YOUR BUSINESS

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All examples are generic. Never publish credentials or private customer data.

Actual screenshots retain their image resolution; zoom in to inspect labels.

01 / START WITH CONFIDENCE

Your first booking, end to end

Core appointment workflow

Open: /admin/dashboard/user

Bookly brings your service menu, people, availability and customer appointments together. Set up Bookly Demo Studio in the order below before sharing its public booking link.

1. Register or sign in, complete any verification and review your subscription access.
2. Add the business identity and policies. Set the correct timezone and currency before adding prices and hours.
3. Create active services, add staff and assign each service to the people who can deliver it.
4. Set business and staff working hours, breaks, locations and holidays.
5. Choose the website design, booking payment policies and valid payment methods.
6. Preview the website and make a clearly identified demo booking. Check the entire status and notification journey before launch.

> **Expected result**
> A customer can select a real service, find an available professional and understand exactly what is due now and later.

Practical tip Use a demo service and a controlled test process. A payment-provider live charge requires a deliberate financial transaction; a website preview does not prove payment processing works.

02 / START WITH CONFIDENCE

Understand the two booking experiences

Core appointment workflow

Open: https://bookly.ac/

The upgraded appointment journey is this handbook's main workflow. Bookly also retains original modules for events, products, POS and selected website features. Availability depends on the account, subscription and platform configuration.

1. Business owner: manages company settings, services, staff, availability and booking payments.
2. Staff: a scheduling resource; login access is separate and requires a configured account.
3. Customer: books an appointment and follows its payment and status instructions.
4. Use the upgraded booking and Booking payments screens together for multi-service appointments and transfer-proof review.
5. For an optional original module, follow its own screen and compatible native theme. Check its actual checkout and notification behavior separately.

> **Expected result**
> You can distinguish owner tasks, customer steps and plan-dependent modules without assuming every menu appears on every account.

Practical tip A missing module can reflect a plan limit or platform switch. Check Subscription before creating a second company.

Know the limit The upgraded wizard currently has no service-extra, coupon, custom-input, group-capacity, recurring or day-duration selection interface. Original modules do not automatically appear in the newer company designs.

03 / START WITH CONFIDENCE

Register your business

Core appointment workflow

Open: /register.html

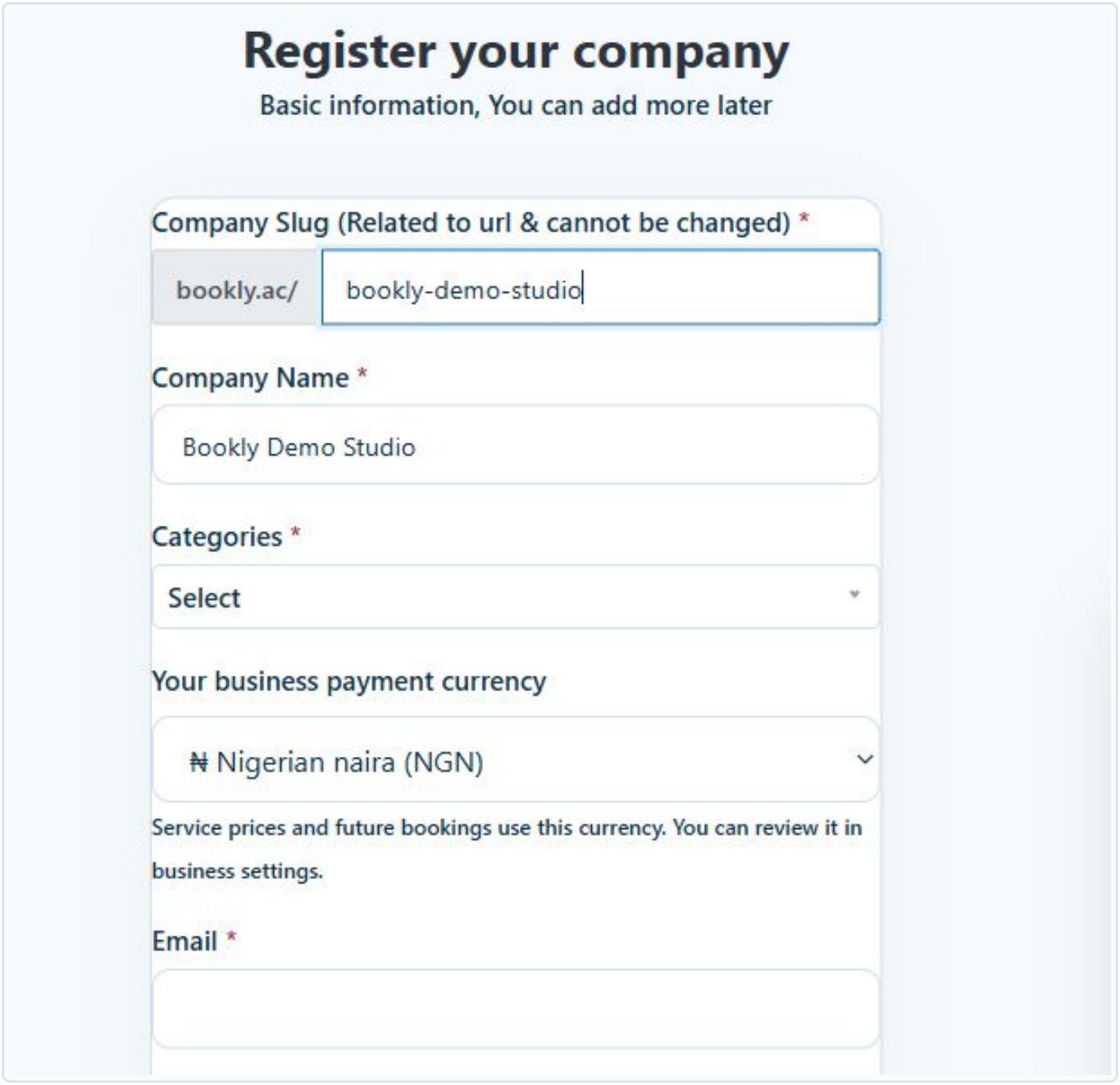
Bookly offers a limited Free plan, not a free trial. Free has no subscription charge or trial countdown. Starter, Growth and Scale add capacity and features after verified payment or an administrator assignment.

1. Choose Free or review the current paid plans, billing cycle, amount and included features on the pricing page.
2. Enter the company name and category. Choose a unique, memorable company URL such as bookly-demo-studio.
3. Enter the owner's monitored email, phone with country code and desired booking currency.
4. Set a unique password that meets the rules displayed in the secure registration form. Complete the human verification and review the displayed terms.
5. Submit and follow any email/phone verification or subscription-payment instructions. Where verification is requested, enter the four-digit code within 10 minutes and choose Verify account. Use Send a new code if needed.

Expected result
Your owner account and company are created. Activation can still depend on verification and subscription status.

Practical tip The public company URL is separate from the owner's login email. If a URL is already used or reserved, choose a different company URL. If verification expires, sign in with your password again; retry limits may require you to wait.

Know the limit Before a paid subscription checkout, complete the private Subscription profile. Birth date and optional greeting emails remain optional. A submitted payment is not verified paid access.



Reference screen; labels may vary. Follow the current instructions. Registration: company URL, name, category and booking currency.

04 / START WITH CONFIDENCE

Sign in and maintain your account

Core appointment workflow

Open: /login.html

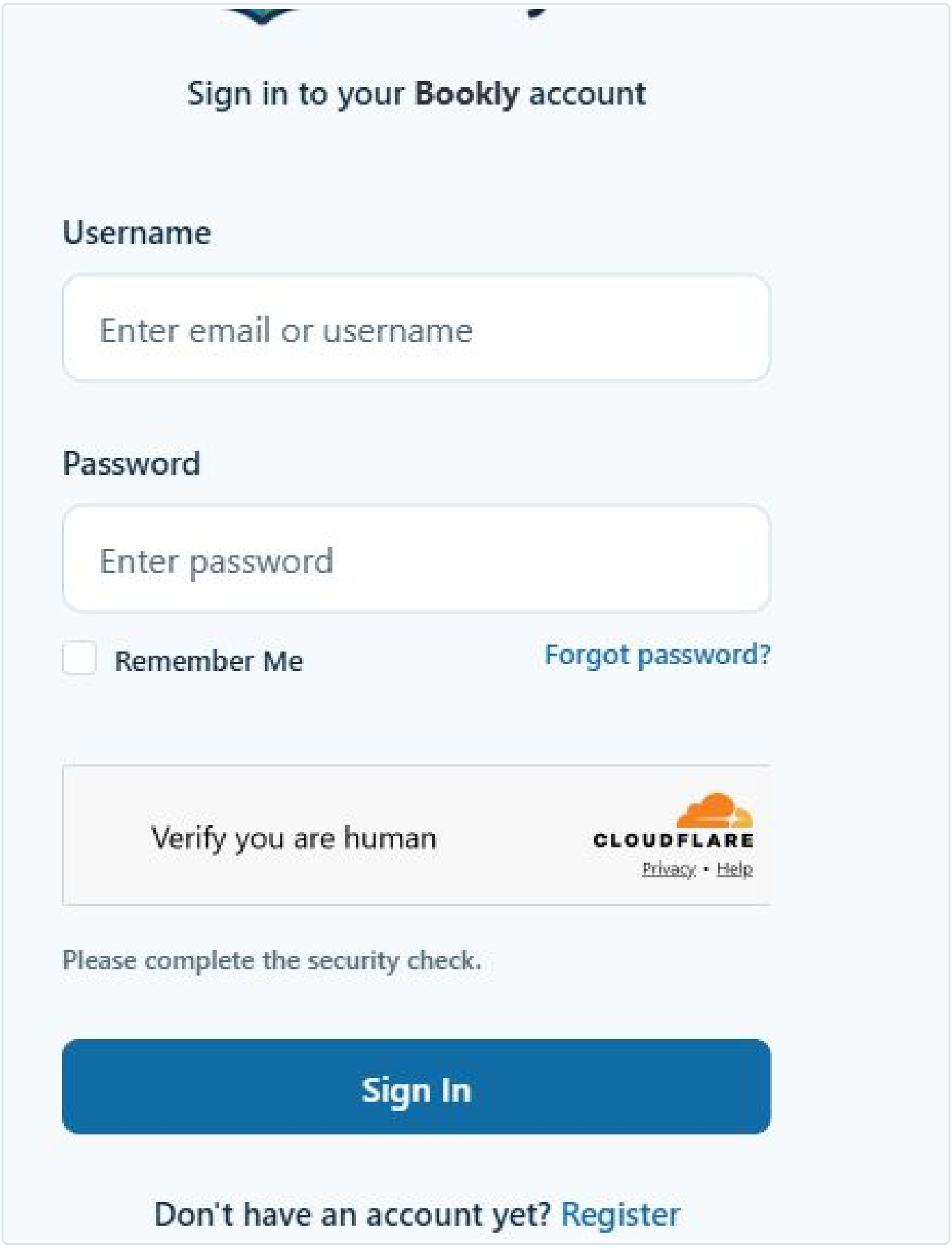
Use the owner's account to manage the business. Keep login details private and enter them only in Bookly's secure forms.

1. Open Login and enter the account credentials. Allow the security check to finish before submitting. Complete an authenticator check if enabled.
2. If email/phone verification is requested, enter the four-digit code within 10 minutes and choose Verify account. Use Send a new code when needed; an expired sign-in context requires password sign-in again.
3. After signing in, open Settings > Manage profile to review name, email, phone and profile image.
4. Use Settings > Change password to enter the current password and new password confirmation directly. Use Recover password if the current password is unknown.
5. Log out when finished on a shared device. Keep provider API secrets in their protected settings screens.

> **Expected result**
> The correct owner can access the dashboard and maintain current contact and recovery details.

Practical tip If a public form returns 429 or Too many requests, wait for the displayed retry period before trying again; avoid repeated submissions. For a stalled security check, reload once and finish verification. Report the exact page and message if it persists.

Know the limit Never email a password, security code or API secret, or place one in a public description, screenshot or page report. Verification codes do not replace an enabled authenticator. Database edits are not a normal recovery method.



Reference screen; labels may vary. Follow the current instructions. Secure sign-in: username/password, recovery and verification.

05 / START WITH CONFIDENCE

Recover a forgotten password safely

Registered business/user, staff and customer accounts; monitored recovery email required

Open: /login.html

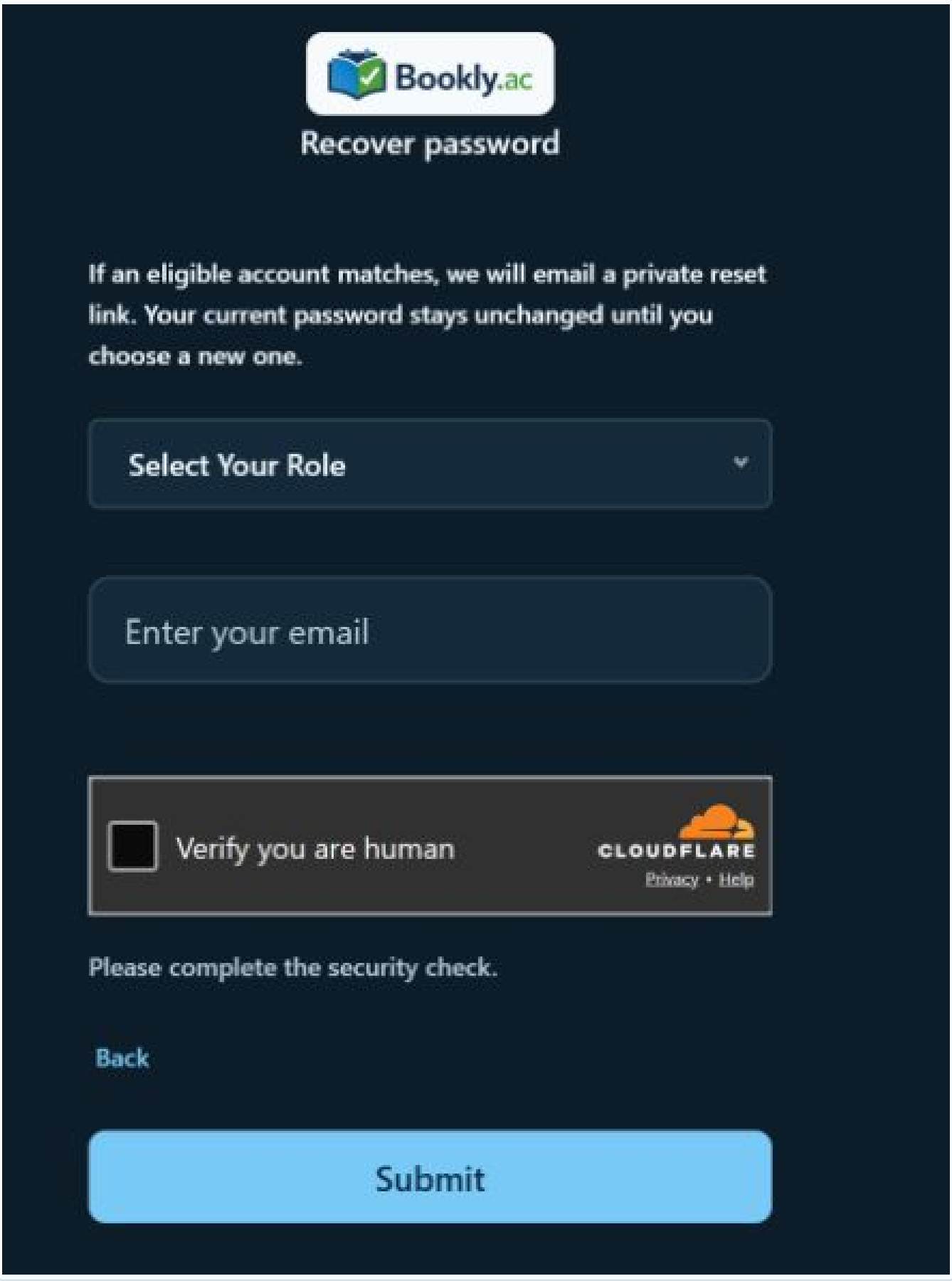
Bookly recovers access through a short-lived link sent to the account's email. Requesting or opening the link does not change the existing password; the new password is saved only after you complete the secure reset form.

1. From Login, choose Recover password. Select the correct role: business/user account, staff or customer. Enter that account's email and complete the human verification.
2. Submit the request and check the monitored inbox and spam folder. The on-screen response is generic and does not disclose whether an account exists. Request limits may require a wait.
3. Open the Bookly reset link within 30 minutes. Keep the link private; do not forward it or paste it into a page report. An expired or already-used link requires a new request.
4. In the reset form, enter and confirm a unique password of at least 10 characters. The maximum is 72 UTF-8 bytes, so some non-ASCII characters use more than one byte.
5. Submit the new password and check the completion message. A successful reset consumes that link and signs out previous sessions and remembered sign-ins.
6. Return to Login and sign in with the new password. If two-step sign-in was enabled, use a fresh authenticator code or an unused recovery code as well.

> **Expected result**
> You regain access using a one-use reset link without receiving a temporary password by email. Enabled authenticator protection stays in place.

Practical tip Choose the exact account role and email. A customer account and a business account can be separate identities. Ask support if delivery still fails or the account email is no longer accessible.

Know the limit Opening a reset link alone does not consume it or sign you in. Password recovery does not disable the authenticator or replace its recovery codes. Never send passwords, reset links, setup keys or recovery codes to support.



Reference screen; labels may vary. Follow the current instructions. Secure password-recovery request in dark mode: choose the role, enter the email and complete verification. The existing password stays unchanged until a valid reset is completed.

06 / START WITH CONFIDENCE

Protect sign-in with an authenticator app

Optional; signed-in owners, administrators, staff and customers

Open: /security

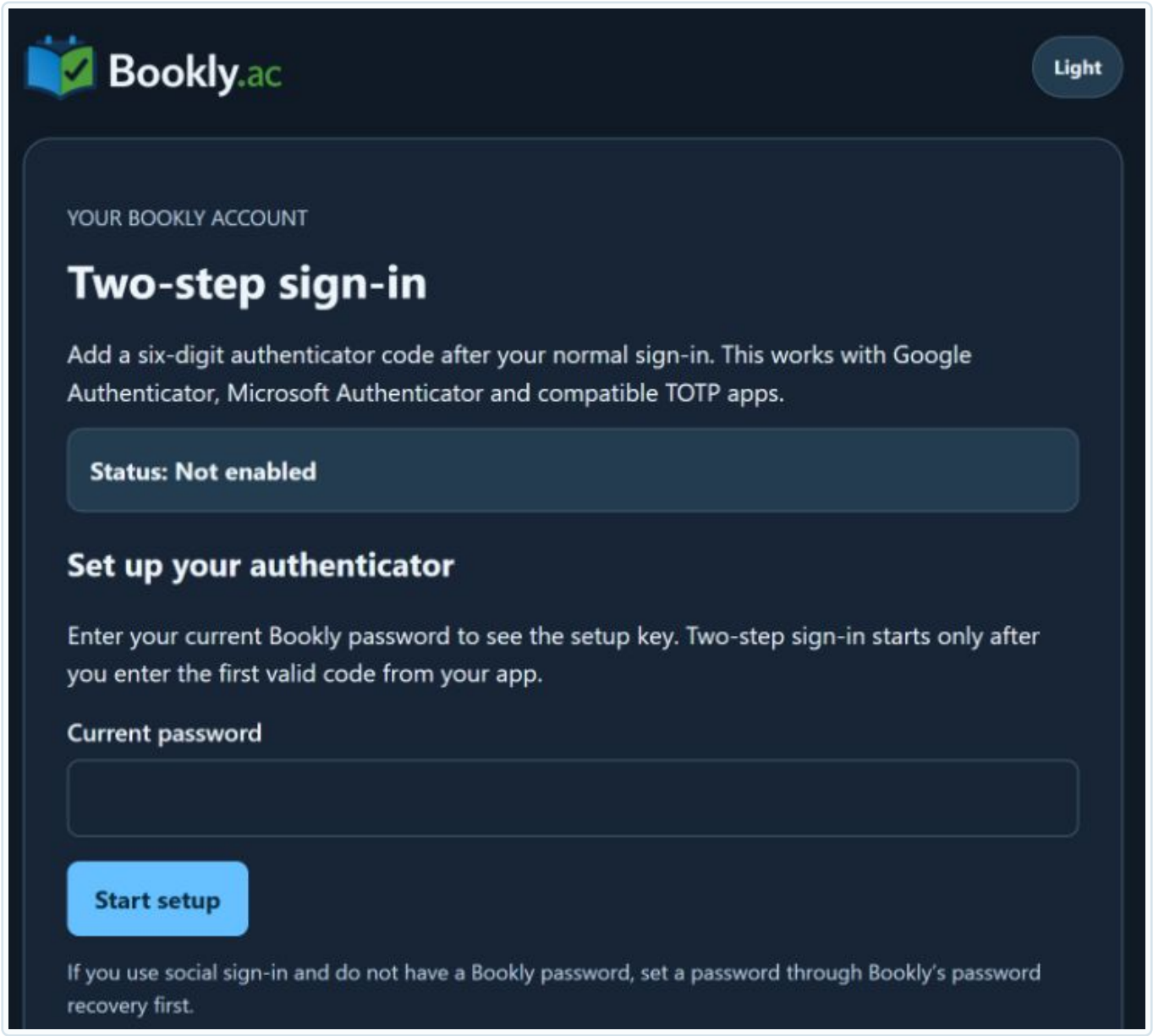
Optional Two-step sign-in adds an authenticator check after normal sign-in. It is off by default and works with Google Authenticator, Microsoft Authenticator, Authy, 2FAS and compatible time-based code apps.

1. Sign in and open Account security at /security. Review Status, then enter your current Bookly password and choose Start setup.
2. In your authenticator app, add Bookly by scanning the locally generated QR code, opening the compatible-app link or entering the displayed private setup key manually. Choose a time-based account.
3. Enter the app's six-digit code and choose Confirm and enable. Setup expires after 10 minutes; the account remains unchanged until a valid first code is confirmed.
4. Save the 10 recovery codes privately when shown. They are displayed once and each code can be used once if your authenticator is unavailable.
5. On a later sign-in, complete the normal form and enter a fresh authenticator code, or an unused recovery code, at the verification step.
6. To replace recovery codes, return to Account security and provide the current password plus a fresh authenticator code or unused recovery code. The previous recovery set becomes invalid.
7. To turn the feature off, use Disable two-step sign-in with the current password and a fresh authenticator or unused recovery code. Check the resulting account status.

> **Expected result**
> Two-step sign-in is enabled only after you prove access to the authenticator, and recovery codes provide a separate one-use fallback.

Practical tip Enable automatic date and time on your device. Codes refresh every 30 seconds and cannot be reused. Repeated incorrect attempts trigger a temporary limit. If a protected booking asks for sign-in, complete it and submit the booking again; it is not replayed automatically.

Know the limit Never share or publish the setup key, QR image or recovery codes. Bookly generates the QR locally without an external QR service. Password recovery keeps existing authenticator protection. Contact support if setup is unavailable; a social-only account needs a Bookly password first.



Reference screen; labels may vary. Follow the current instructions. Live Account security status in dark mode: infrastructure configured, two-step sign-in not enabled and current-password field empty. No setup key, QR code or recovery code is shown.

07 / START WITH CONFIDENCE

Find your way around the dashboard

Core appointment workflow

Open: /admin/dashboard/user

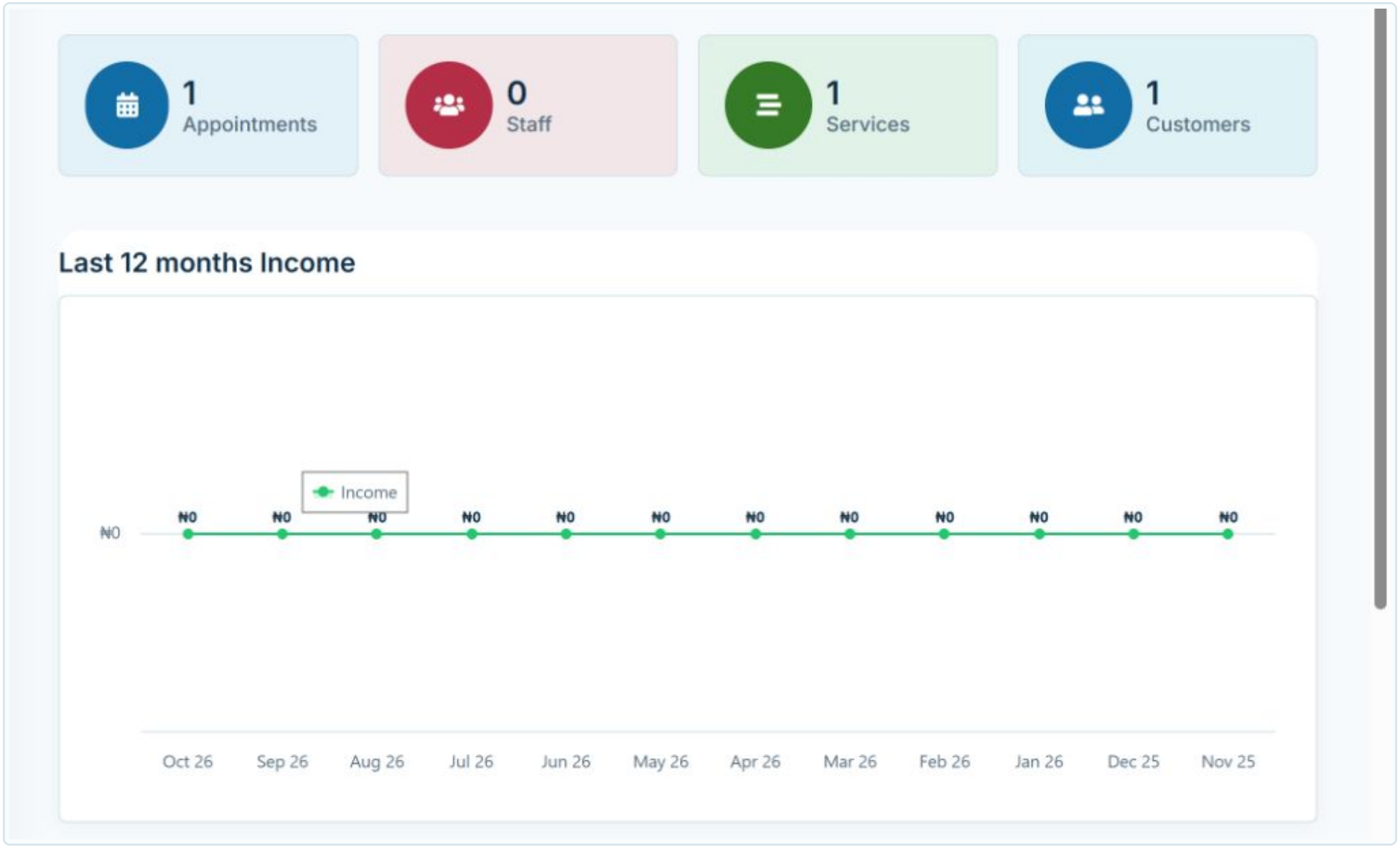
The owner dashboard is a working overview of recent appointments and business income summaries. Use the sidebar to reach the screen that owns each task.

1. Review recent appointments and the date/currency context of the income chart.
2. Open Website & booking rules for the current website design, payment policies, bank instructions and booking currency.
3. Open Booking payments to inspect upgraded appointments, transfer proofs and dedicated booking actions.
4. Use Appointments and Calendar for the original appointment lists and calendar view.
5. Use Services, Staff, Customers and Settings to maintain the records behind the public booking journey.

> **Expected result**
> You know where to configure the business and where to review an actual booking.

Practical tip Bookly studio contains earlier booking controls. Prefer Website & booking rules for the current full/deposit/on-site policy setup.

Know the limit Menu visibility depends on subscription status and enabled features. Dashboard income charts are operational summaries, not a complete bank or tax ledger.



Reference screen; labels may vary. Follow the current instructions. Demo owner overview with navigation and a sample appointment.

08 / BUILD THE BUSINESS

Add identity, contact details and branding

Core appointment workflow

Open: /admin/settings/company

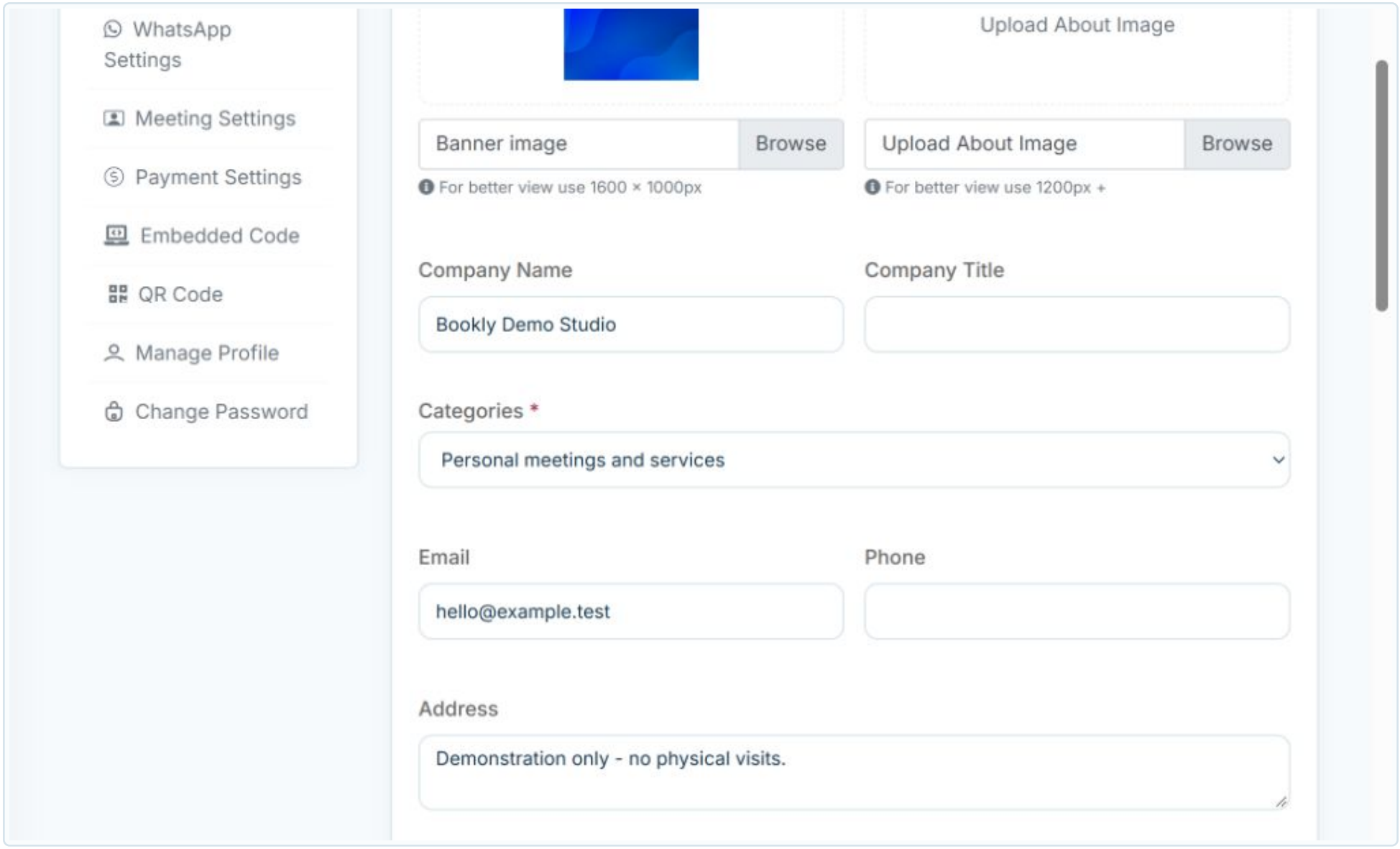
Company settings hold the business information customers rely on. Bookly Demo Studio is an example name throughout this guide; replace it with your own verified details.

1. Upload a clear company logo with a readable aspect ratio. Choose the available logo display size and suitable banner/About images.
2. Review the company name, title, category, public email, phone and address.
3. Write a short About title and description that explain your services, location and customer experience.
4. Add the established-in year or business video only when relevant and accurate.
5. Save and open the regular public company URL. Check desktop and phone layouts and both appearance modes.

> **Expected result**
> Customers can identify the business and find accurate contact information before booking.

Practical tip Publishing an email address does not create a mailbox. Use an inbox the company actually monitors.

Know the limit The company logo is separate from Bookly's platform logo. Image and content placement varies by website design; check the public page after every important change.



Reference screen; labels may vary. Follow the current instructions. Company settings: demo identity, public contact details and branding fields.

09 / BUILD THE BUSINESS

Write clear policies and useful page copy

Core appointment workflow

Open: /admin/settings/company

Concise policies make booking decisions easier. They should describe how your business actually operates, especially deposits, changes, cancellations and customer preparation.

1. Explain what each service includes and any preparation customers need before arrival.
2. Review the Terms and Conditions and Privacy Policy fields. Use wording appropriate to your business and legal obligations.
3. State the cancellation/rescheduling policy and how remaining balances or refund enquiries are handled.
4. Add accurate Facebook, Instagram, WhatsApp or other supported social links. Open each link to check its destination.
5. Review footer About copy and SEO title/description/keywords where available, then save and preview.

> **Expected result**
> The public information and booking consent refer to clear, consistent business terms.

Practical tip Keep payment instructions in the payment settings as well as any explanatory policy. A general paragraph cannot configure a working payment method.

Know the limit Some original content fields and custom pages are theme-dependent. Do not assume every native field is rendered by every newer website design.

Set timezone, formats, taxes and booking defaults

Core appointment workflow

Open: /admin/settings/general

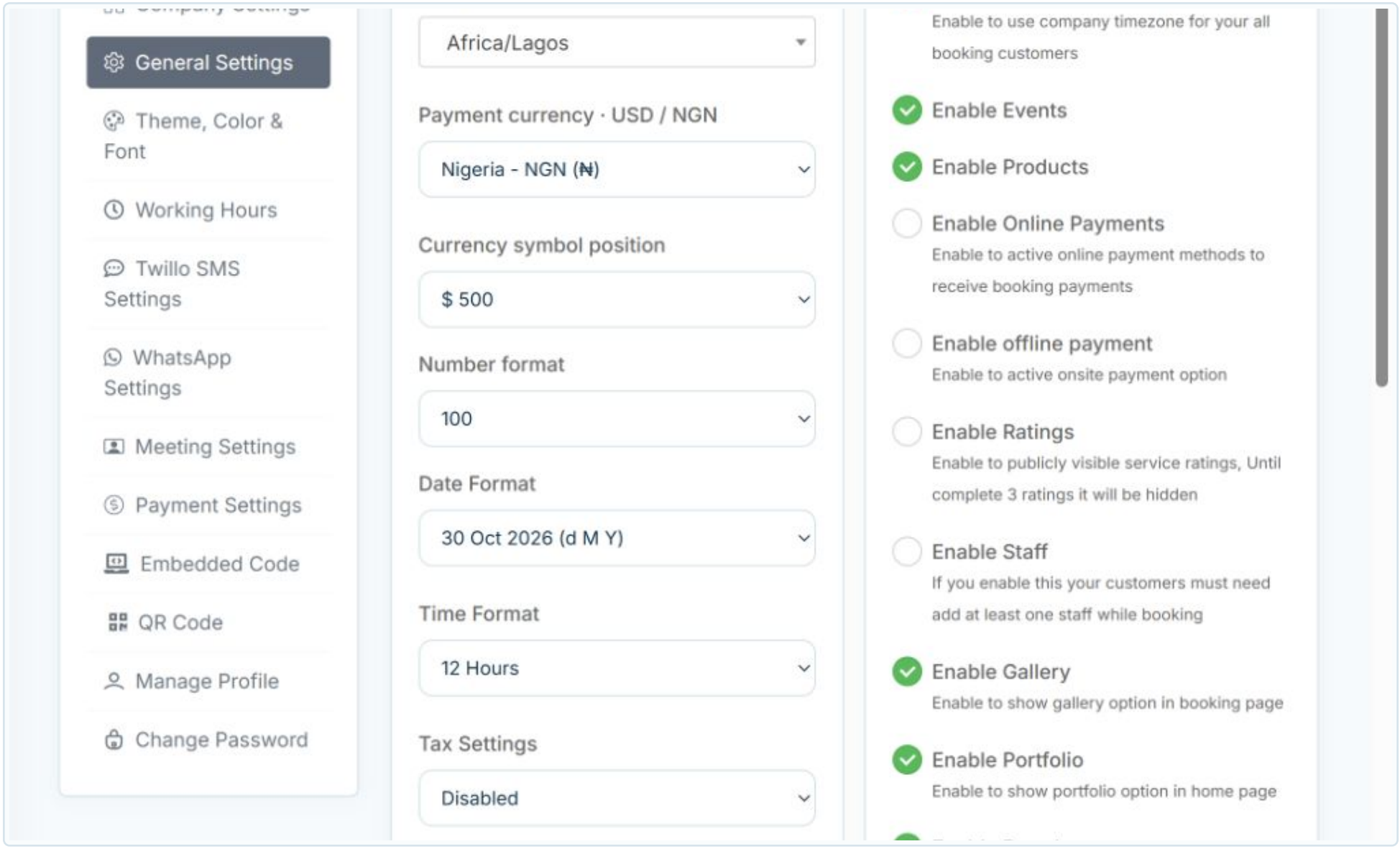
General settings control the context for your prices and schedule. Set these early, then verify a customer-facing booking after saving.

1. Choose the business timezone and the available default language, date/time and number formats.
2. Set the booking currency and its display position. Review prices whenever the currency changes.
3. Review slot interval, current-time validation and cancellation lead-time controls.
4. If appropriate, configure tax mode and the card-processing fee. Confirm the review screen displays the intended totals.
5. Enable only the modules and online/offline payment features you intend to use. Save the settings.

> **Expected result**
> Customers see a coherent schedule and consistent price formatting, with applicable configured charges shown before payment.

Practical tip Set the timezone before entering working hours. A different browser timezone does not change the business's opening hours.

Know the limit Original group, recurring and module switches do not add those selection controls to the upgraded appointment wizard. Its payment policies are configured in Website & booking rules.



Reference screen; labels may vary. Follow the current instructions. Business timezone, currency and formats; feature switches appear at right.

11 / BUILD THE BUSINESS

Organize your service catalogue

Core appointment workflow

Open: /admin/services/category

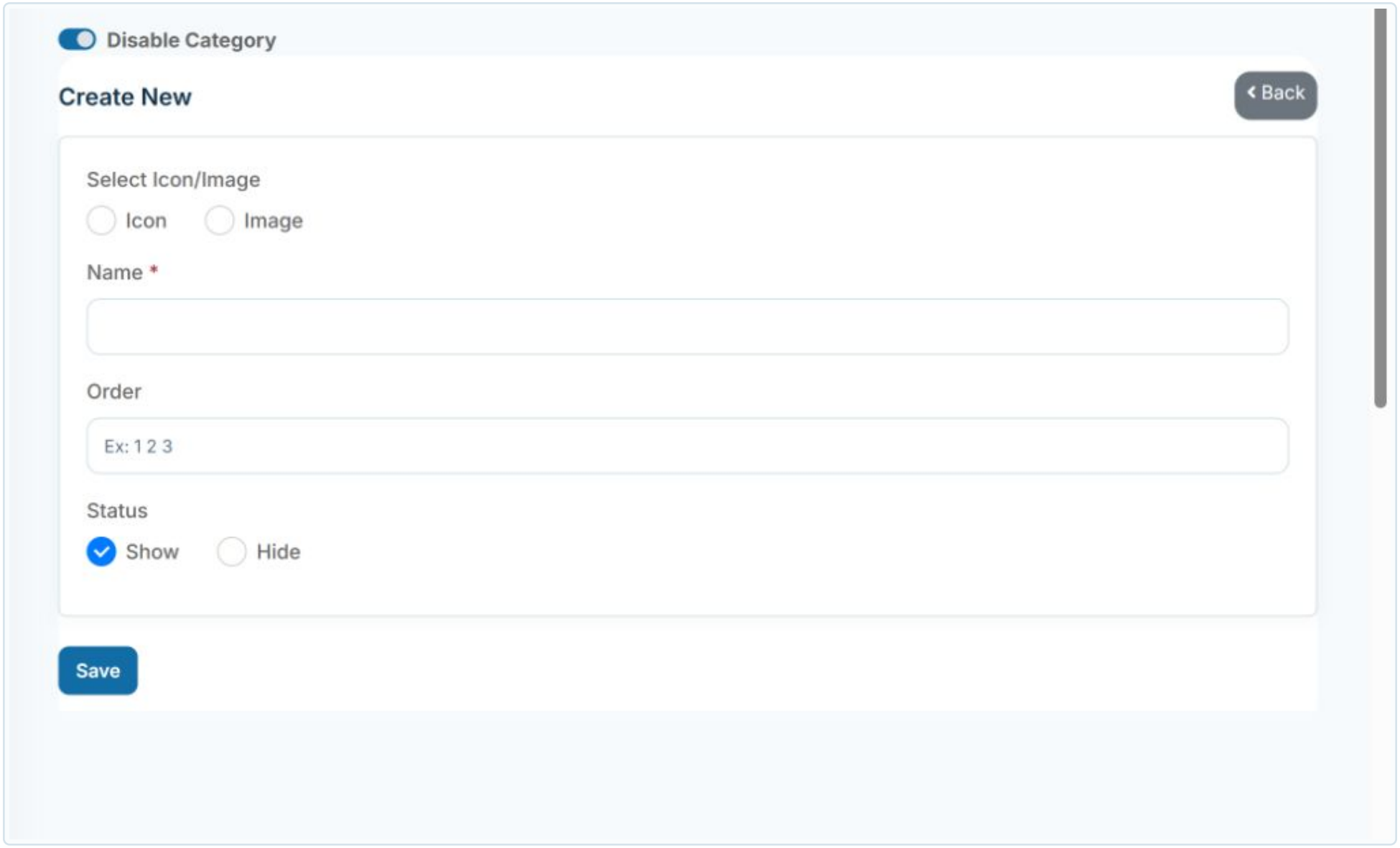
Categories help customers navigate a growing menu. Choose names that describe the service rather than internal staff terminology.

1. Open Services > Category and review existing categories before adding duplicates.
2. Create concise category names such as Consultations, Treatments or Follow-up appointments.
3. Save each category, then assign it when creating or editing a service.
4. Review the service list for clear names, realistic durations, correct prices and active status.
5. Open the public booking page and check the services customers can actually choose.

> **Expected result**
> Related services are organized consistently and the public menu is easier to understand.

Practical tip Use service details for inclusions and preparation instructions. Avoid putting the full policy into a long service title.

Know the limit Your plan can limit services and other records. If the form blocks a new record, check the current package and limit before trying again.



Reference screen; labels may vary. Follow the current instructions. Original category editor: icon/image, name, order and visibility.

12 / BUILD THE BUSINESS

Create a bookable service

Core appointment workflow

Open: /admin/services

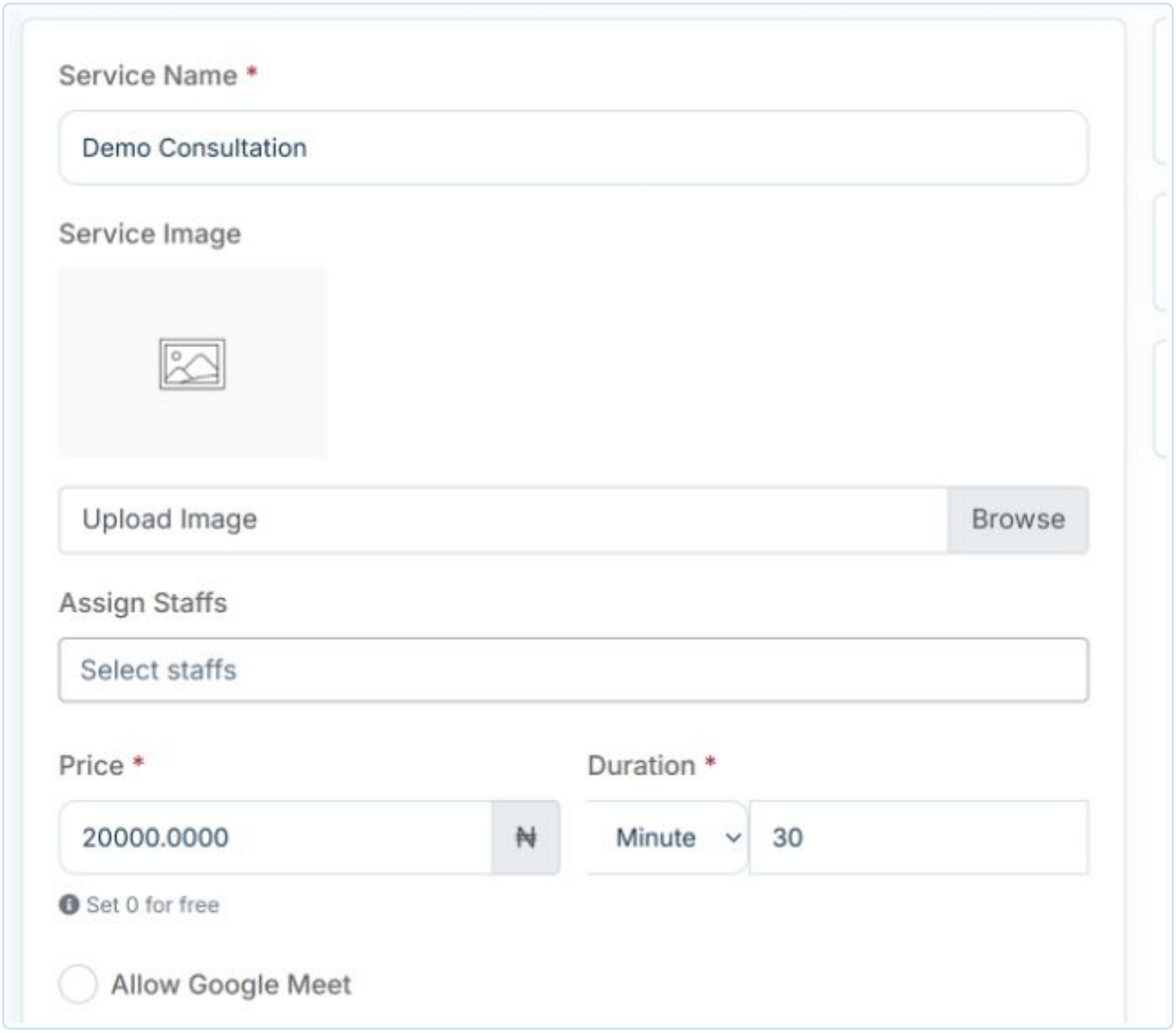
A service needs more than a name and price: customers also need an accurate duration and an available professional who is assigned to deliver it.

1. Create or edit a service. Add its name, category, photo, details and price; zero price represents a free service.
2. Use a one-time service with a duration expressed in minutes or hours for the upgraded appointment journey.
3. Assign the appropriate staff and set the service to active/visible.
4. Review any preparation/recovery buffers. The reserved time must fit the available schedule.
5. Save, reopen the public booking page and check that the service has a suitable professional and available slot.

> **Expected result**
> The service can be selected and scheduled for its complete duration with a valid staff assignment.

Practical tip The upgraded wizard allows up to 12 services in one booking. They run sequentially; their times do not overlap automatically.

Know the limit The native editor also offers extras, recurring/day settings and older service deposits. Those fields do not establish upgraded-wizard compatibility. Configure upgraded booking deposits in Website & booking rules.



Reference screen; labels may vary. Follow the current instructions. Service editor: generic name, image, staff assignment, price and duration.

13 / BUILD THE BUSINESS

Add staff and assign services

Core appointment workflow

Open: /admin/staff

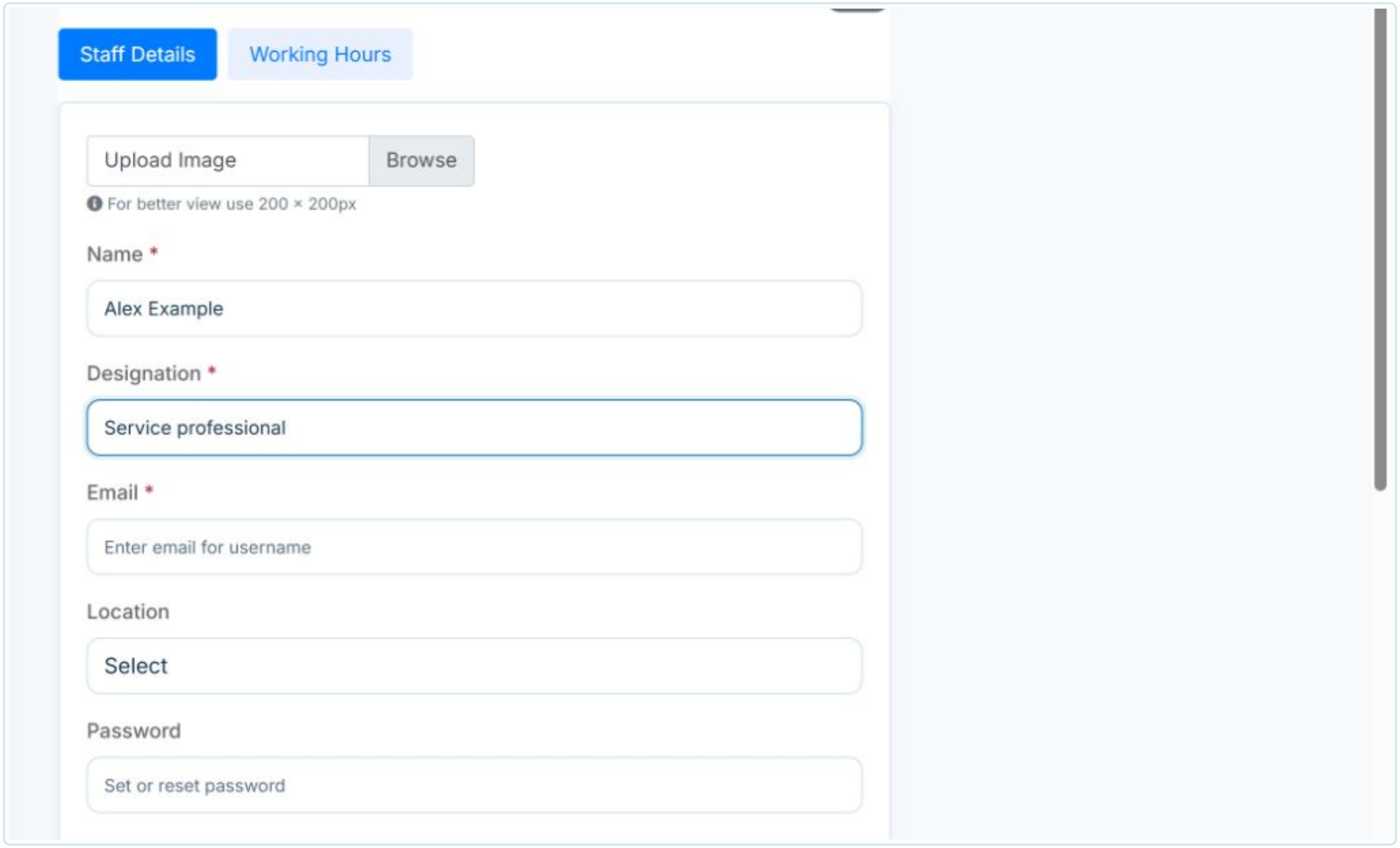
Staff records connect services with the people who perform them. A business with one professional should assign that person consistently to every relevant service.

1. Create a staff record with name, photo, designation, email, phone/country code and relevant details.
2. Choose the active/visible status and applicable location/branch assignments.
3. If staff login is needed and offered, set a unique password directly in the secure account form. The email acts as the username.
4. Open each service and assign the staff member who can provide it.
5. Complete the staff working hours, save, then confirm that the person appears for a compatible service on the public booking page.

> **Expected result**
> Bookly can match the selected service to an eligible professional with working availability.

Practical tip A scheduling record does not automatically grant a working staff login. Confirm access separately if staff need to sign in.

Know the limit This is a scheduling module, not a general team-permissions or invitation builder. Do not assume staff can manage every owner setting.



Reference screen; labels may vary. Follow the current instructions. Staff details: a generic name/designation, email, location and optional password.

14 / BUILD THE BUSINESS

Set staff working hours and breaks

Core appointment workflow

Open: /admin/staff

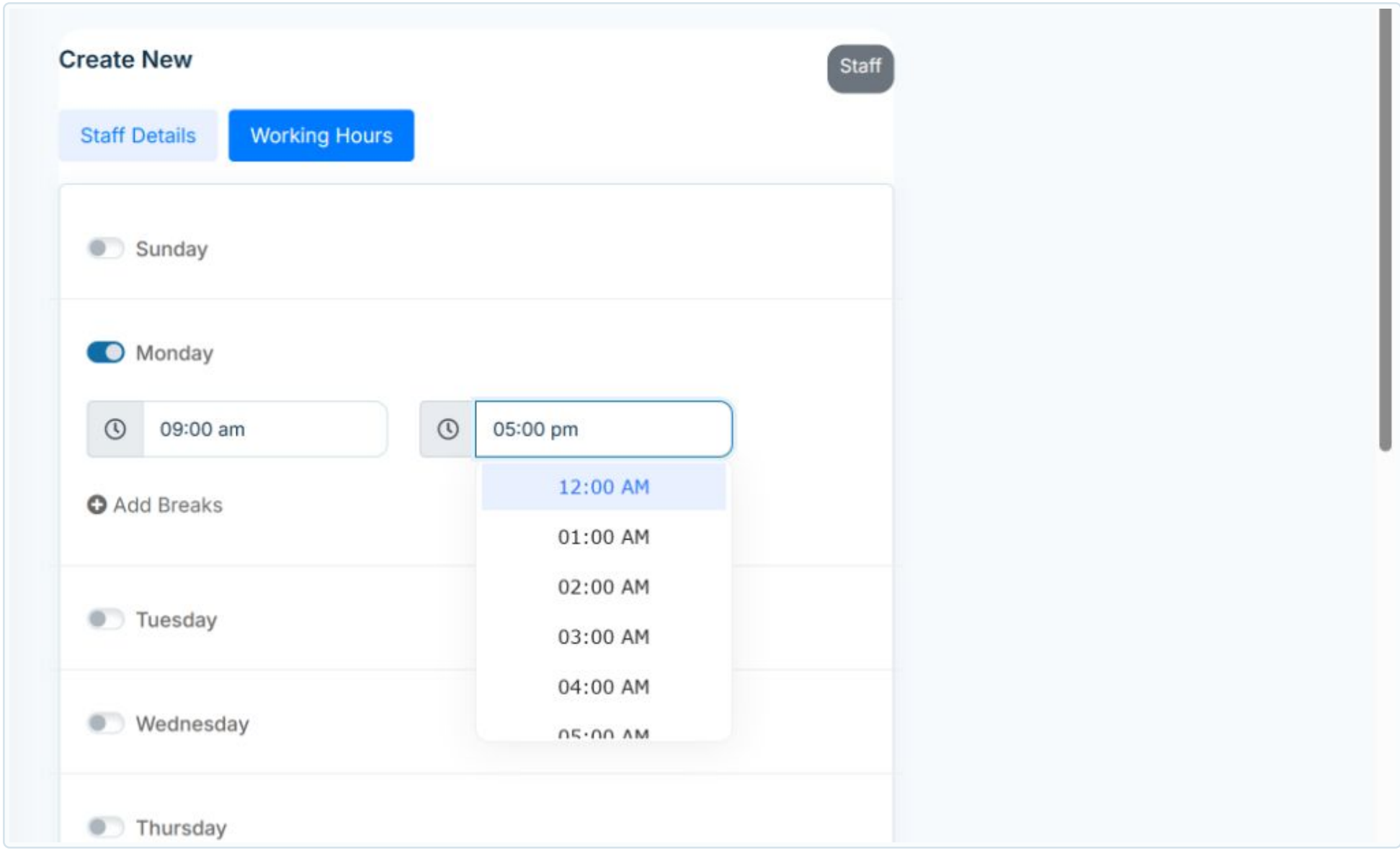
Use the staff record's Working hours tab to describe when that professional can accept appointments. Business hours and staff hours must work together.

1. Open the staff member and switch from Details to Working hours.
2. Mark the days they work and enter opening and closing times for each day.
3. Add start/end breaks for lunch or routine unavailability.
4. Save and compare the schedule with the business's own working hours and location assignments.
5. Test a service of realistic duration near a break and near closing time. Confirm the whole service and buffer can fit.

> **Expected result**
> Only suitable staff time is offered alongside the other availability checks.

Practical tip A 90-minute service cannot start 30 minutes before closing. Longer multi-service selections need a continuous valid sequence.

Know the limit Existing appointments, active holds, holidays, service buffers, locations and business hours can remove a slot even when the staff member's own hours look open.



Reference screen; labels may vary. Follow the current instructions. Staff Working Hours tab: open days, time selector and break controls.

15 / BUILD THE BUSINESS

Maintain opening hours and holiday closures

Core appointment workflow

Open: /admin/settings/working_hours

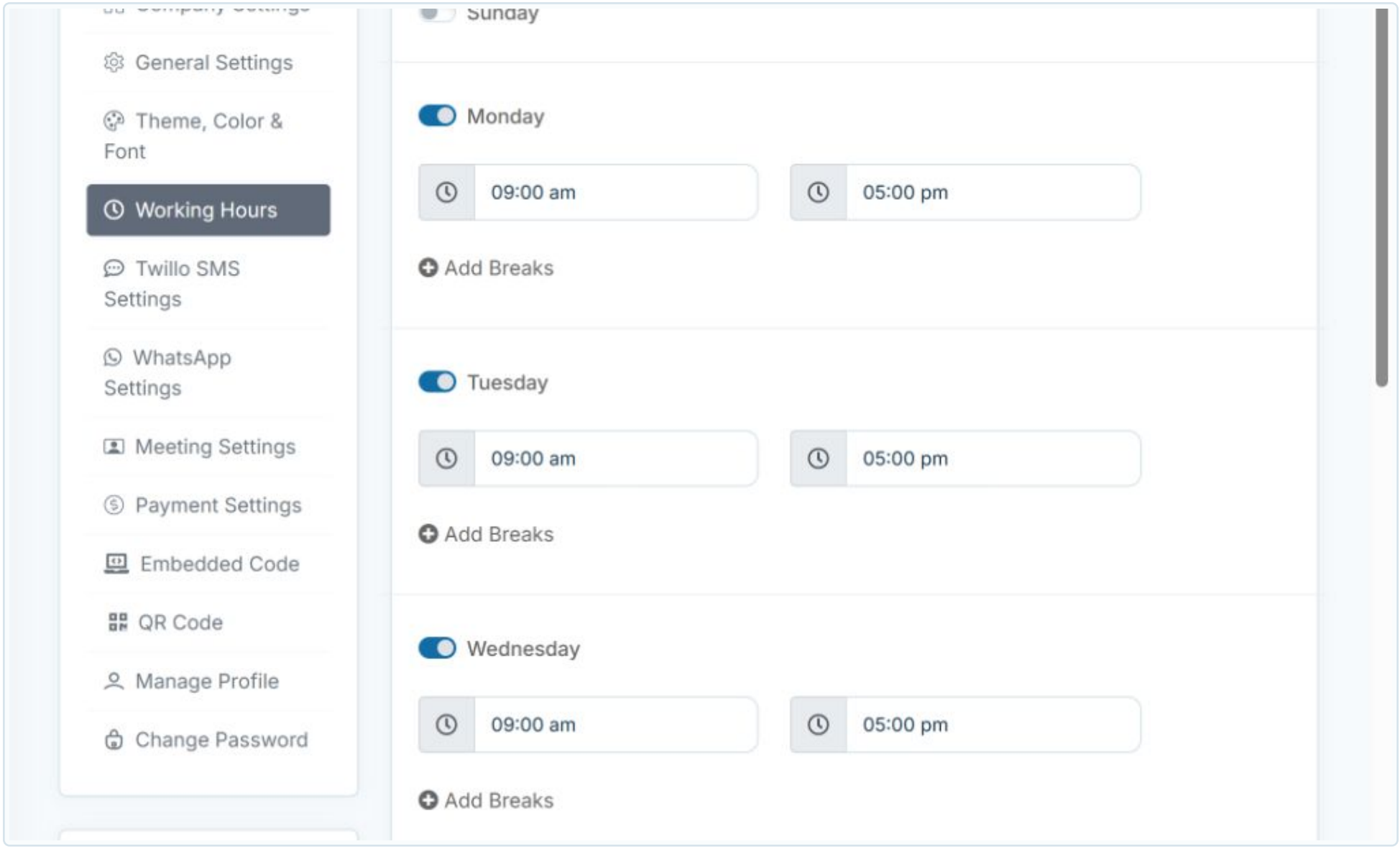
Use regular hours for repeating availability and the Holidays calendar for whole-day closures. Keep the displayed business timezone in mind.

1. Open Settings > Working hours. Mark each day open or closed and enter the start/end times.
2. Add routine breaks, save, then review the staff hours for the same days.
3. Open Settings > Holidays to block specific closure dates.
4. Select a holiday date carefully: selecting an already blocked date toggles it off.
5. Check the public calendar on an ordinary working day and on the closure date before sharing availability.

> **Expected result**
> Customers can book within the business's real opening schedule and cannot select blocked holiday dates.

Practical tip Use breaks for a shorter recurring closure and holidays for a whole day. Review holidays before seasonal closures.

Know the limit Changing future availability does not by itself contact or move customers who already have appointments. Review affected bookings and communicate any changes.



Reference screen; labels may vary. Follow the current instructions. Business working hours: open days, opening/closing times and Add Breaks.

Configure locations and branches

Core appointment workflow

Open: /admin/location

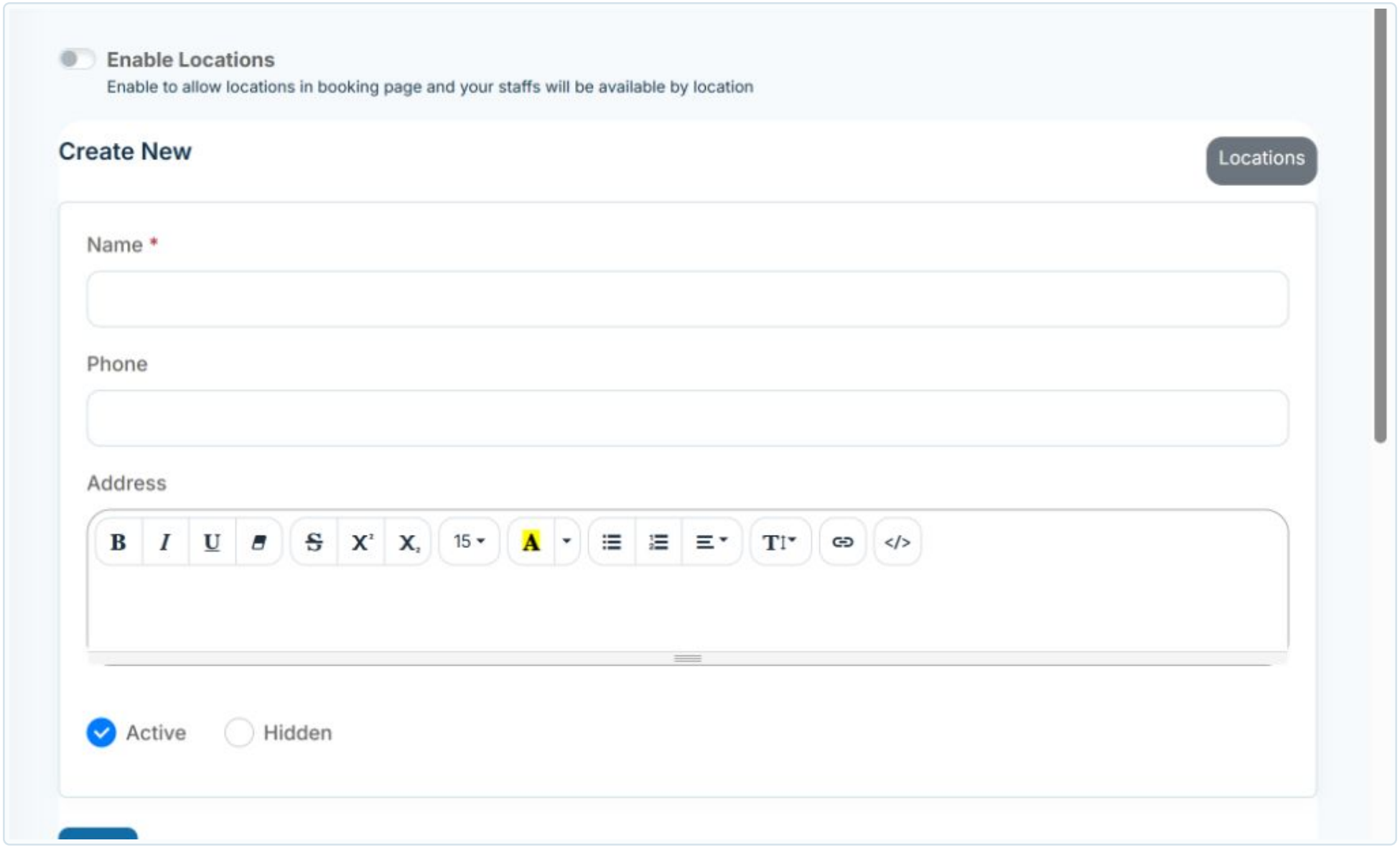
Locations are useful when the business serves customers at more than one place. Only enable them when each service and professional can be mapped accurately.

1. Review the location enable/disable control and enable it when required.
2. Create a main location with its name, phone, address and active status.
3. Add a branch/sub-location under its parent when the business structure needs one.
4. Check staff location assignments and any service/location compatibility controls shown.
5. Save and walk through a public booking for each active location. Check the selected address and available professionals.

> **Expected result**
> The booking uses a valid active location and offers compatible availability.

Practical tip Use clear customer-facing location names. Put full directions in the supported address/details fields rather than abbreviating the location beyond recognition.

Know the limit When locations are disabled, customers do not choose one. When enabled, the upgraded planner requires a valid location; an incomplete location setup can leave no available slots.



Reference screen; labels may vary. Follow the current instructions. Original location editor: enablement, name, phone, address and status.

17 / DESIGN AND SHARE

Choose your company website design

Core appointment workflow

Open: /admin/business_studio

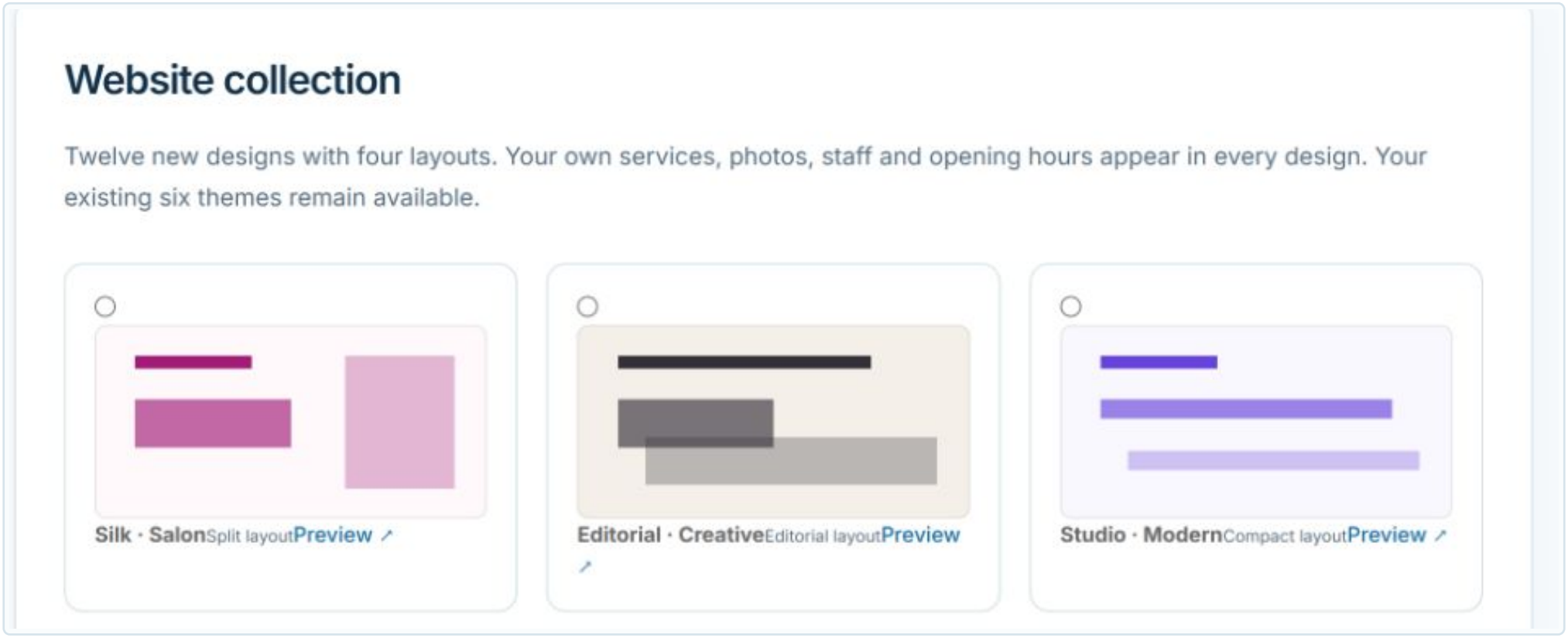
Website & booking rules offers twelve company designs and four layout families. Choose a design that suits your images and service style, then save the choice.

1. Open the website design section and preview suitable designs: Silk, Editorial, Studio, Botanical, Midnight, Rose, Coast, Atelier, Clarity, Counsel, Vivid or Classic.
2. Compare the split, editorial, cover and compact layouts where offered.
3. Select the preferred design and click Save website and booking rules.
4. Open the normal company URL, without a preview query, to verify the saved design.
5. For one of the six original native themes, select Use existing company theme and configure Settings > Appearance/Themes.

> **Expected result**
> The saved public page uses the intended company design and booking action.

Practical tip A preview shows a possibility; it is not evidence the design has been saved. Check the regular public URL after saving.

Know the limit Newer designs display company services, staff, hours and supported media. Original events, products, portfolio, sliders, brands, testimonials and custom pages require a compatible native theme.



Reference screen; labels may vary. Follow the current instructions. Website collection: sample designs, layout families and preview links.

18 / DESIGN AND SHARE

Prepare photographs, gallery and visual assets

Optional original modules; compatible theme and plan required

Open: /admin/gallery

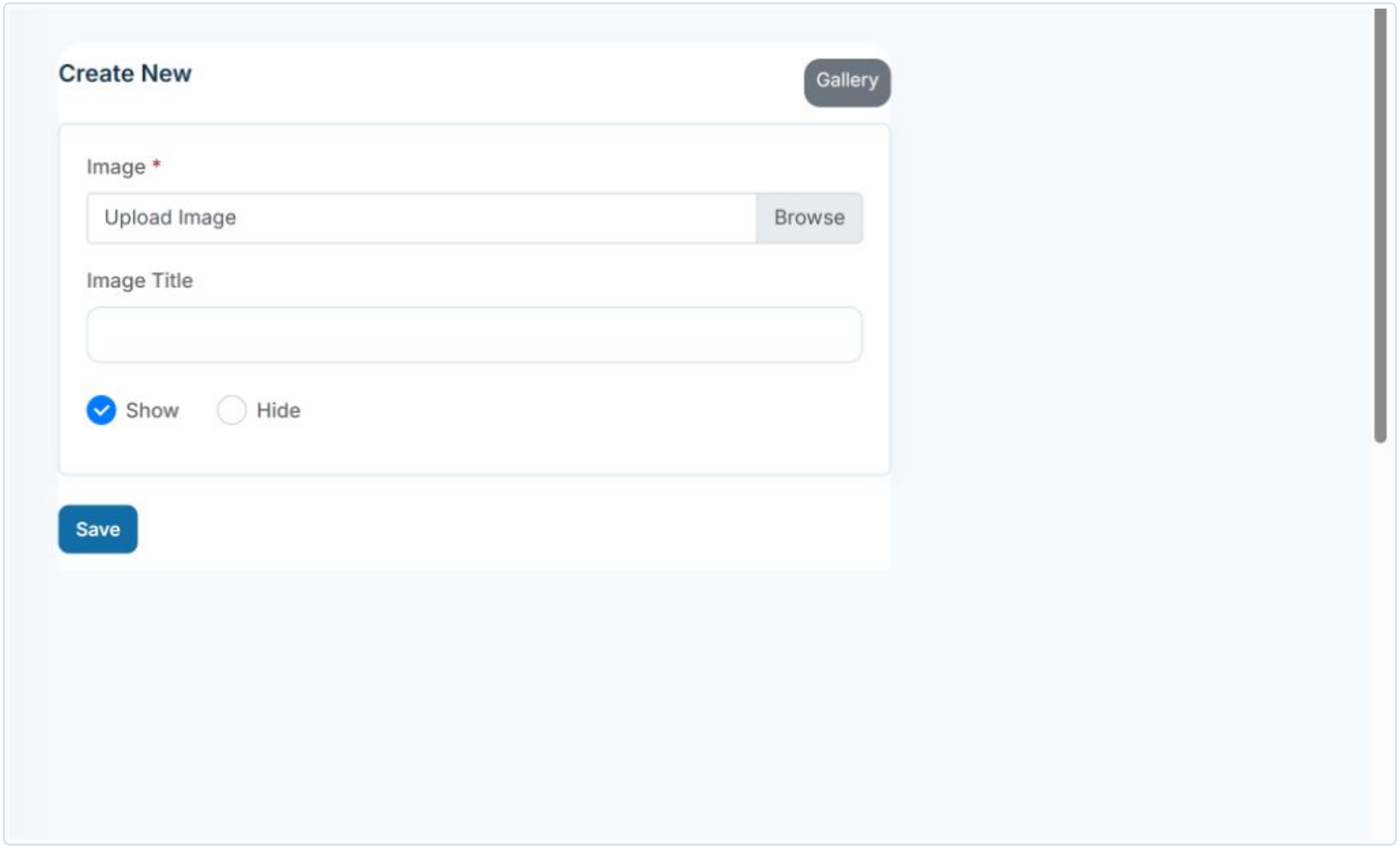
Use clear, licensed images that accurately represent the business. Never use a customer's private payment proof as website content.

1. Choose images the company owns or has permission to publish. Check attribution and licence conditions for any third-party image.
2. For the original Gallery module, upload a photo, add a meaningful title and choose show/hide status.
3. Use Portfolio for a photo, title, category, link and project details where that module is available.
4. Use Brands or Slider for their supported logos, links, images and captions.
5. Save and inspect the actual public design to verify which media sections it renders.

> **Expected result**
> The published website contains relevant, readable images with appropriate permission and no private booking documents.

Practical tip Keep the main subject visible in phone crops. Avoid tiny text embedded in photographs.

Know the limit The newer design's policy gallery and the original Gallery records can be separate. An upload in the native Gallery screen is not a guarantee that it appears in every new design.



Reference screen; labels may vary. Follow the current instructions. Original Gallery editor: image upload, title and show/hide controls.

19 / DESIGN AND SHARE

Preview the public site in light and dark mode

Core appointment workflow

Open: https://bookly.ac/

Review the site as a customer, on a phone and on a wider screen. A good preview checks usability as well as appearance.

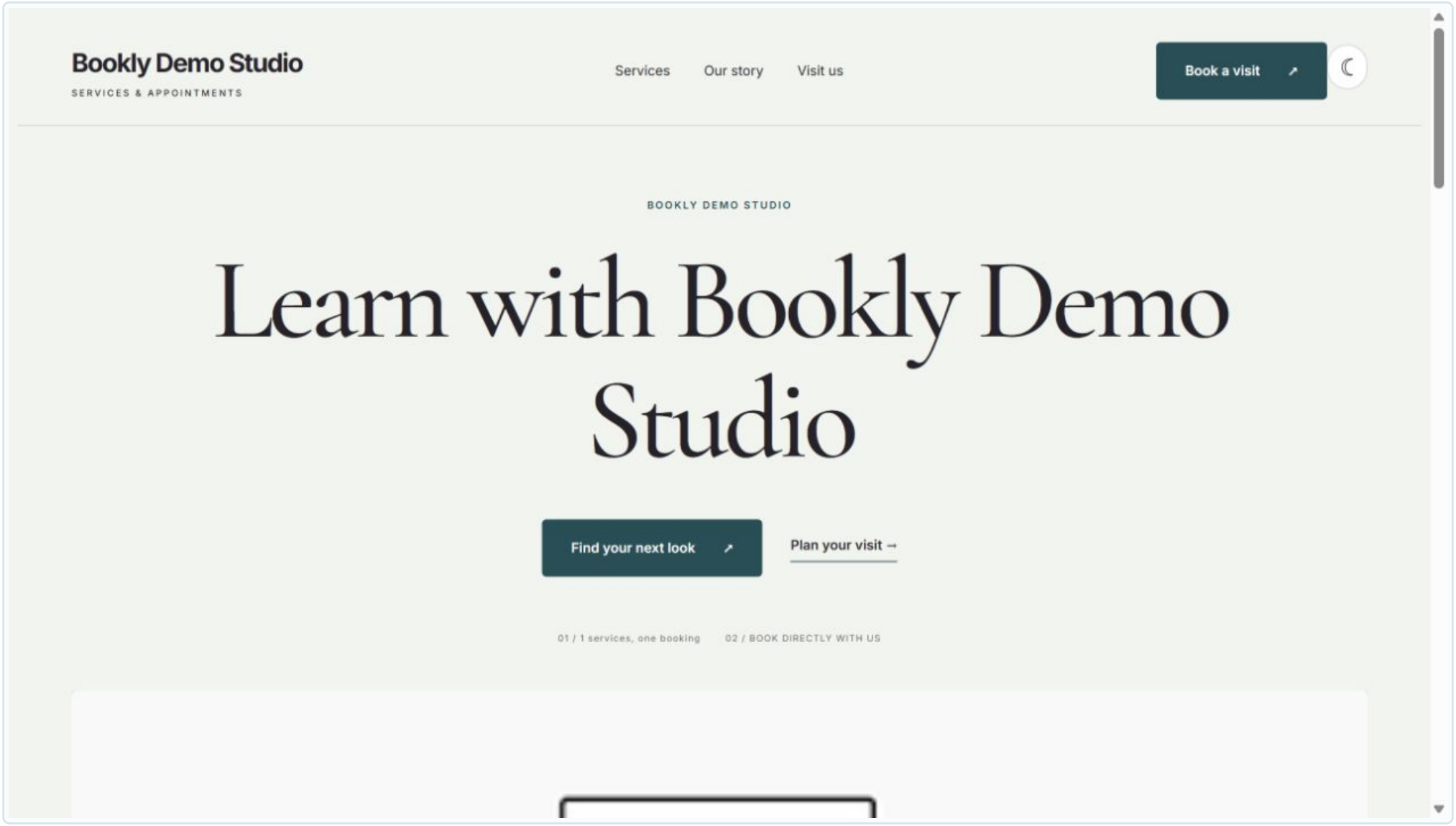
1. Open the regular public company URL and inspect the logo, title, contact information, service menu and booking action.
2. Use the visible appearance switch to compare light and dark modes.
3. Open the navigation menu and check every visible link. Text and controls should remain legible in both modes.
4. Check long service names, image crops, prices, opening hours and social links.
5. Start a booking and confirm that the same business name, currency and policies carry through to checkout.

> **Expected result**
> Customers can read the page, navigate it and begin the intended booking journey on common screen sizes.

Practical tip Appearance preference can be remembered by the browser. Test both modes explicitly rather than assuming the initial view is universal.

Know the limit Bookly's blue/green/navy platform identity is separate from company branding. This guide does not imply that every company has an arbitrary palette editor.

Preview the public site in light and dark mode



Reference screen; labels may vary. Follow the current instructions. The generic Bookly Demo Studio public website with its booking and appearance controls.

20 / DESIGN AND SHARE

Create branded QR banners and share your page

Core appointment workflow

Open: /admin/promotion_studio.html

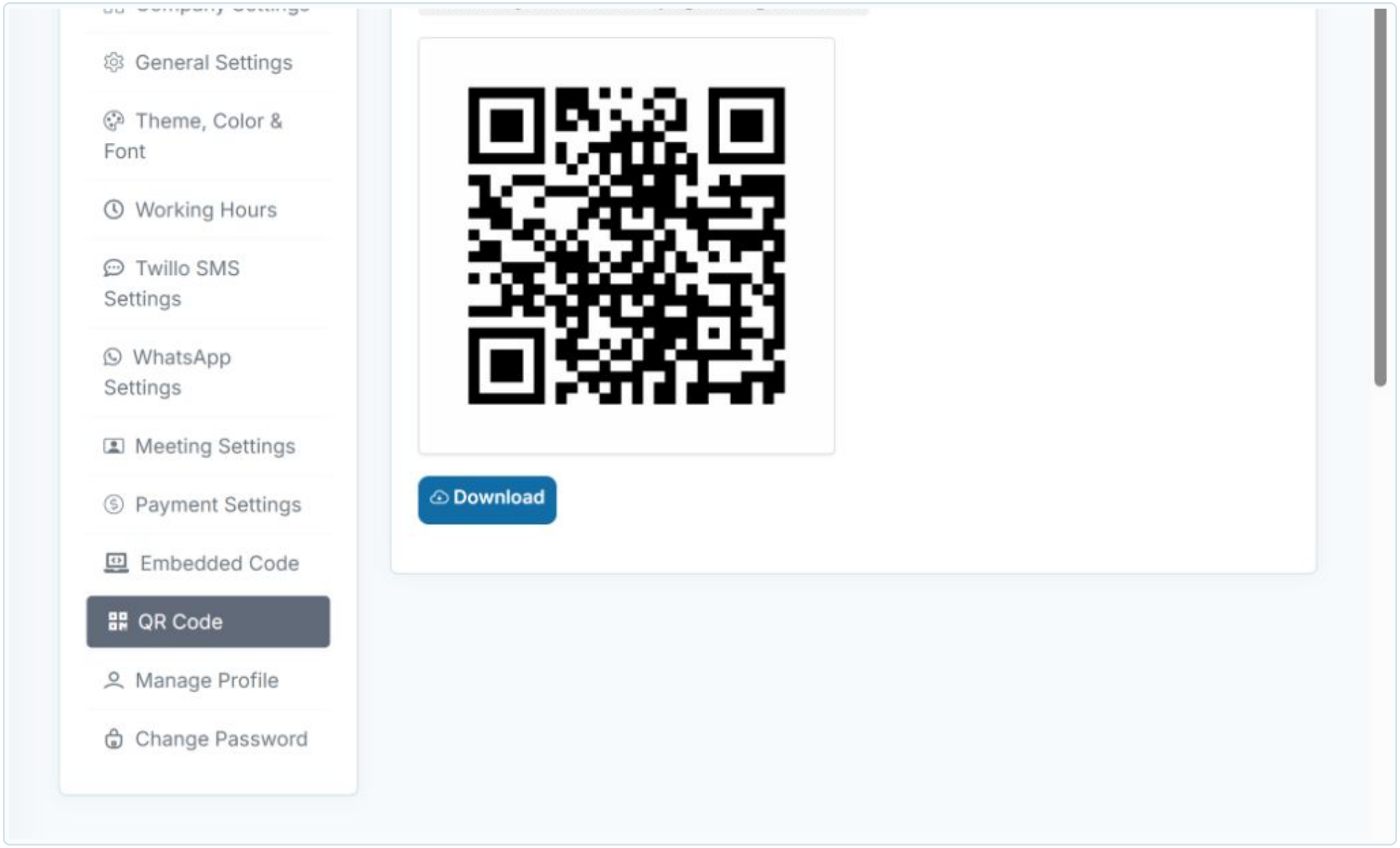
QR codes & banners turns your business logo, booking link and colour into downloadable artwork. Choose square, wide rectangle or standing rectangle.

1. Open QR codes & banners. Check the business and booking URL in the preview.
2. Browse all 21 styles or filter by plan. Free includes Welcome; Starter includes 6, Growth 13 and Scale all 21. Higher plans include lower-plan styles.
3. Choose a size. Paid styles let you edit the headline, short message, call to action and accent colour. These edits do not change your booking page.
4. Download the full-resolution PNG, or use QR PNG / QR SVG for the code alone. Scan the code before sharing or printing.
5. For an external website, use Settings > Embedded code where available and test the supplied embed on that website.

> **Expected result**
> You have a branded, shareable banner that opens the correct public booking page.

Practical tip Free keeps the Welcome layout: logo, the Bookly booking invitation, QR code and Powered by Bookly. Locked styles remain visible with an upgrade prompt.

Know the limit Private Christmas and New Year flyer previews are administrator-only. Eligible paid businesses receive their own seasonal email artwork. Public banners must not contain private receipts or customer information.



Reference screen; labels may vary. Follow the current instructions. QR sharing screen with the generated code and Download action.

21 / DESIGN AND SHARE

Request a custom domain

Optional feature; plan, platform approval and DNS required

Open: /admin/domain

A custom domain requires the platform feature, a qualifying plan, domain ownership, correct DNS and administrator approval.

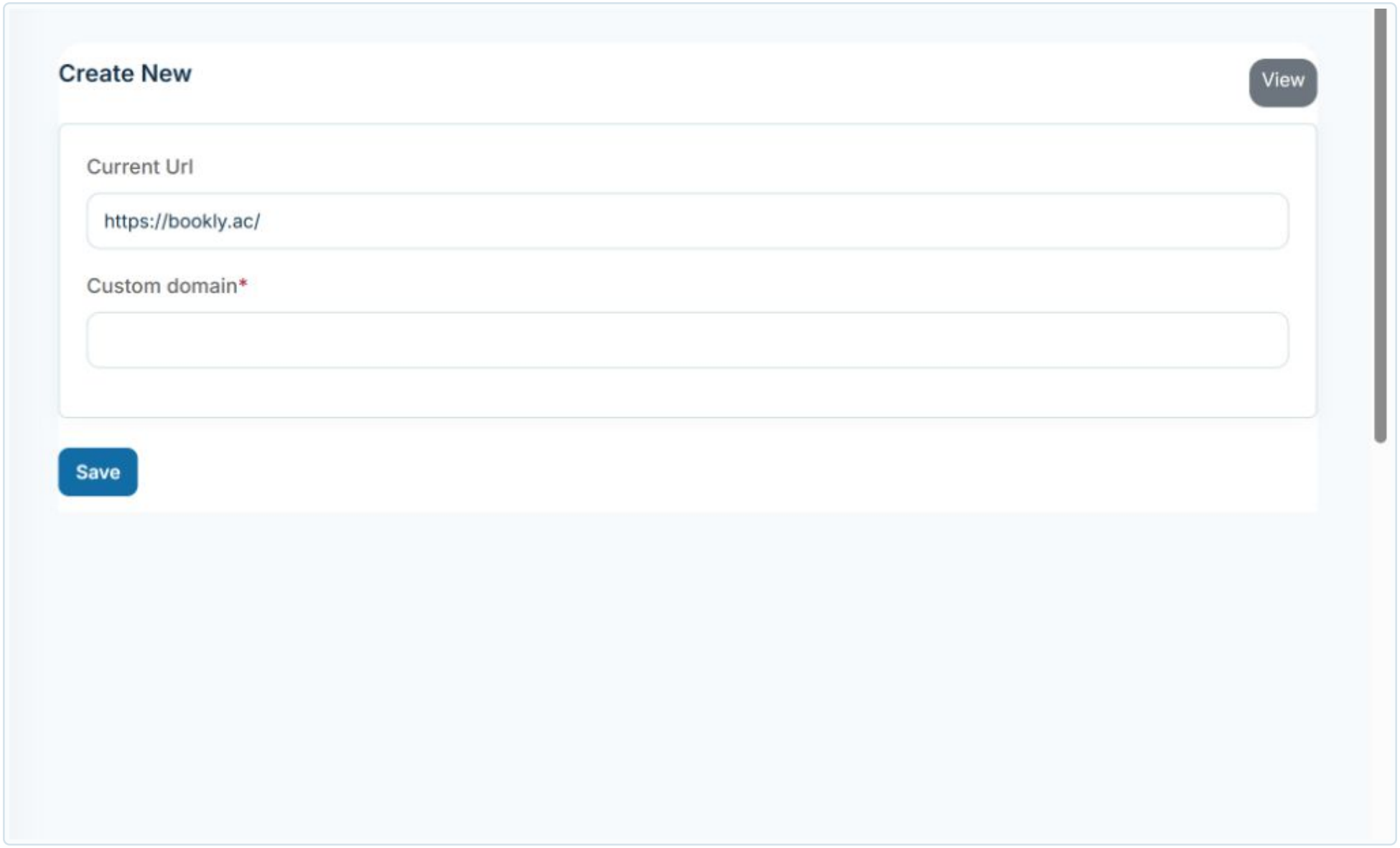
1. Confirm that Custom domain is included and enabled for the account.
2. Enter the domain in the format accepted by the form and submit the request.
3. Open the DNS settings at your domain provider and use the exact Type, Host, Value and TTL instructions displayed in Bookly.
4. Wait for administrator review and DNS propagation. Keep the regular Bookly company URL available meanwhile.
5. After activation, check the secure website, booking action and QR destination on the approved domain.

Expected result
An approved domain resolves to the correct company website after the required DNS and platform configuration.

Practical tip Record your existing DNS settings before changing them. Ask your domain administrator if the displayed record conflicts with an existing service.

Know the limit Do not guess DNS values from another business. Domain registration, immediate activation and bundled SSL are not promised by the presence of this request form.

Request a custom domain



Reference screen; labels may vary. Follow the current instructions. Custom-domain request form; the exact DNS instructions follow the enabled request process.

22 / PAYMENTS WITHOUT CONFUSION

Offer full, deposit or on-site payment

Core appointment workflow

Open: /admin/business_studio

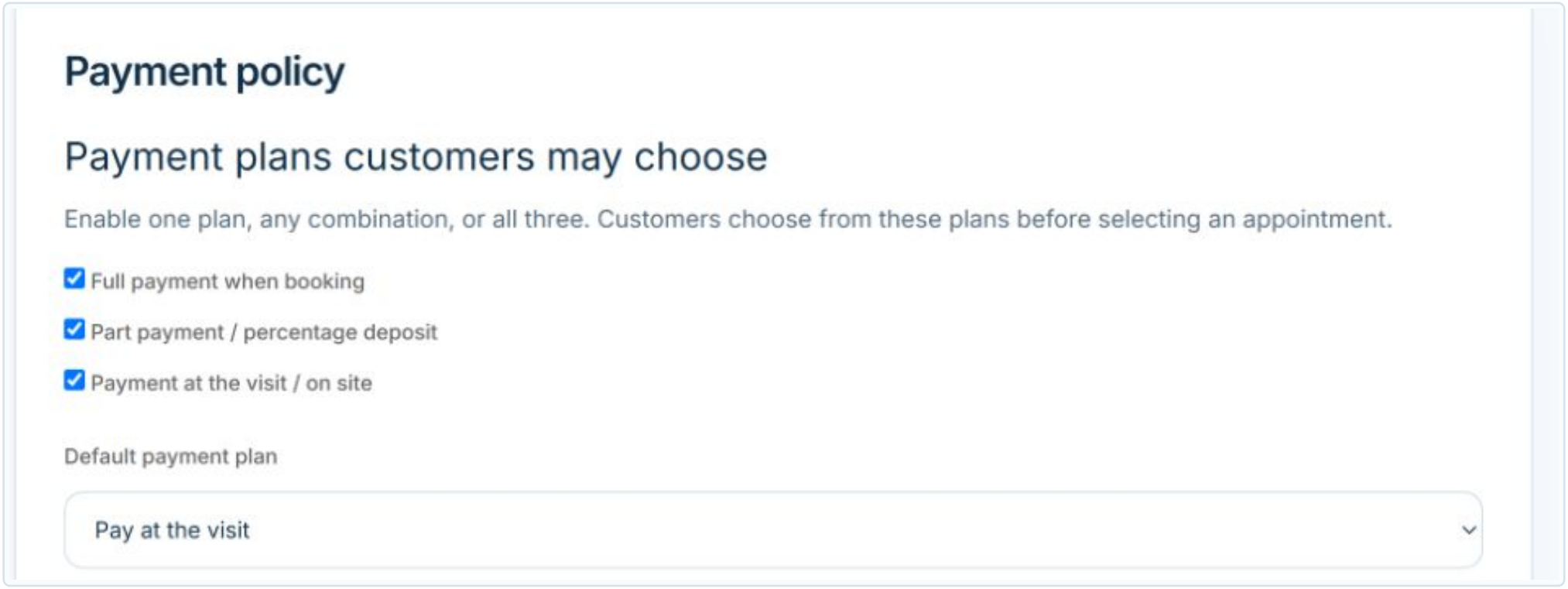
A payment policy decides when money is due. A payment method decides how it is collected. Configure both before enabling advance payment.

1. Under Payment policy, select Full payment when booking, Part payment / percentage deposit, Payment at the visit / on site, or any nonempty combination.
2. Choose a default policy that is also enabled.
3. If offering deposits, enter a percentage from 1 to 99.
4. Configure valid bank-transfer or supported online methods for money due at booking.
5. Save and preview. If multiple policies are enabled, check that the customer can choose and that Review shows the correct total, due now and remaining balance.

Expected result
Customers understand the amount payable during booking and the amount still payable later.

Practical tip For a NGN 20,000 booking with a 25% deposit, NGN 5,000 is due now and NGN 15,000 remains. This is an illustration, not a suggested business price.

Know the limit Part payment requires the deposit feature in the current plan; Free offers full/on-site policies. Payment at the visit is not a free service. Existing bookings retain their agreed policy and amount snapshot.



Reference screen; labels may vary. Follow the current instructions. Business payment-policy choices and default: full payment, percentage deposit or payment at the visit.

23 / PAYMENTS WITHOUT CONFUSION

Choose a currency and review every price

Core appointment workflow

Open: /admin/business_studio

Bookly lets a business choose from the platform's listed currencies. Currency selection labels prices; it does not exchange money or convert the numbers you entered.

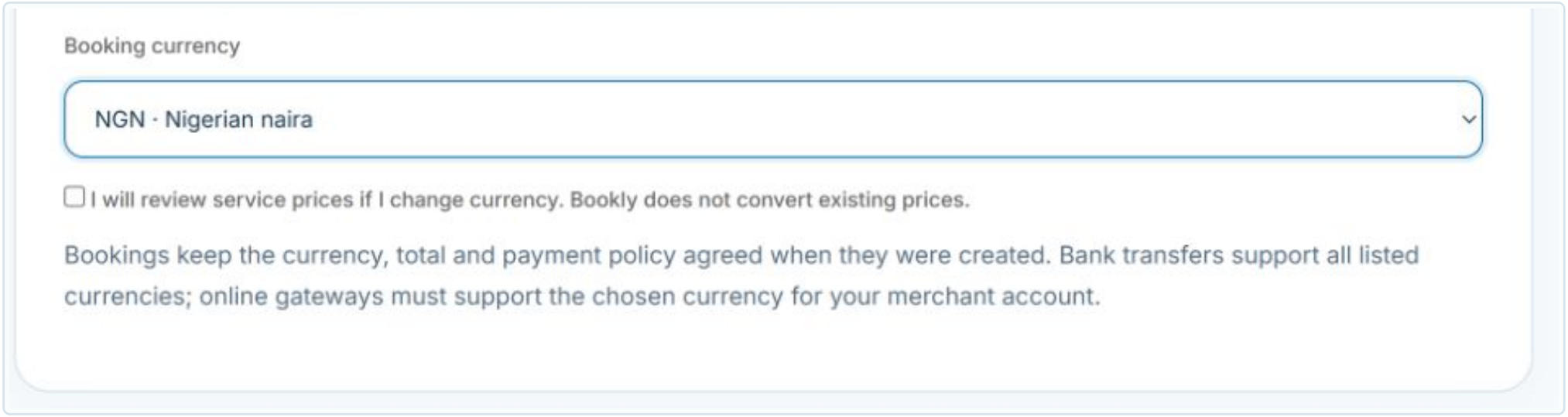
1. Review the current booking currency and choose the required listed currency.
2. Check every service price and any configured tax/fee amounts for the intended denomination.
3. Use the price-review acknowledgement when changing currency, then save.
4. Enable only payment methods that support the currency and the company's actual merchant account.
5. Preview service totals, due-now amounts and remaining balances before sharing the page.

> **Expected result**
> New bookings carry the correct currency and reviewed numeric prices. Earlier upgraded bookings keep their original snapshot.

Practical tip Changing 20,000 from one currency label to another does not calculate an exchange rate. Edit prices deliberately.

Know the limit Businesses receive customer payments through their own accounts. Subscription prices start in USD; country detection and cached reference rates control the displayed subscription currency. Checkout confirms the actual currency, amount and eligible payment method. Crypto uses a separate exact asset/network quote.

Choose a currency and review every price



Reference screen; labels may vary. Follow the current instructions. Booking currency and the explicit acknowledgement to review service prices after a currency change.

Set up bank transfer and proof instructions

Core appointment workflow

Open: /admin/business_studio

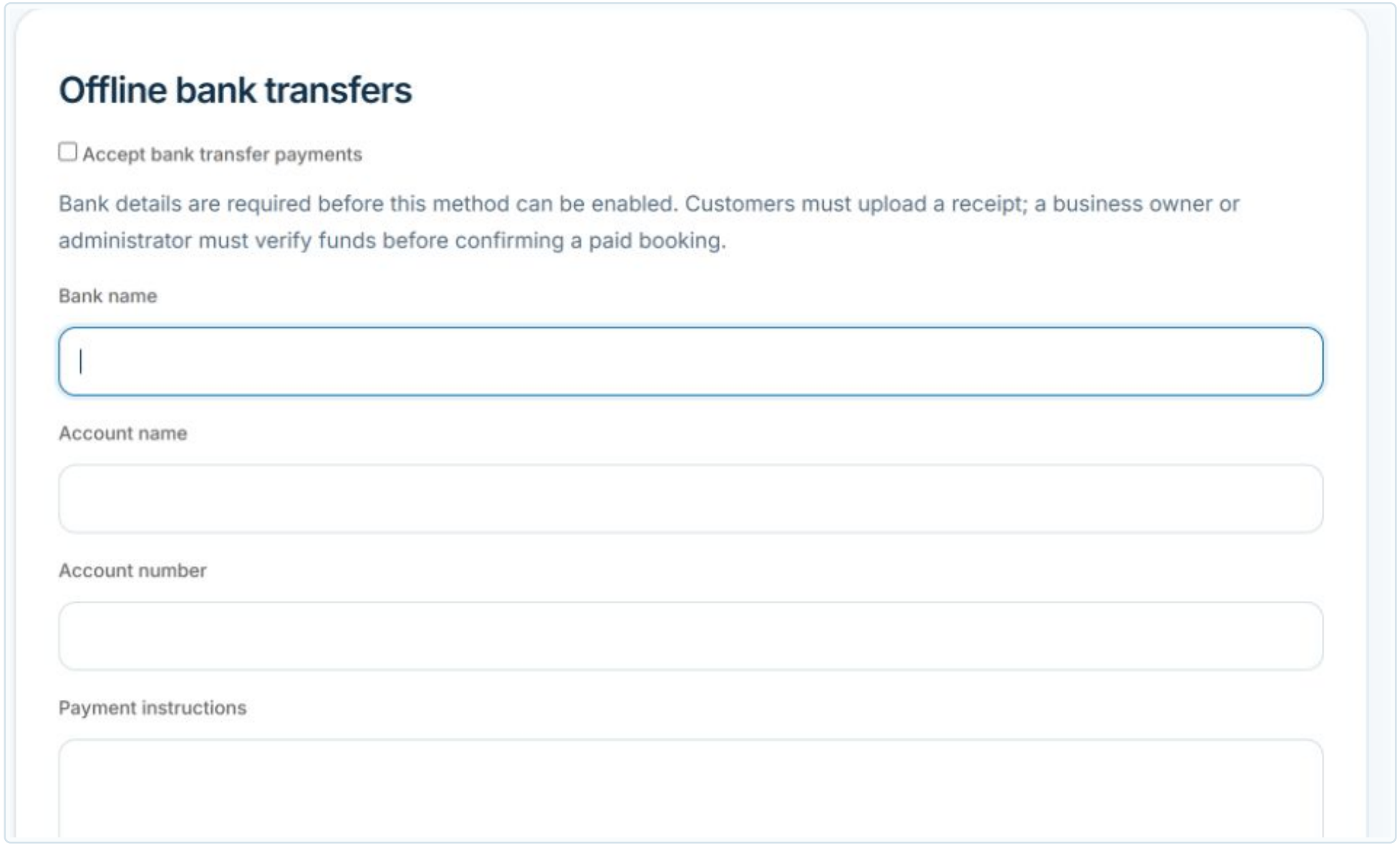
Bank transfer is a manual payment method. Enter the business's actual bank details and make the proof-review requirement explicit.

1. Open Offline bank transfers and enable transfer only after all required bank fields are ready.
2. Enter Bank name, Account name and Account number. Check these against the real business account.
3. Write clear instructions: transfer the amount due now, use the booking reference and upload a readable receipt to the booking.
4. Set the proof-review reservation period between 1 and 72 hours and save.
5. Preview the customer payment screen and verify the bank details, due amount and pending-verification wording.

> **Expected result**
> Customers receive complete payment instructions and know that funds must be verified before an advance-payment booking is confirmed.

Practical tip Suggested wording: Your appointment is confirmed after we verify receipt of funds. Upload only the relevant transfer receipt; do not include card details or unrelated documents.

Know the limit A submitted receipt holds the slot for review within the configured period; it is not automatic confirmation. Late approval rechecks availability.



Reference screen; labels may vary. Follow the current instructions. Offline transfer setup: enablement, bank name, account name/number and payment instructions.

25 / PAYMENTS WITHOUT CONFUSION

Connect a supported online payment account

Payment feature and eligible merchant account required

Open: /admin/payment/user

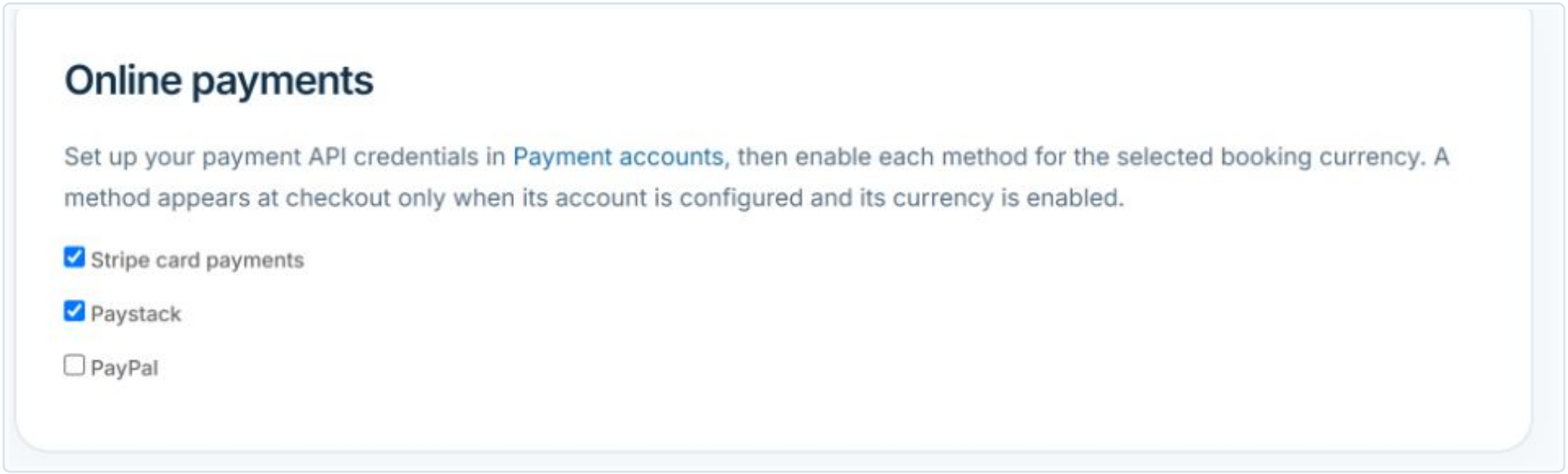
Online payments require the business's own approved merchant account, matching credentials/mode and a supported booking currency.

1. Open owner Payment settings. Enter the merchant details for a supported provider directly in the protected form.
2. Make sure sandbox/test or live mode matches the provider account and credentials.
3. Open Booking payments > Webhook configuration. Register the displayed provider URLs using the correct business UID; ask support if it is not shown. Save Stripe's endpoint signing secret there. Paystack verifies with its configured provider secret key.
4. Save, return to Website & booking rules and enable the intended method for the booking currency.
5. Preview the customer payment choices. An incomplete or unsupported method should not be treated as ready.
6. Follow the provider's test process, then deliberately authorize any live test. Check the resulting verified booking/payment status.

> **Expected result**
> An eligible configured method is available and successful confirmation depends on verified provider payment data.

Practical tip Keep API secrets out of screenshots and public descriptions. Provider onboarding, charges and currency eligibility are separate from Bookly.

Know the limit The upgraded appointment checkout supports Stripe, Paystack and PayPal, plus transfer/pay-later, with private proof review or verified provider results. Subscription payments use their separate verified flow. Other native provider fields do not establish upgraded-checkout support. Older event/product online return routes are blocked; do not launch paid native checkout until a secure replacement is reviewed.



Reference screen; labels may vary. Follow the current instructions. Enable eligible online methods after configuring the merchant accounts.

Booking step 1: services and payment policy

Core appointment workflow

Route pattern: /booking_suite/index/{company-slug}

Customers begin from the company's booking action. The upgraded journey starts with the service selection and any available payment-policy choice.

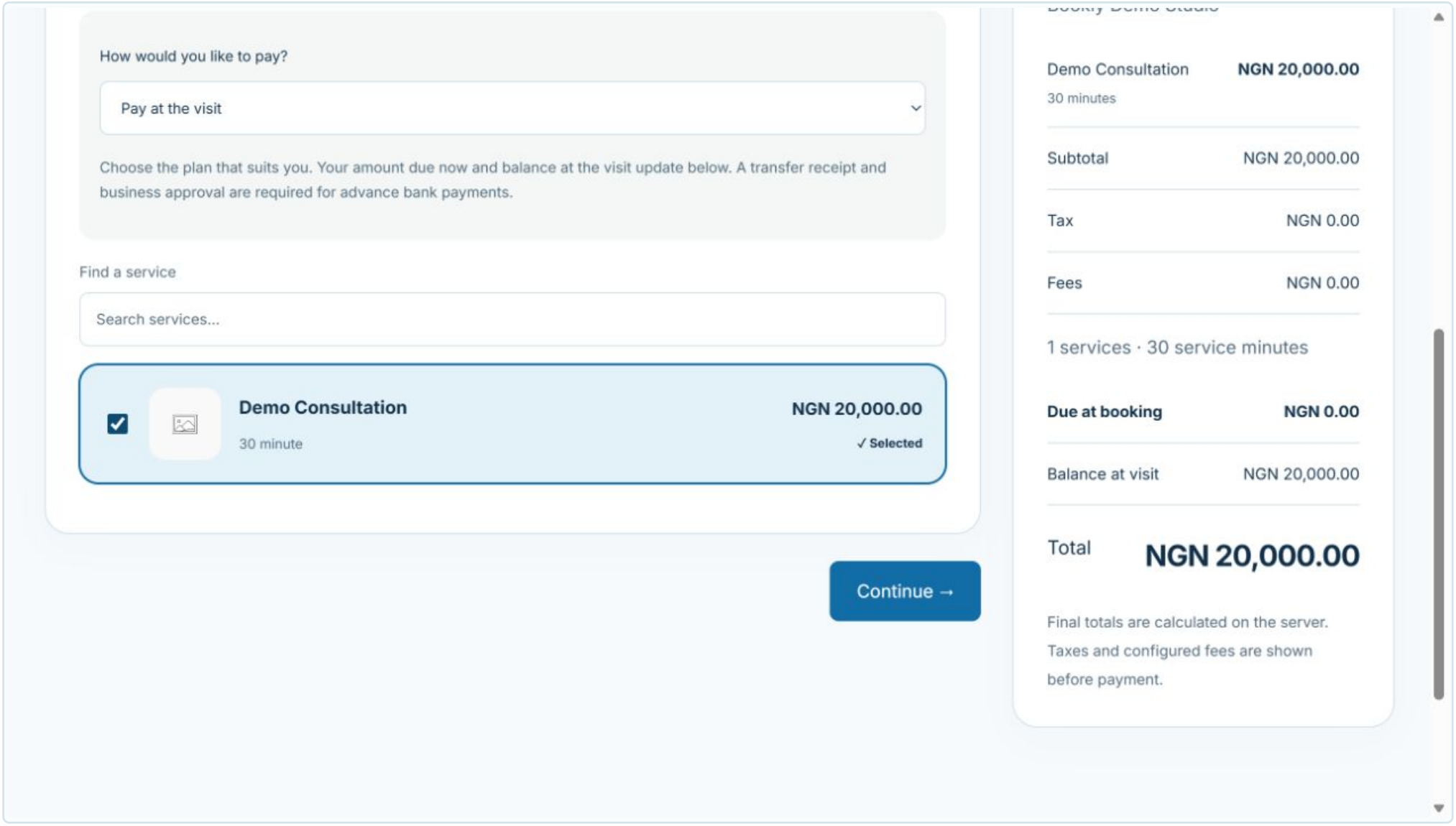
1. Check that the company name and service menu match the business you intend to book.
2. Select one or more eligible services, up to the displayed limit of 12.
3. Review the description, price, duration and currency for each selected service.
4. If the company offers several payment policies, choose full payment, the displayed deposit or payment at the visit.
5. Continue to the Team step. If the selection changes later, review its effect on price, duration and availability.

> **Expected result**
> The booking contains the intended services and an available payment policy before a time is selected.

Practical tip Multiple services form a sequential appointment. Choose the full intended menu before judging whether a particular time is available.

Know the limit This is a demonstration route pattern. Use the actual company slug. Original extras, coupons, custom inputs, group and recurring/day services are not selection options in this upgraded wizard.

Booking step 1: services and payment policy



Reference screen; labels may vary. Follow the current instructions. Example service selection with payment at the visit, due now and remaining balance.

27 / THE CUSTOMER JOURNEY

Booking steps 2-3: team, date and time

Core appointment workflow

Route pattern: /booking_suite/index/{company-slug}

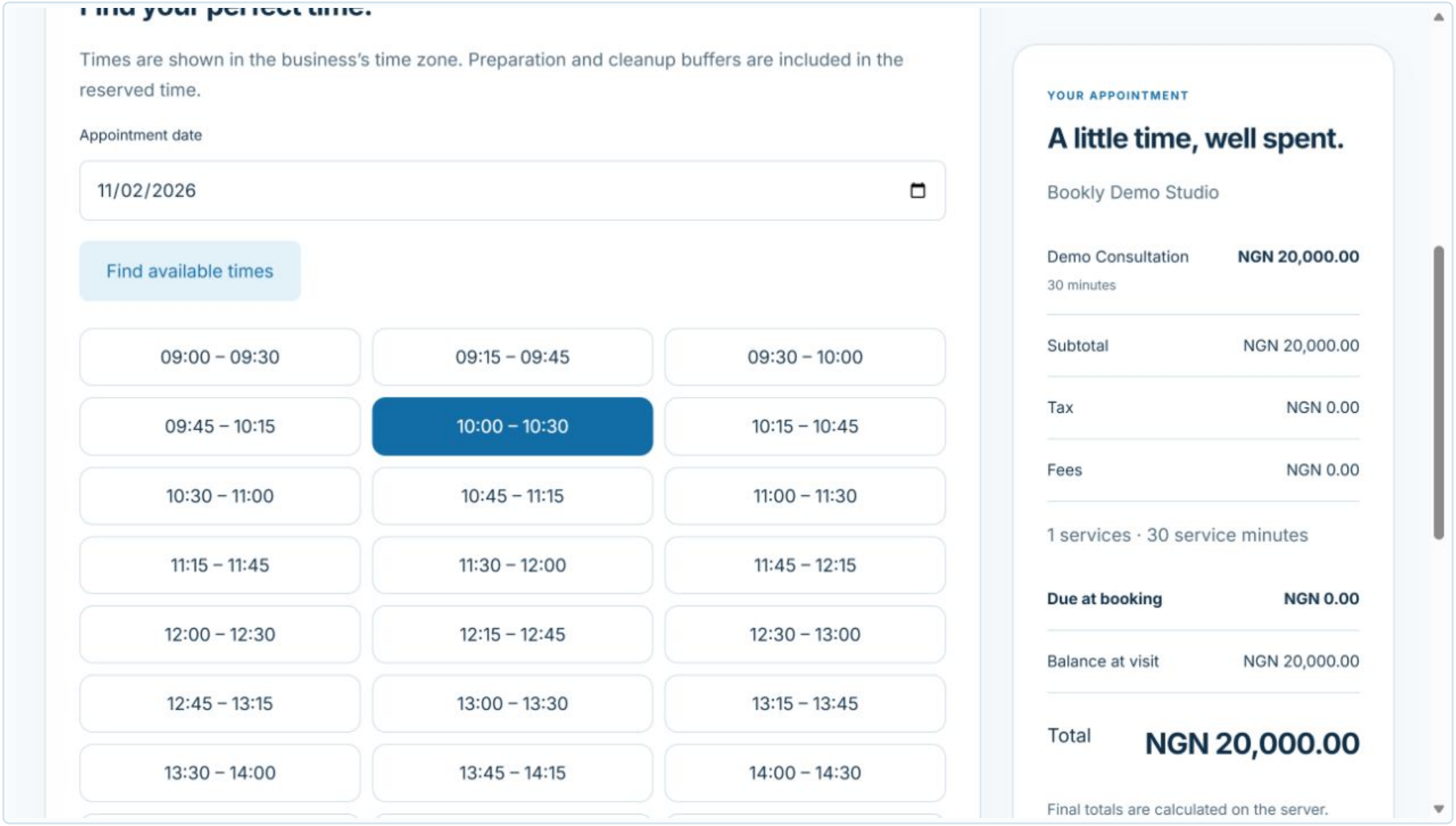
Available time depends on the selected services, eligible staff, opening hours, breaks, holidays, locations and existing bookings/holds.

1. Choose an eligible professional for each service, or use any available professional where offered.
2. Select the required location if locations are enabled.
3. Choose a date and review the available time slots in the business timezone.
4. Select a valid start time and continue. The full sequence must fit the staff and business availability.
5. If no time appears, try another eligible professional or date, or ask the business to check its setup.

> **Expected result**
> The booking has an available staff/time plan for the complete service sequence.

Practical tip Check the business timezone if booking from another region. Your device's local clock may differ.

Know the limit Availability can change while a customer completes the form. Follow any refreshed slot message rather than repeatedly submitting an unavailable time.



Reference screen; labels may vary. Follow the current instructions. Available appointment slots with a sample 10:00-10:30 selection.

28 / THE CUSTOMER JOURNEY

Booking steps 4-5: details, terms and review

Core appointment workflow

Route pattern: /booking_suite/index/{company-slug}

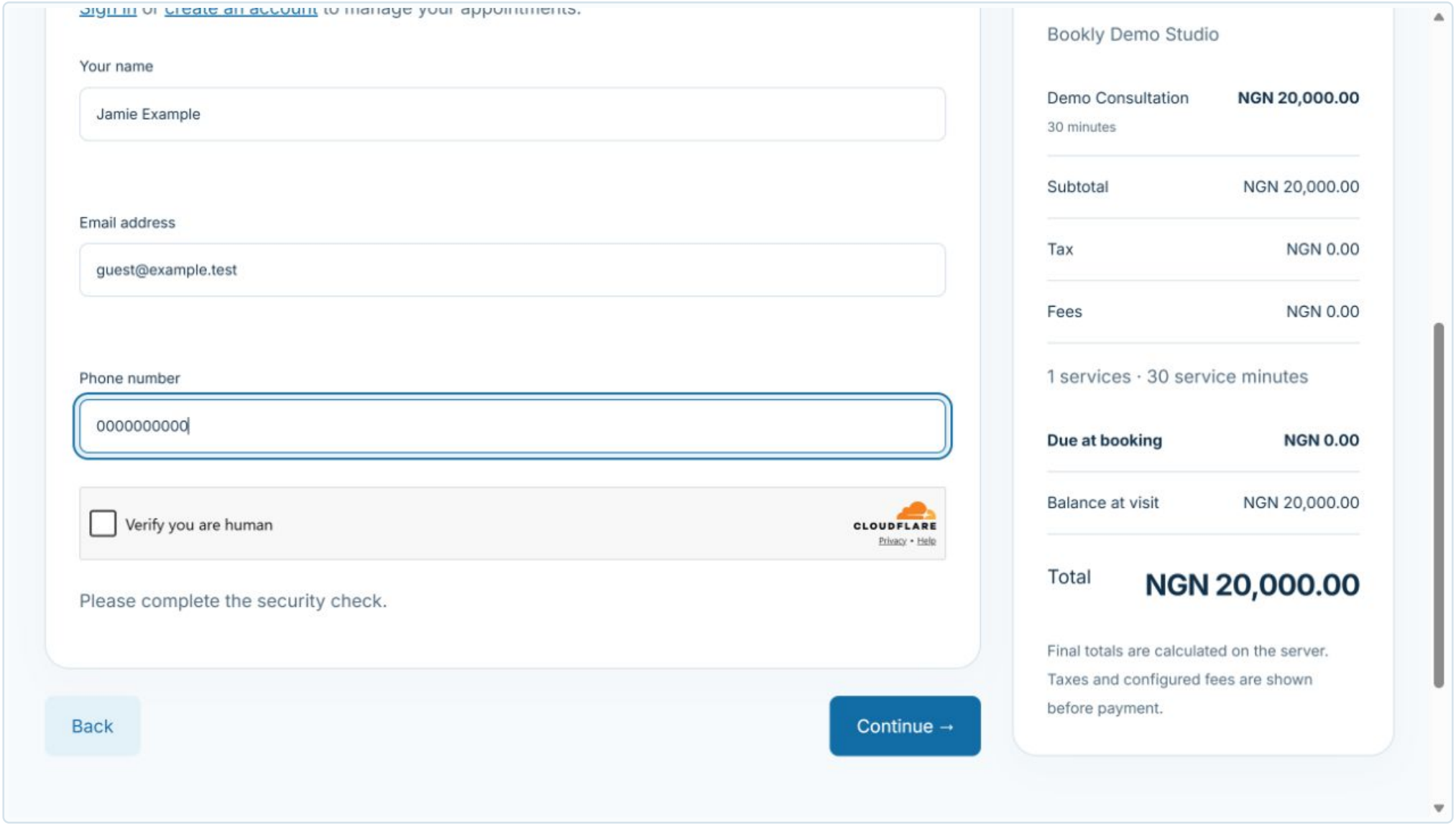
Accurate customer details support status messages and appointment follow-up. The review screen is the last chance to check the agreement before payment.

1. Enter the required guest/customer details, or sign in when offered. Check the email and phone carefully.
2. Complete the displayed human-verification challenge and wait for it to finish.
3. Review the business, services, professional, date and time.
4. Check the currency, booking total, amount due now and remaining balance. Read the linked terms and privacy notice.
5. Tick the required review/terms checkbox deliberately, then continue using the screen's action.

> **Expected result**
> The customer has reviewed the appointment and understands its payment and booking terms.

Practical tip Use an email you can access. A typo can prevent you receiving the booking reference or later status messages.

Know the limit Never bypass the verification check. If it repeatedly fails, report the exact page and error without sending passwords or security codes.



Reference screen; labels may vary. Follow the current instructions. Generic customer details and human verification before the review step.

29 / THE CUSTOMER JOURNEY

Booking steps 6-7: payment, proof and status

Core appointment workflow

Route pattern: /booking_suite/index/{company-slug}

The final action depends on the selected policy. Advance-payment bookings need verified payment; a valid pay-at-visit booking can be confirmed with an outstanding balance.

1. When money is due now, choose an available supported payment method.
2. For transfer, pay the displayed due amount to the displayed business account and use the booking reference.
3. Upload clear proof through the protected receipt control, following its current file-type and size instructions.
4. After receipt upload, the page shows that the business has received the booking for review. Verified online payment confirms an available appointment automatically; a browser return alone is not verified payment.
5. Save the reference and status link. You may open a prepared WhatsApp message and choose to send it to the business yourself.

> **Expected result**
> The customer can track whether payment is awaiting review or the appointment is confirmed.

Practical tip Keep the status link private. Upload only the relevant transfer evidence, not a bank statement or card details.

Know the limit A successful upload or online return page alone is not confirmation of verified funds. Online payment confirmation checks provider amount, currency and reference; transfer approval requires business review.

Verify a transfer proof before confirming

Core appointment workflow

Open: /admin/booking_suite

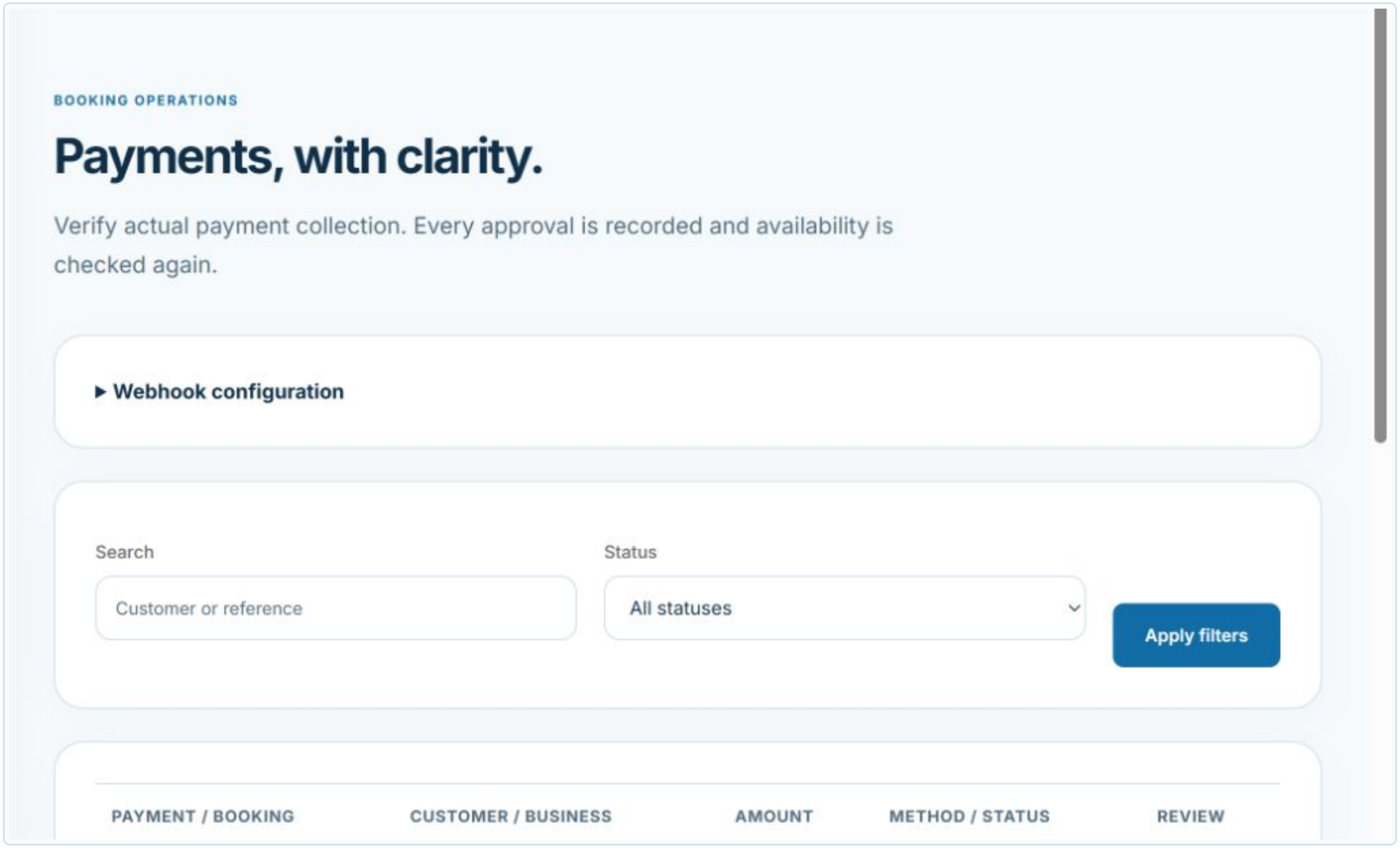
Booking payments is the dedicated review screen for upgraded bookings. A receipt image is evidence to inspect, not proof that the business has received funds.

1. Open the pending booking and check its reference, services, customer, due-now amount and currency.
2. Open the private receipt through the authorized booking screen.
3. Check the actual business bank account for matching funds, amount, currency and reference.
4. Choose Accept / payment confirmed only after checking actual funds and availability. Otherwise use Decline / no payment. Enter your account password to confirm a protected business decision.
5. Check the confirmed status and remaining balance. If review is late, follow any availability/rescheduling message.

> **Expected result**
> Acceptance records the amount required now and confirms the appointment. A deposit still leaves the remaining balance due.

Practical tip Bank-transfer bookings stay pending once receipt upload opens. Review them promptly. An unavailable original slot requires an available replacement; uploading a receipt alone does not confirm funds.

Know the limit Receipts are private and accessed through authorized screens. Do not copy them to the public gallery, email them broadly or approve them just because the image looks plausible.



Reference screen; labels may vary. Follow the current instructions. Booking payments list: search, status filters and an empty demo payment table.

31 / RUN THE DAY

Track status and reschedule safely

Core appointment workflow

Open: /admin/booking_suite

Treat the dedicated upgraded booking detail as the source for its service/payment snapshot and supported actions.

1. Open the booking by its reference. Review services, staff, time, total, payment and balance.
2. A booking without completed payment or proof shows an extra Yes/No warning before changes. No returns to bookings; Yes opens the actions.
3. Use Accept, Decline or Reschedule. Confirmed appointments need no second confirmation.
4. For Reschedule, choose a date, available time and eligible professional. Review the details and enter the requested account verification.
5. Saving confirms the new appointment and queues the customer an email. Rescheduling does not create a payment or remove an unpaid balance.

> **Expected result**
> The booking remains consistent with its agreed prices and valid availability after a change.

Practical tip Changing the company's current price or currency does not rewrite an existing upgraded booking's agreed snapshot.

Know the limit Business owners verify protected changes with their account password. Administrator/support actions retain administrator password and authenticator verification. Availability checks apply to existing and new bookings.



Reference screen; labels may vary. Follow the current instructions. Generic booking detail: confirmed pay-at-visit appointment, remaining balance, service snapshot and rescheduling action.

Handle cancellation, balances and refunds

Core appointment workflow

Open: /admin/booking_suite

Cancellation changes the appointment; refunding changes money held by the business or provider. Keep those actions and records consistent.

1. Open the booking and read its current status, payment snapshot and applicable cancellation deadline.
2. Use the supported cancellation action and give the customer a clear explanation of the resulting status.
3. If money must be returned, carry out the actual refund through the bank/provider using the business's policy.
4. Keep the actual refund reference in your business records and tell the customer what was returned. A Bookly status change does not send a refund.
5. For a completed deposit booking, collect and reconcile the remaining balance according to the agreed policy.

> **Expected result**
> Appointment status and money records describe what actually happened, including any outstanding balance.

Practical tip Keep a consistent internal reference between the Bookly booking and the bank/provider refund.

Know the limit Businesses handle their own customer payments and refunds. Bookly subscription billing is separate; contact contact@bookly.ac for subscription issues. Never delete a paid record as a substitute for refunding it.

33 / RUN THE DAY

Use appointment lists and manual creation

Appointments entitlement required

Open: /admin/appointment?type=all

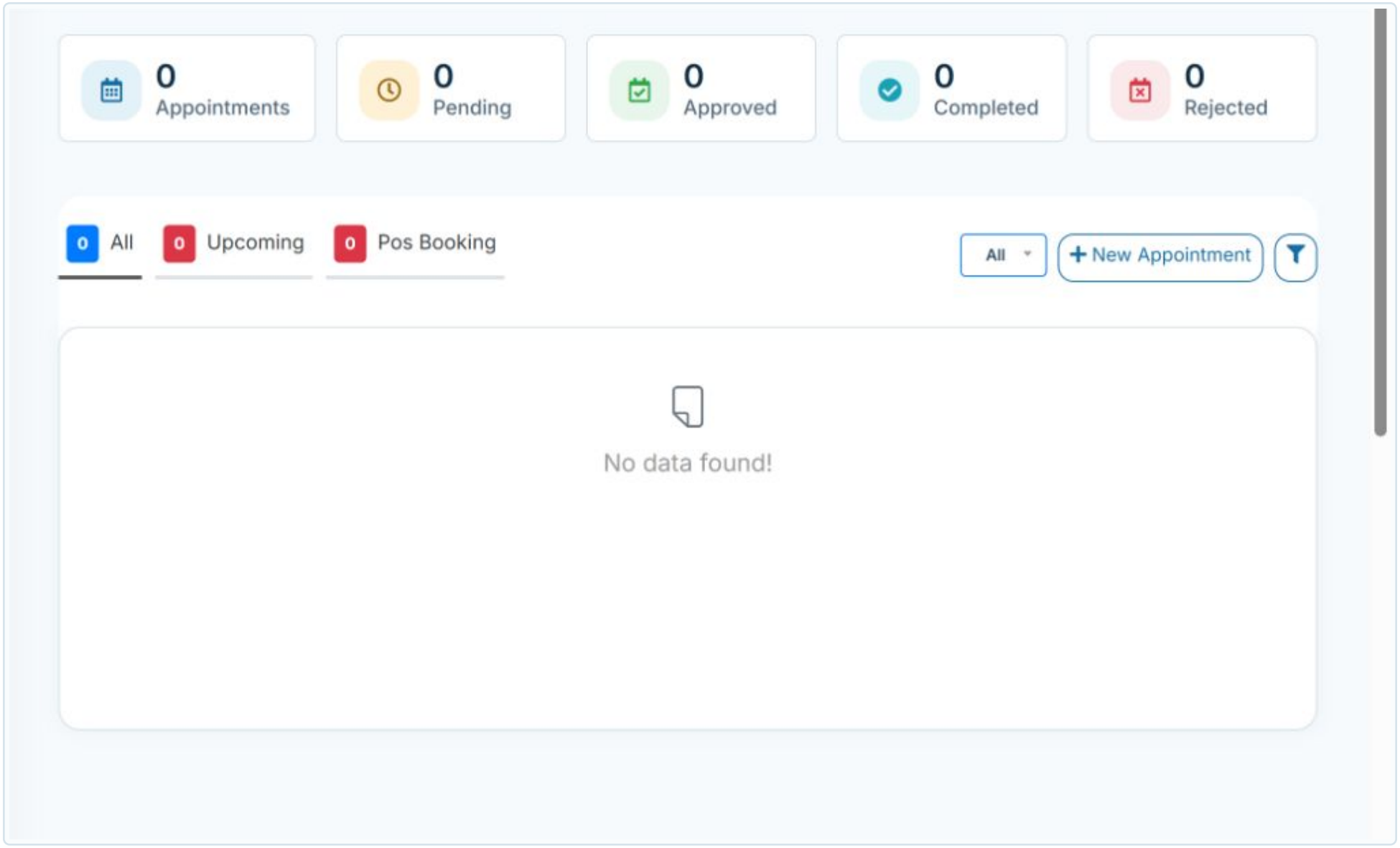
The original Appointments module provides operational lists and manual appointment entry. Use dedicated Booking payments actions for upgraded payment-sensitive changes.

1. Choose the relevant filter: all, upcoming, POS, today, tomorrow, next 7 or next 15 days where shown.
2. Use service, customer and staff search controls to narrow the list.
3. Open an appointment to inspect its details, status and available actions such as payment, reminder or meeting access.
4. For an original manual appointment, select the location/branch, service/extras, staff, customer, date/time, status and notes.
5. Use the optional customer-notification checkbox deliberately, save and check the resulting appointment.

> **Expected result**
> The operator can review native appointments and create a deliberate manual record with the correct person and time.

Practical tip Native statuses include pending, approved, completed and rejected. Read the actual record rather than assuming labels mean the same across modules.

Know the limit Manual/POS creation is a separate original workflow. Do not assume it applies every upgraded multi-service, deposit or transfer-proof safeguard.



Reference screen; labels may vary. Follow the current instructions. Original appointment list: summary counts, list filters and New Appointment.

34 / RUN THE DAY

Use the calendar and online meeting tools

Appointment module; external integrations require configuration

Open: /admin/appointment/calendars

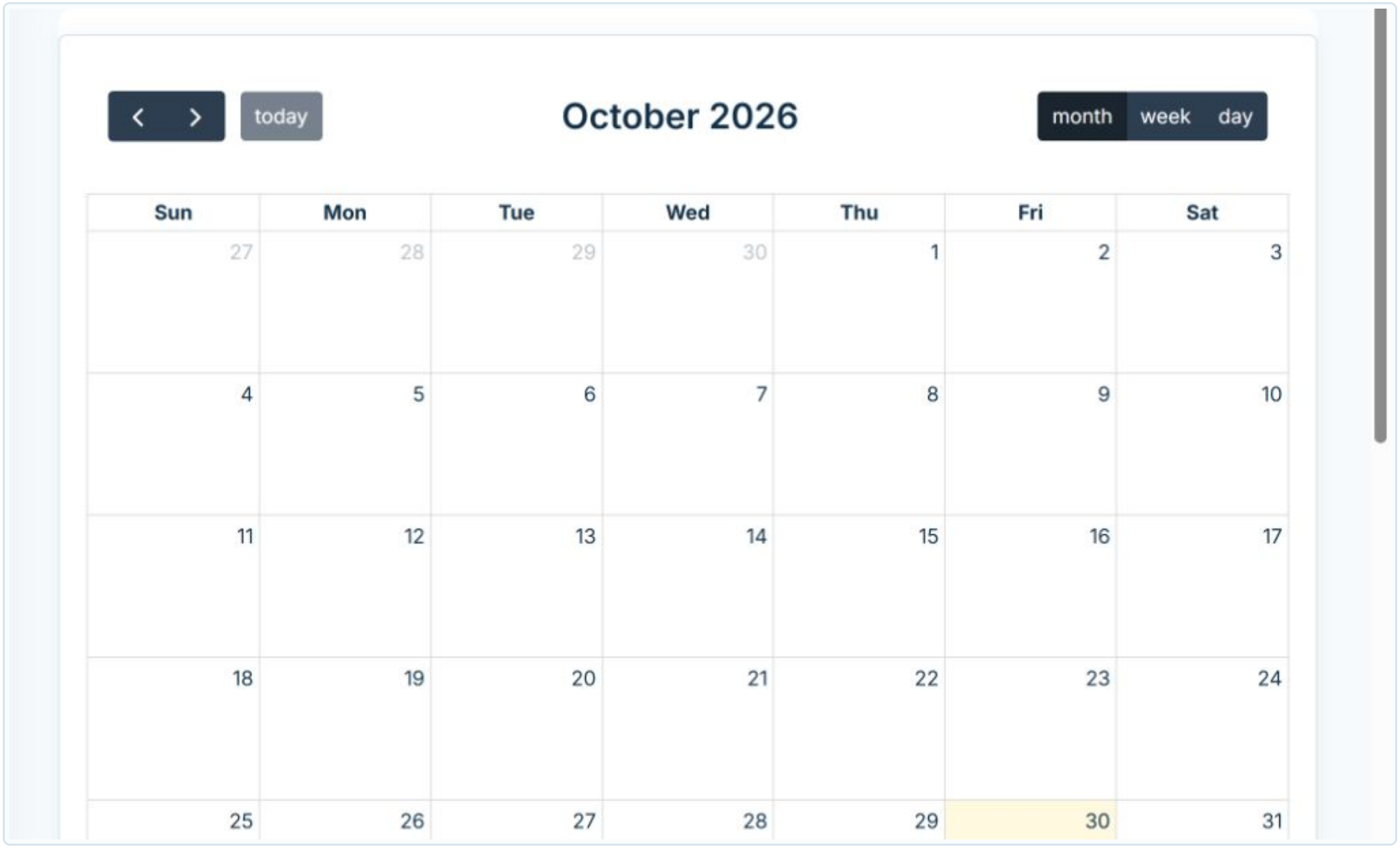
The calendar helps review scheduled appointments. External calendar and meeting services require their own accounts, permissions and configuration.

1. Open Calendar and use the navigation/view controls shown to inspect the relevant date and appointment.
2. Check staff, service, timezone and status before changing anything.
3. For an appointment's Google Calendar action, follow Google authorization and grant only the permissions you intend.
4. If offering online sessions, configure Settings > Meeting with the required Zoom or Google Meet account details and connection checks.
5. Enable the supported meeting option on the native service/appointment and verify its meeting action before promising a remote session.

> **Expected result**
> Appointments can be reviewed on the calendar and configured external meeting actions can be used when available.

Practical tip The native calendar loads a limited set of records, up to 300 in the audited route. Use appointment search for older records.

Know the limit Per-appointment Google authorization is not a guarantee of two-way calendar sync or imported external busy time. The upgraded wizard has no separate meeting-provider selection step.



Reference screen; labels may vary. Follow the current instructions. Original appointment calendar with month/week/day and date navigation controls.

35 / RUN THE DAY

Maintain customer records responsibly

Customers entitlement required

Open: /admin/customers

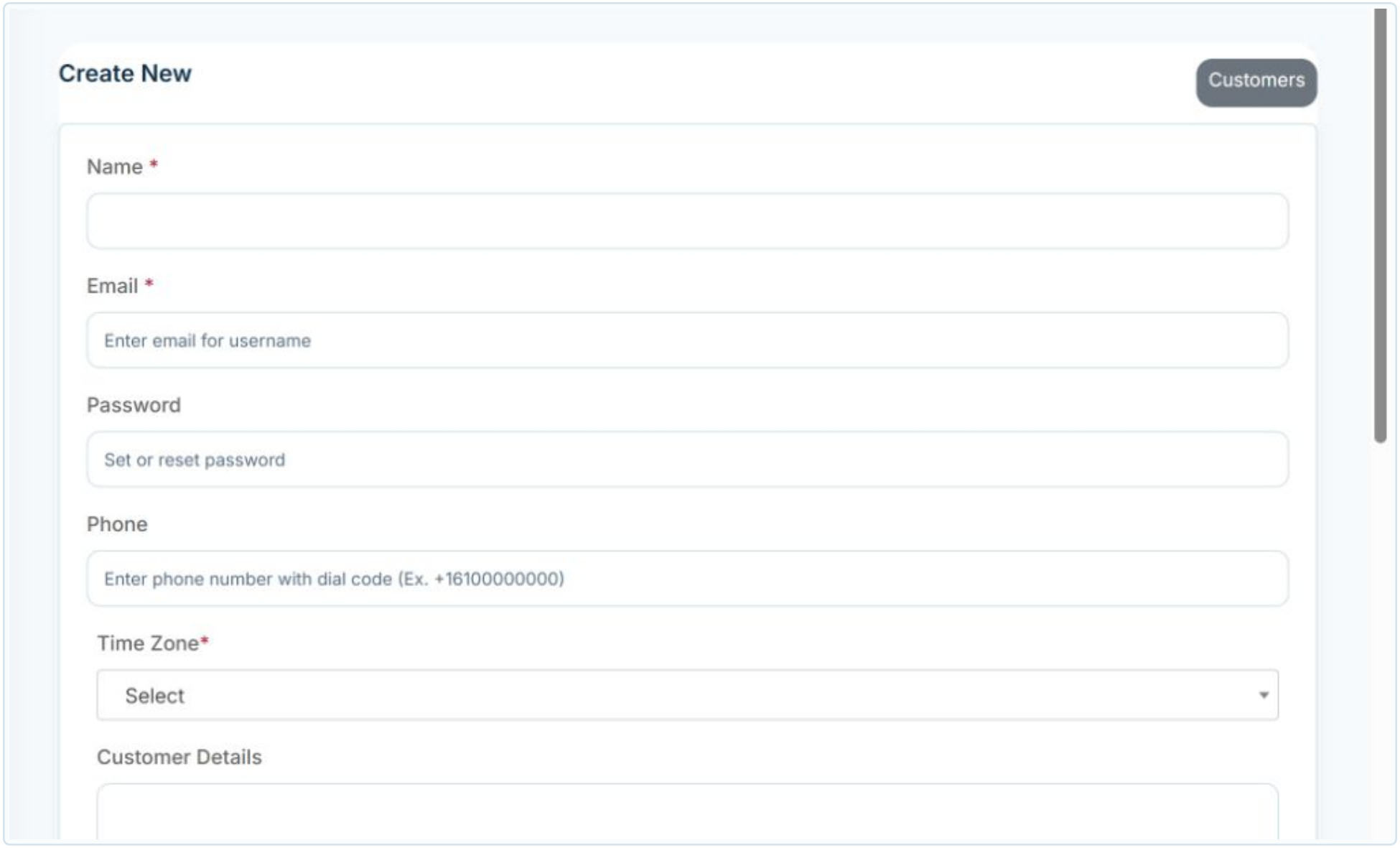
Customer records help the business find contact details and appointment history. Enter only information needed for the service and keep it accurate.

1. Search for an existing customer before creating another record.
2. Create or edit the name, email/username, phone, timezone and useful details.
3. Choose the active/disabled status carefully.
4. If customer sign-in is required and offered, set access through the secure form; do not assume an email change sends an invitation.
5. Open the available customer detail/history view and verify that you are looking at the correct person.

> **Expected result**
> The business can identify and contact the right customer without unnecessary duplicate records.

Practical tip Confirm a customer's new email/phone before overwriting important contact information. Never put account passwords in customer notes.

Know the limit A verified bulk-import/export interface was not found in this owner workflow. Do not expect a CSV import or automatic invitation unless it is actually offered by your account.



Reference screen; labels may vary. Follow the current instructions. Original customer editor: contact details, optional password, timezone and notes.

36 / RUN THE DAY

Review transactions and operational reports

Core appointment workflow

Open: /admin/reports

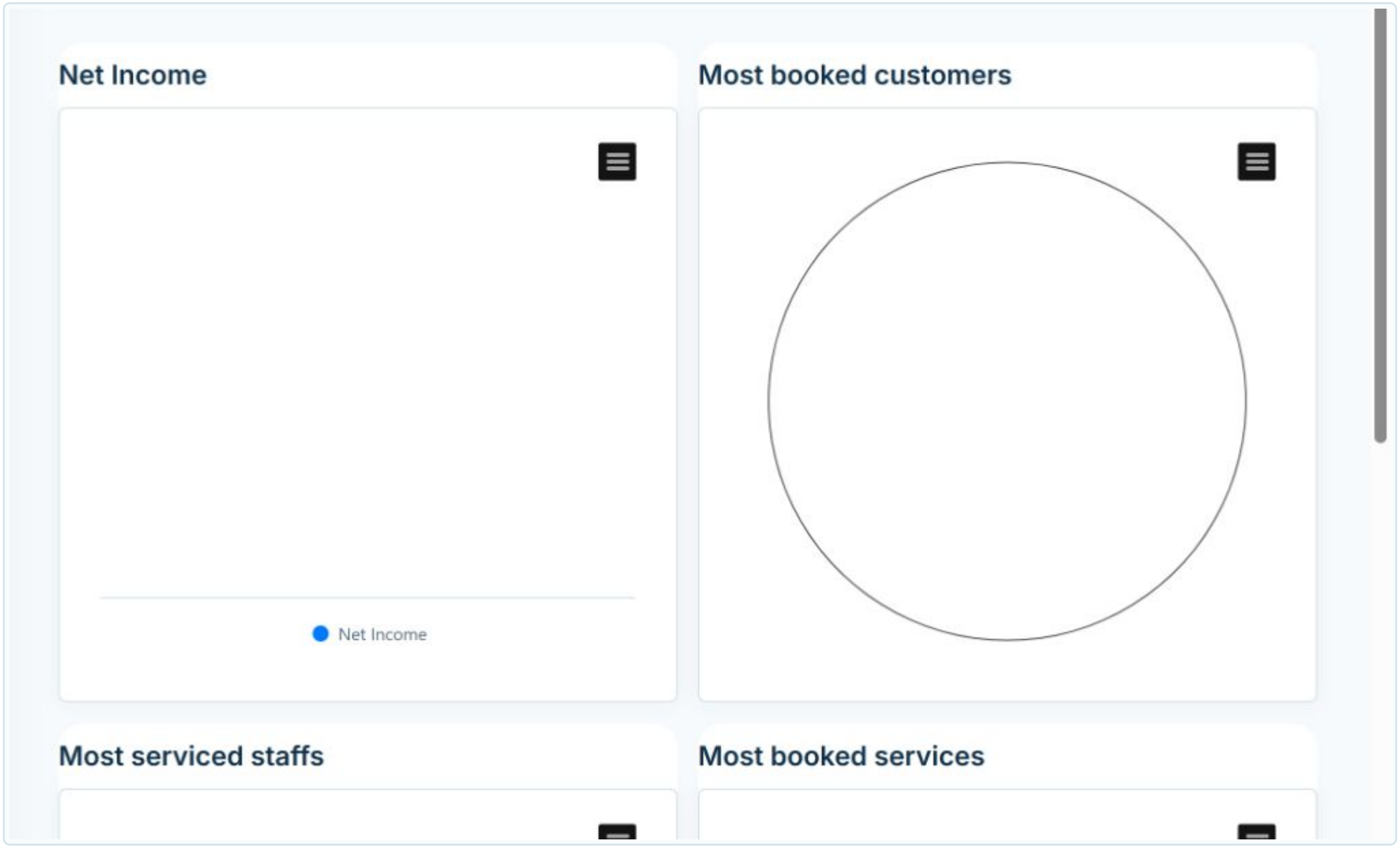
Reports summarize recorded business activity. Use them alongside verified bank/provider records and the dedicated upgraded booking details.

1. Open Reports to inspect net income, most-booked customers, most-serviced staff and most-booked services.
2. Check the relevant period and currency context before comparing figures.
3. Open Transactions at /admin/payment/customer_transactions/?type=appointment to inspect recorded customer payments and available invoice/receipt actions.
4. Distinguish customer-to-business booking payments from business-to-Bookly subscription invoices.
5. Investigate any discrepancy using the booking reference and actual settlement record.

Expected result
You can understand recorded activity and identify items that need reconciliation.

Practical tip A paid label in a transaction list is not independent evidence that a bank settlement has arrived. Match it with the real account.

Know the limit Use only the chart-menu actions offered by the live screen; do not assume they provide a complete customer or transaction export. Operational charts do not replace full accounting, tax or settlement records.



Reference screen; labels may vary. Follow the current instructions. Operational report headings and chart menus in an empty demo view.

37 / STAY INFORMED

Create a holiday campaign and subscription offer

Platform administrators only; business owners redeem valid codes at subscription checkout

Open: /admin/holiday_campaigns

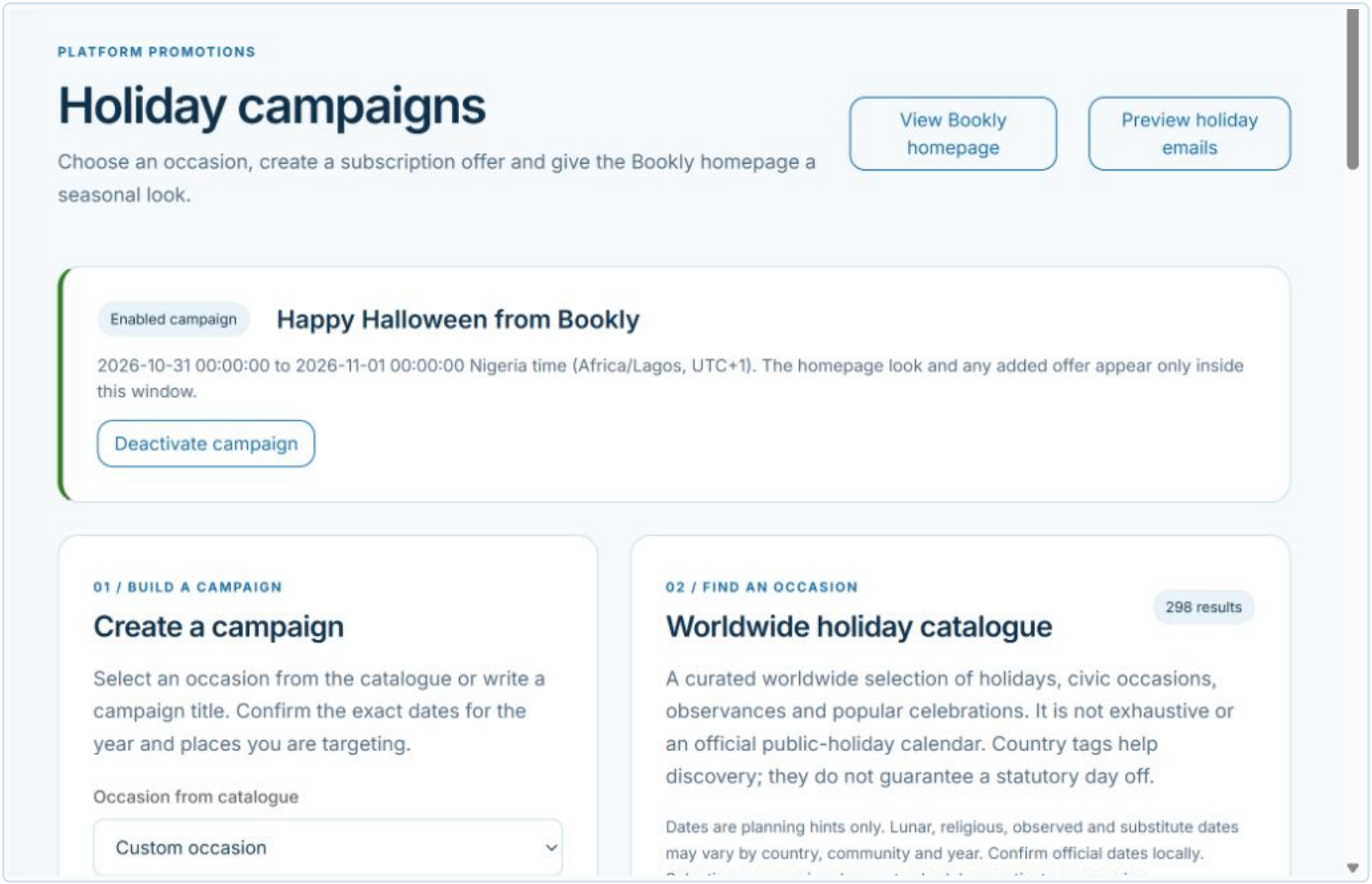
Holiday campaigns give the main Bookly homepage a seasonal look and can offer a subscription discount. Bookly administrators manage these promotions; they do not change a company's service prices. Greeting emails require the business owner's separate opt-in.

1. Open Holiday campaigns. Search the worldwide catalogue and filter by country, month or occasion type, then choose Use occasion or create a custom title.
2. Set the exact start and end in Nigeria time (Africa/Lagos, UTC+1). Dates are managed in the administrator's schedule rather than shown on the compact homepage banner. Confirm movable dates and local observance for the relevant year and country.
3. Choose one of ten visual presets. The compact homepage banner shows the holiday heading and seasonal icons, with an optional discount line only for a valid active code. Moving icons stay inside the banner; reduced-motion preferences keep them static. There is no Pause effects button.
4. To offer a discount, enable the code, enter 3-40 letters/numbers/underscores/hyphens and choose a percentage greater than zero through 100, with up to two decimal places.
5. Check Automatically start and stop to schedule the saved campaign. Saving without that option leaves it inactive until you choose Activate; activating a future campaign queues it for its start time.
6. Review the homepage during the chosen window and check a subscription quote if a code is enabled. Deactivate ends the campaign and disables its automatic schedule; archive an inactive campaign when no longer needed.

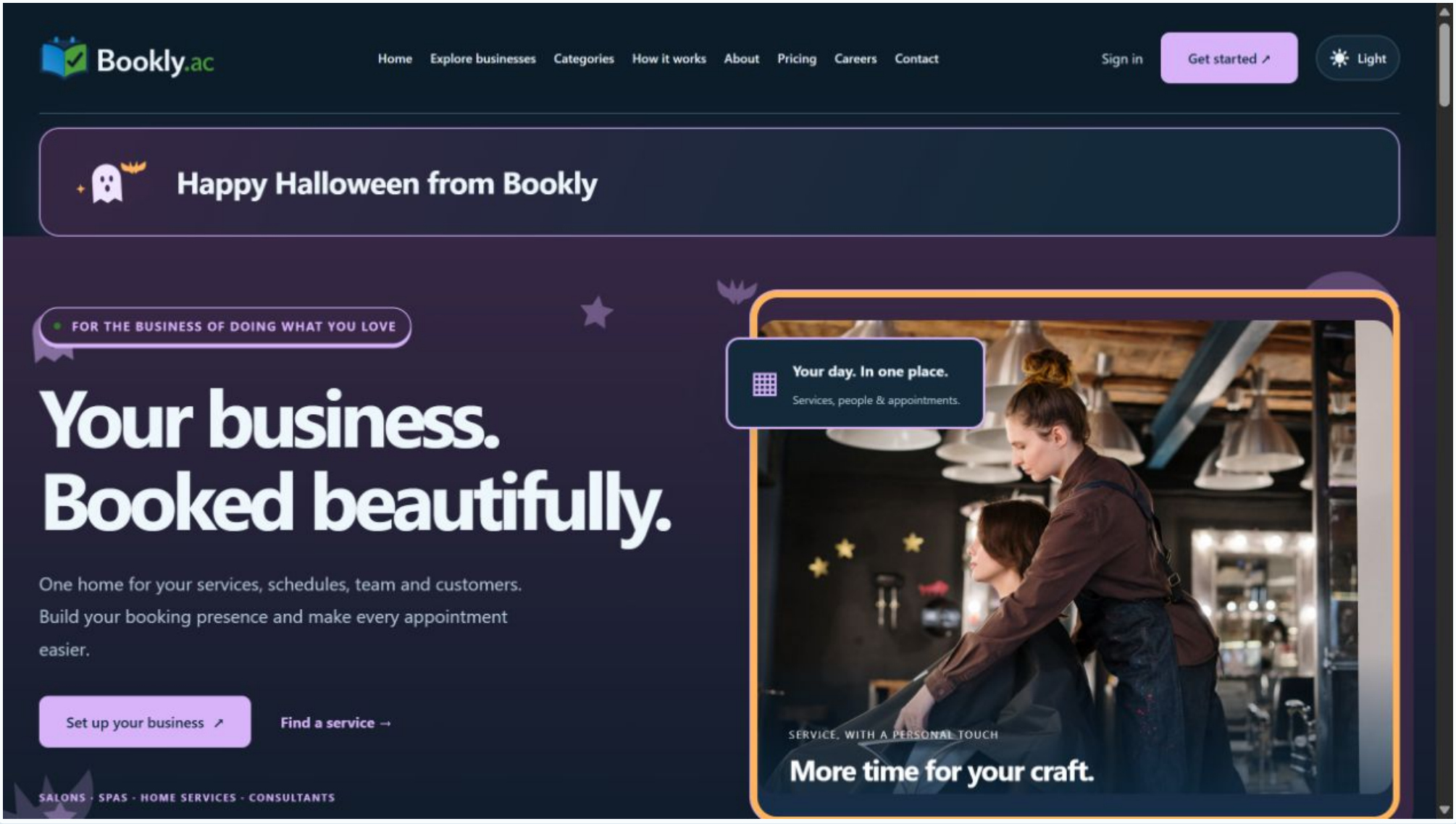
Expected result
A scheduled campaign starts and stops at its Nigeria dates. The seasonal homepage and any explicitly enabled offer appear only within that window.

Practical tip A valid manually activated campaign has priority until it ends. Otherwise, overlapping schedules use the latest start, then highest campaign ID. A subscription code does not change appointment prices or stack with another code.

Know the limit The catalogue is not an official statutory calendar and never schedules itself. There is no automatic yearly recurrence: set and verify each campaign's dates. Effects stay on Bookly's homepage; existing booking agreements and verified started subscription payments keep their terms.



Reference screen; labels may vary. Follow the current instructions. Platform administrator campaign manager: Nigeria (Africa/Lagos) window, worldwide occasion catalogue and seasonal-email preview entry.



Reference screen; labels may vary. Follow the current instructions. Bookly's main homepage with a compact Halloween heading and seasonal icons. This example has no discount line; campaign dates remain in the administrator's Nigeria schedule.

38 / STAY INFORMED

Preview and receive holiday offer emails

Preview and templates: platform administrators; received offers and preferences: eligible business owners

Open: /admin/holiday_mail_preview

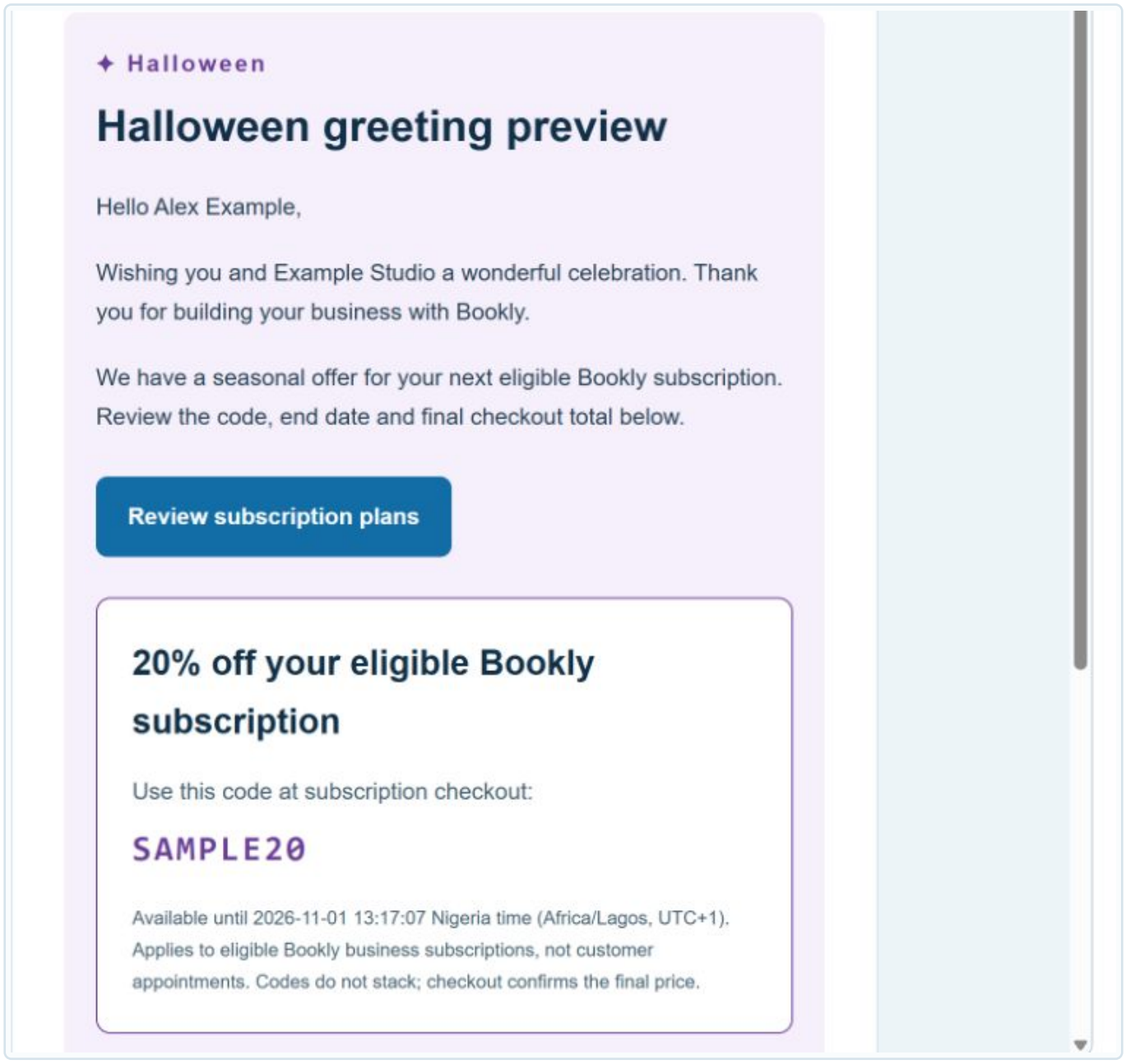
An active holiday campaign with an explicitly enabled subscription code can send a themed offer to eligible business owners who opted in. A code-free campaign can instead send a general greeting to consenting owners.

1. As a platform administrator, open Holiday campaigns and choose Preview holiday emails. Select Holiday subscription offer as Message type, choose an Email theme and choose Preview theme.
2. Review the subject, rich email and expandable plain text. Alex Example, Example Studio and SAMPLE20 are synthetic samples; preview does not send, queue, activate a campaign or create a usable code.
3. Use Email templates to edit the holiday business greeting with its displayed variables. Preview with sample data shows unsaved holiday copy in the sample seasonal frame; Save template is a separate action.
4. Configure the real campaign's subscription code, percentage and Nigeria dates. Explicitly schedule or activate it; only a valid active offer qualifies. Theme-only campaigns use a general greeting rather than an offer.
5. As a business owner, read the received offer's code, percentage and Nigeria deadline. Open Subscription, enter the code and calculate the final amount before choosing a payment method.
6. To stop birthday and holiday emails, follow that link in a received message and confirm on Bookly. You can also change the separate greeting preferences in Subscription profile.

Expected result
Administrators can review all ten seasonal email styles without sending, and business owners can redeem eligible offers or stop future holiday promotions.

Practical tip Booking, security and plan-expiry notices continue after stopping greetings. Preference links belong to the receiving account; do not share them. Subscription discounts do not apply to customer appointment prices.

Know the limit Delivery requires an eligible active, email-verified owner with a business profile and positive holiday consent. Customer, staff and demo accounts are excluded. The five-minute worker rechecks consent, local delivery hours and offer validity, retries failures and tracks delivery to reduce duplicates.



Reference screen; labels may vary. Follow the current instructions. Synthetic seasonal email preview: Alex Example, Example Studio, SAMPLE20 and a Nigeria deadline. This sample does not activate a code or send email.

39 / STAY INFORMED

Choose birthday and holiday greetings

Registered business owners; optional positive consent required

Open: /admin/owner_profile

Birthday and holiday emails are optional owner preferences. Both begin off and require the owner's positive choice. Essential booking, account-security and subscription-expiry notices continue separately.

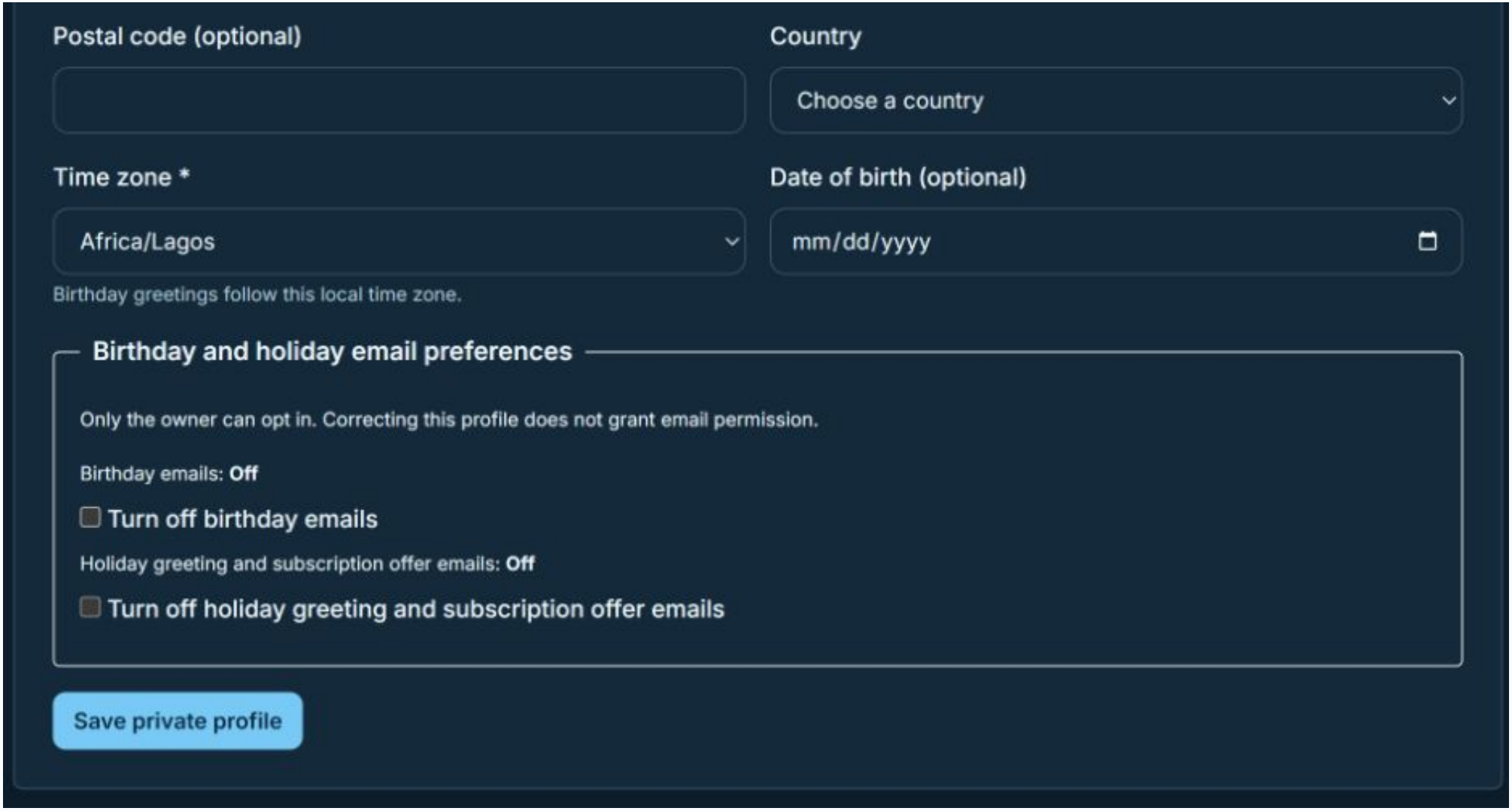
1. Open Subscription profile and review Birthday and holiday email preferences along with the selected Time zone.
2. For annual birthday wishes, enter the optional Date of birth and choose Send me one birthday greeting each year. The birth year is not included in the email.
3. Choose the separate holiday option if you want important holiday greetings and any eligible subscription code the administrator adds.
4. Choose Save profile and continue. You can return, clear either checkbox and save again. An administrator can revoke a preference but cannot opt in on your behalf.
5. To stop both categories from a received greeting, open Stop birthday and holiday emails, then choose that confirmation button on Bookly. Opening the link alone does not change the preference.
6. Check the confirmation. To receive greetings again later, sign in, make your own choices in Subscription profile and save. Keep preference links private.

Expected result
You control birthday and holiday/promotional messages without disabling essential operational notices.

Practical tip Greetings are scheduled between 09:00 and 20:59 in your profile's time zone. Birthday scheduling is once per local year; February 29 is observed on February 28 in a non-leap year. Delivery still depends on email availability.

Know the limit Holiday delivery also needs an effective active administrator campaign within its saved Nigeria window. A code-enabled campaign uses its offer email instead of a second general greeting. The five-minute worker checks consent and validity again; unsubscribing stops birthday and holiday offers together, not booking, security or plan-expiry messages.

Choose birthday and holiday greetings



Reference screen; labels may vary. Follow the current instructions. Administrator view: optional birth date, Africa/Lagos time zone and both greeting categories Off. Administrators can revoke; owners use their own profile's separate opt-in checkboxes.

40 / STAY INFORMED

Read business emails and edit system templates

Email reading: owners; system template editor: platform admins only

Open: /admin/email_templates

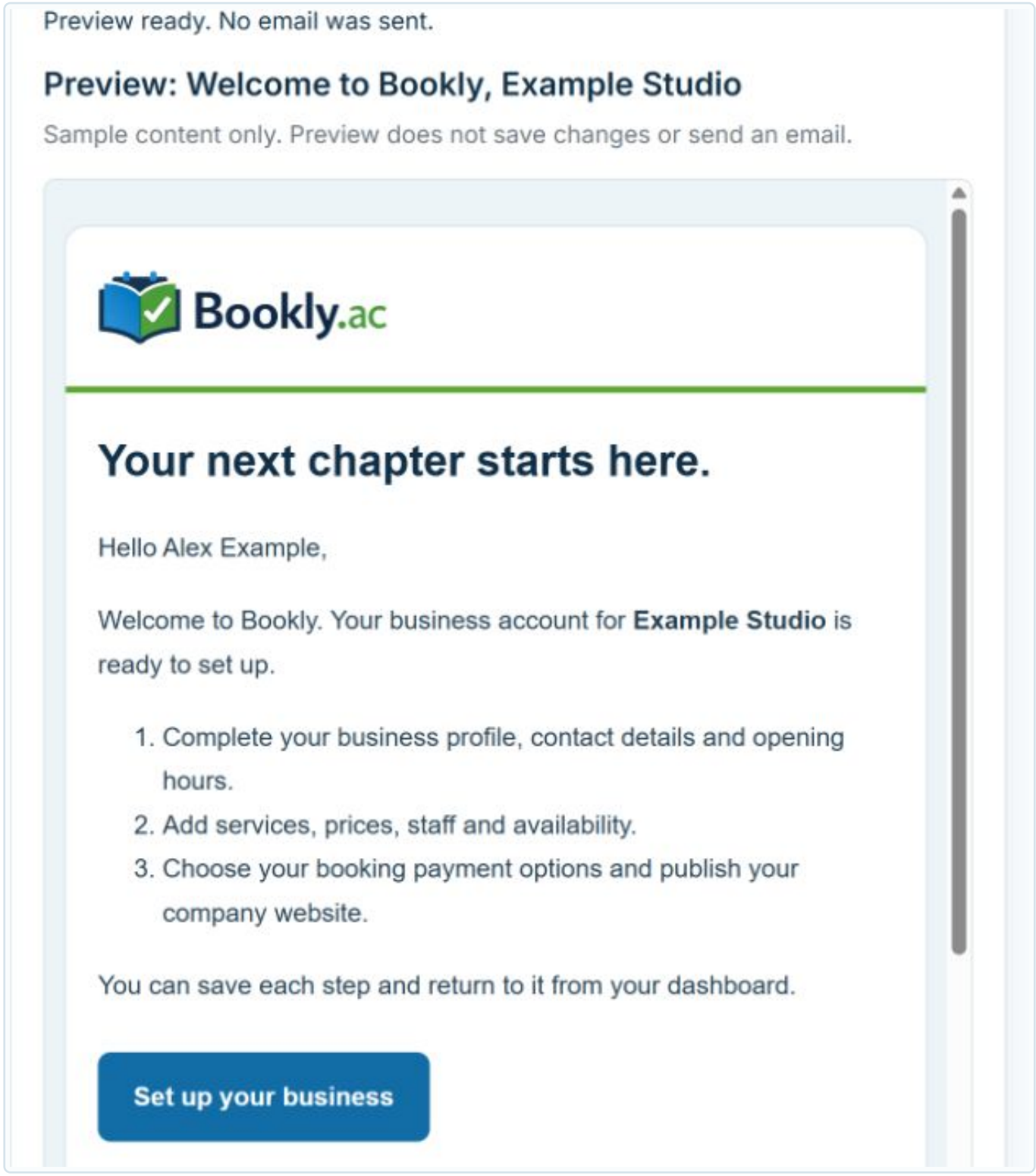
Bookly uses branded HTML emails with a plain-text alternative. Business-owner emails include one download link to this handbook. System template editing belongs to the platform administrator, not individual company owners.

1. As an owner, check the booking reference, event/status, business name, amount and any action link in the message.
2. If the wording is wrong, report the event and non-sensitive error text to Bookly support. Do not forward private receipts or credentials.
3. As a platform administrator, open Email templates and select the event. Under Business, choose Birthday greeting or Holiday greeting without an offer as needed; the holiday subscription-code event remains separate.
4. Edit its Subject (up to 255 characters) and rich Message body. Use only the exact event placeholders displayed beside the editor.
5. Choose Preview with sample data to inspect sandboxed HTML and expandable plain text. Birthday and holiday copy use their matching sample frame. Preview neither saves, queues nor sends.
6. Choose Save template to apply future wording. Bookly adds its standard logo/wrapper/footer automatically.

> **Expected result**
> Future messages use the saved event wording while keeping consistent Bookly presentation and the business guide link.

Practical tip Use only variables listed for that event, for example {{business_name}}, {{booking_reference}}, {{plan_name}}, {{expires_at}} or {{renewal_url}}. The holiday template has a seasonal sample frame; reset-link previews use a dummy link.

Know the limit Templates cover business access, secure recovery, booking/payment changes, subscription events and optional greetings. Holiday email preview also offers Message type for an offer, birthday or general holiday sample. There is no Send Test button; existing custom template copy is preserved.



Reference screen; labels may vary. Follow the current instructions. Platform administrator preview of a rich welcome email using generic sample data. Preview neither saves nor sends.

41 / STAY INFORMED

Understand email and browser booking alerts

Core appointment workflow

Open: /admin/business_studio

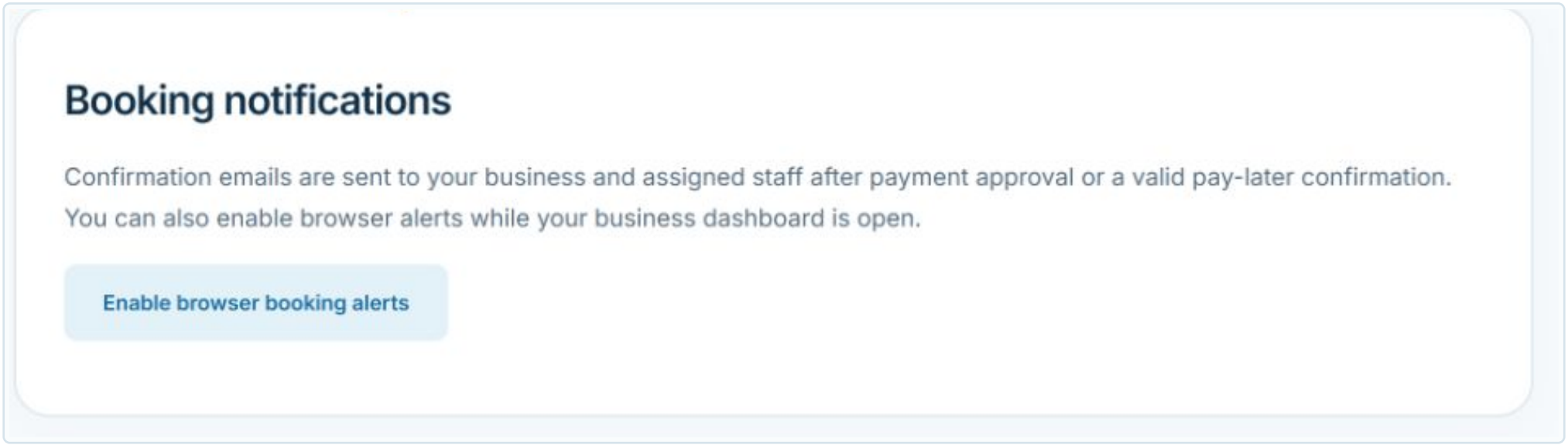
Valid upgraded confirmations notify the customer, business owner and assigned staff by email. Delivery also depends on the configured mail service and background worker.

1. Keep the owner and staff email addresses accurate and monitored.
2. Check inbox and spam folders for expected confirmation messages after a valid booking.
3. In Website & booking rules, choose Enable browser booking alerts and Allow in the browser permission prompt.
4. Keep the owner dashboard open for browser alerts. If permission is blocked, review the browser's site-notification settings.
5. Use native reminder/notification actions only where offered and check the intended recipient before sending.

> **Expected result**
> The business can monitor new bookings through the configured email process and optional open-dashboard browser alerts.

Practical tip Email messages are queued for a worker scheduled about every five minutes. A short delay is different from a failed booking.

Know the limit Browser alerts poll while the dashboard is open; they are not background push when the site is closed. Bookly sends platform messages from no-reply@bookly.ac; use contact@bookly.ac for official Bookly support. Each company's own public contact address remains separate.



Reference screen; labels may vary. Follow the current instructions. Enable browser booking alerts while the owner dashboard is open.

42 / STAY INFORMED

Configure optional SMS and WhatsApp

Optional integration; provider and platform configuration required

Open: /admin/settings/sms

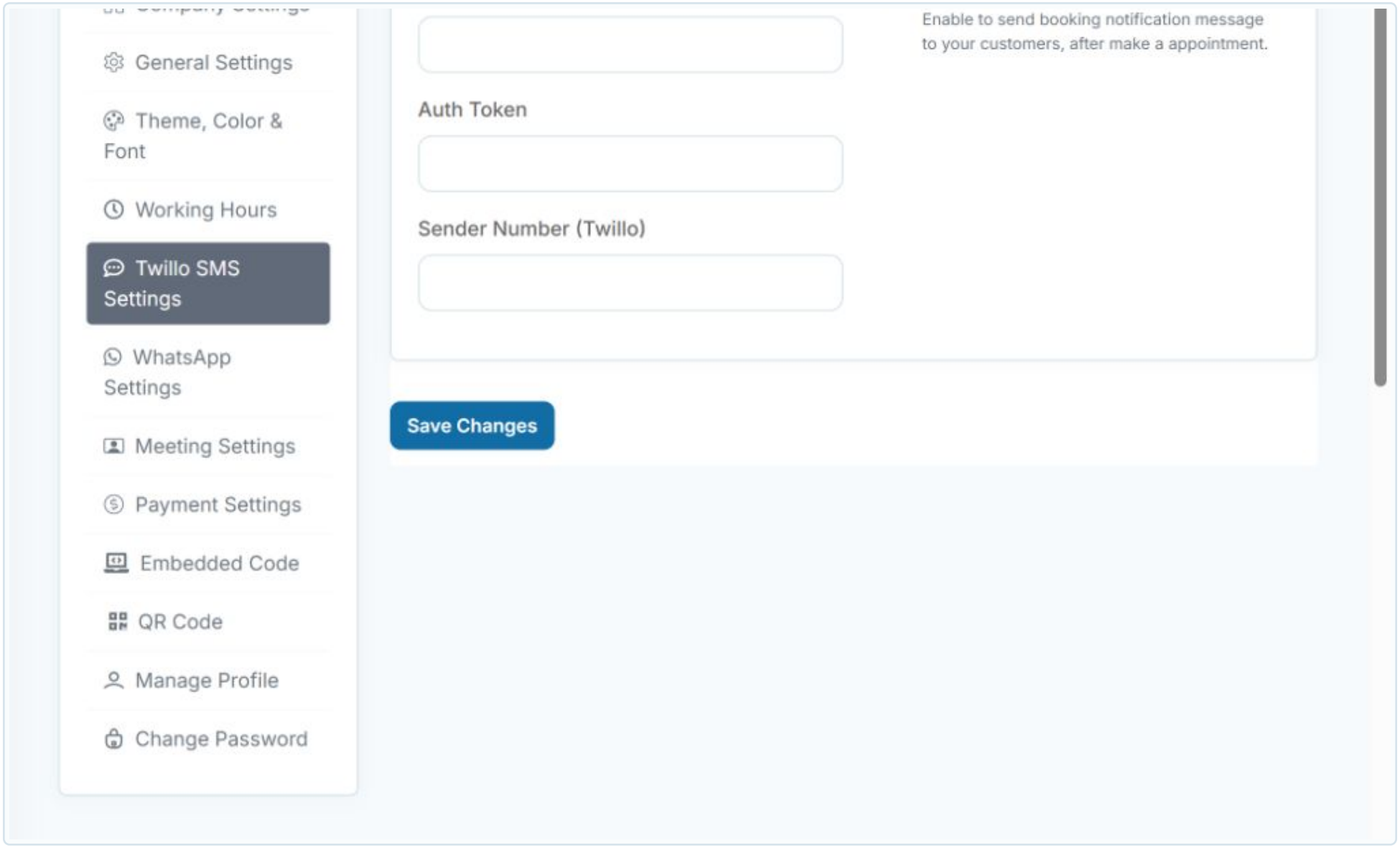
External messaging features need eligible provider accounts, credentials, credits and platform support. They are not automatically active or free.

1. For SMS, open the available SMS settings and enter the required Twilio account SID, auth token and sender number privately.
2. Choose the supported booking-confirmation/reminder switches and save.
3. For WhatsApp, open /admin/settings/whatsapp and choose the available provider, such as Ultramsg, Wazfy or Wappblaster.
4. Enter the provider's required instance/token/API fields directly in the secure settings and enable only the intended service.
5. Use the provider's supported testing and check actual delivery/usage before relying on it for customers.

Expected result
An enabled, eligible messaging integration can deliver the specific events supported by its configuration.

Practical tip Keep messaging credentials out of screenshots. Confirm customer communication permissions and provider rules before use.

Know the limit Owner SMS settings can be hidden when global Twilio is used; WhatsApp settings can be hidden when global messaging is enabled. Do not assume every upgraded booking sends every external message.



Reference screen; labels may vary. Follow the current instructions. Optional Twilio SMS setup; provider credentials are blank and the switch is not enabled.

43 / STAY INFORMED

Complete your private subscription profile

Business owners; complete contact profile required for new subscription checkout

Open: /admin/owner_profile

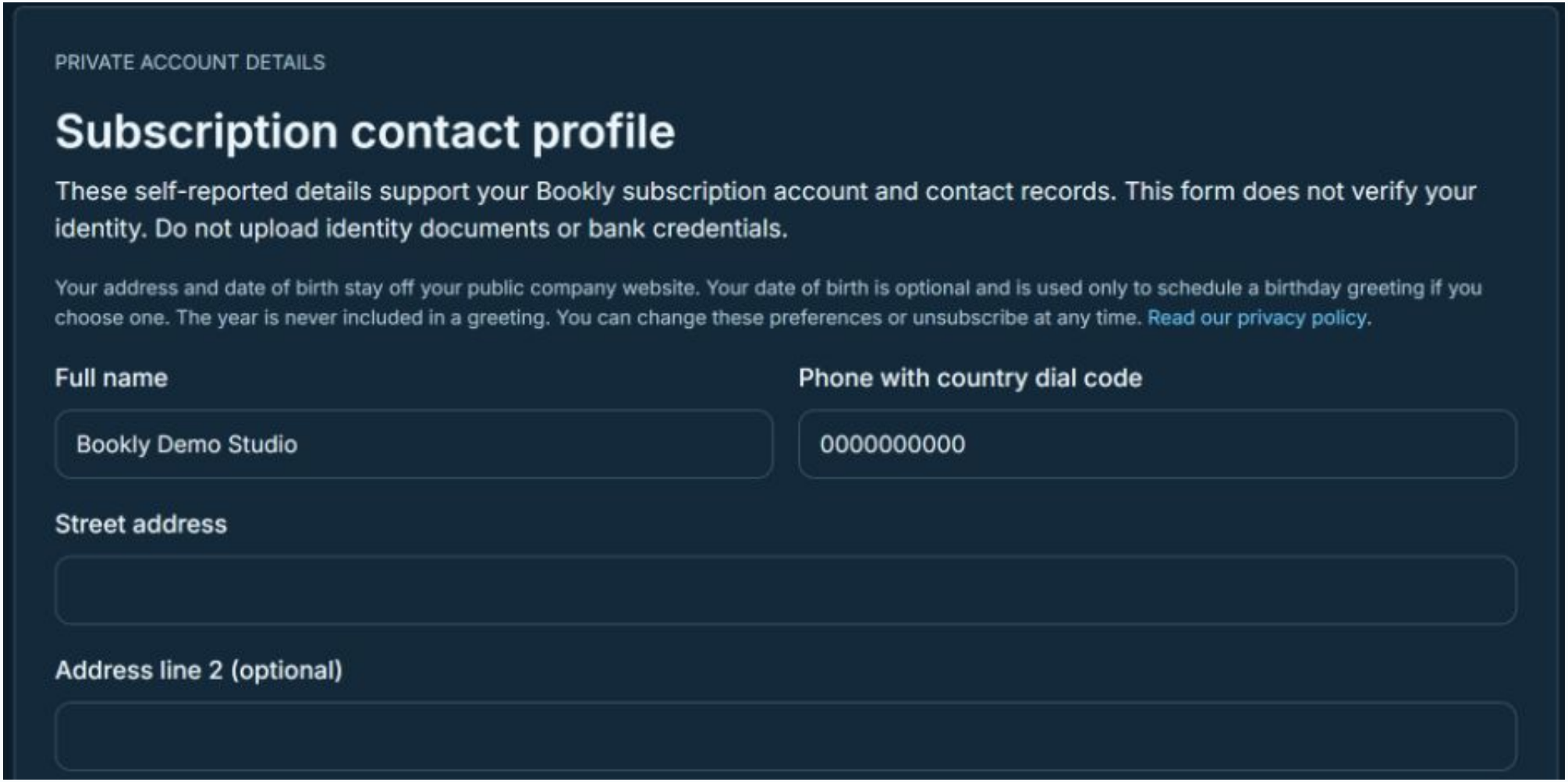
Your subscription profile is a private, self-reported contact record. Complete it before starting a new Bookly subscription checkout. It is separate from the company details published on your booking website.

1. Open Subscription profile in the owner sidebar, or use its link on Subscription. An incomplete profile redirects a new plan selection or checkout here.
2. Enter Full name, Phone with country dial code, Street address and City. Choose Country and a valid Time zone; the default is Africa/Lagos.
3. Add Address line 2, State / region and Postal code only if useful. Date of birth is optional; leave it blank unless you want to provide it for birthday greetings.
4. Choose birthday and holiday emails separately if wanted. Both options start off. Birthday greetings require a valid date of birth; leaving either option off does not affect bookings or subscription eligibility.
5. Choose Save profile and continue. If a validation message appears, correct the information it describes; the form retains your submitted values.
6. After a successful save, continue to the selected subscription action, or review Subscription. Check the actual quote and payment status before purchasing.

Expected result
A complete private contact profile allows a new subscription checkout, with optional greeting preferences under the owner's control.

Practical tip This profile's time zone schedules greeting emails. Set the company's booking time zone separately in General settings, and review both when the business moves.

Know the limit Saving this form does not verify your identity. Do not upload identity documents or bank credentials. Address and birth date stay off the public company website; the birth year is not included in greetings. Existing bookings, Free access and already-started provider returns remain available.



Reference screen; labels may vary. Follow the current instructions. Administrator view of the shared private subscription contact form using Bookly Demo Studio. Address fields are blank and the phone is fictional; owner consent controls are managed separately.

44 / STAY INFORMED

Edit a business owner's account details

Platform administrators only; business-owner accounts

Open: /admin/users

Platform administrators can correct a business owner's account information and separate private subscription profile. Identify the intended owner before changing sign-in details or account status.

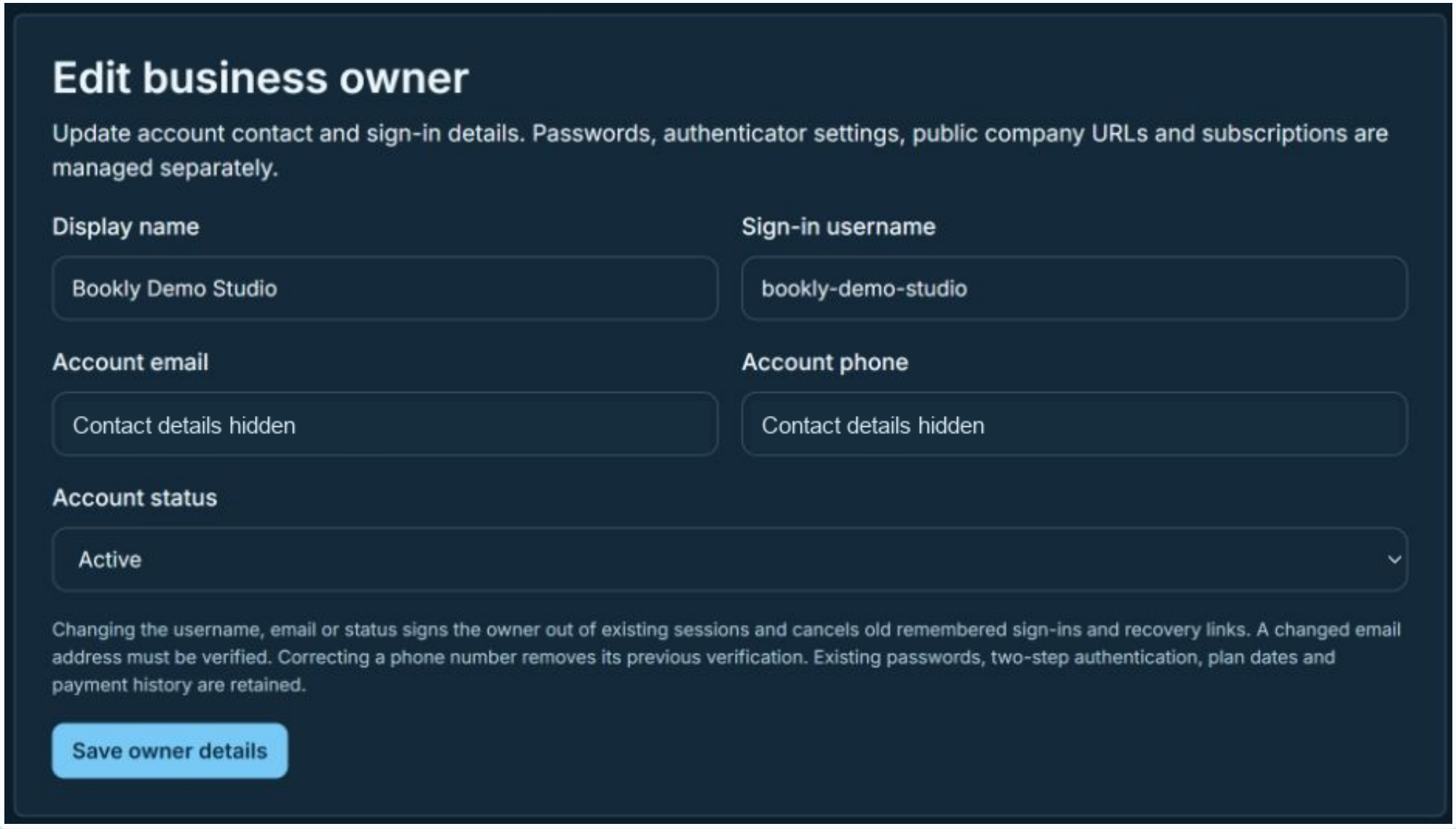
1. Open Users, find the correct business owner and choose Edit. Check the existing name, email and account before making changes.
2. In Edit business owner, review Display name, Sign-in username, Account email, Account phone and Account status. Choose Active or Disabled deliberately.
3. Choose Save owner details. Changing username, email or status ends the owner's older sessions, remembered sign-ins and reset links. A changed email must be verified; changing phone removes its previous verification.
4. Use the separate Subscription contact profile form to correct private name, address, country, time zone or optional birth date. Choose Save private profile for that form.
5. Review the displayed greeting-consent status. Administrators can turn emails off, but only the owner can positively opt in from their own profile.
6. Check the success message and saved values after each form. Confirm that the owner understands any changed sign-in identity before they next sign in.

> **Expected result**
> The intended owner has corrected account or private contact details, with greeting permission still controlled by that owner.

Practical tip The account and private profile have separate save buttons. Correcting the subscription address or name does not rewrite the public company website; review Company settings separately when needed.

Know the limit This editor does not change passwords, authenticator settings, public company URLs, plan dates or payment history. Use the dedicated secure workflow for each of those tasks. Do not copy protected credentials or personal profile values into public descriptions or page reports.

Edit a business owner's account details



Reference screen; labels may vary. Follow the current instructions. Administrator account editor for the generic demo business. Contact details are permanently hidden in this document asset; username, status and the separate Save owner details action remain visible.

45 / STAY INFORMED

Manage your plan, renewal and invoices

Business-owner billing; platform payment methods managed by Bookly

Open: /admin/subscription

Your subscription determines available modules and record limits. Complete the private Subscription profile before starting a new purchase. Subscription payments go from the business to Bookly, separate from customer appointment payments.

1. Open Subscription and review the effective plan, active/grace/Free status, displayed expiry timezone and current usage limits.
2. Read Latest billing record separately. A pending payment does not confirm renewed access.
3. Choose Free, Starter, Growth or Scale, and monthly or annual billing for a paid plan. Choose one-time payment or automatic subscription only where the configured provider offers it.
4. Review the fixed quote: currency, subscription amount, discount, tax, processing fee, final total and payment-start deadline. Use only the methods actually shown.
5. For bank transfer, follow the platform bank instructions for that currency and upload proof meeting the displayed requirements. Access changes only after actual funds are approved.
6. If an online provider is enabled, complete its secure checkout and check the verified result. A return link alone cannot activate a subscription.
7. Use View invoices at /admin/payment/lists for billing records. Confirm Current access after successful payment approval.

Expected result
You can obtain an agreed subscription quote, submit payment through an available method and verify the resulting access.

Practical tip Quotes last up to 24 hours and can end earlier with a campaign. Start payment before the displayed deadline. Already-started provider payments are verified against their original amount; do not pay twice after a delayed return.

Know the limit Free has no trial countdown. Paid methods depend on provider configuration, currency and merchant eligibility. Automatic renewal is available only where offered; bank transfer and crypto are one-time payments with manual renewal. Customer appointment accounts are separate.

46 / STAY INFORMED

Know what happens when a plan expires

Core appointment workflow

Open: /admin/subscription

Paid plans have a renewal window and 48-hour grace period. If they are not renewed, the public business page remains available with Free-plan limits. Bookly does not offer a free trial.

1. During the last 72 hours before expiry, renewal reminders are scheduled at 09:00 and 18:00 UTC. They stop at expiry; Free and lifetime plans have no expiry reminders.
2. At expiry, read the expiry email and exact 48-hour grace deadline. Current plan features remain available during grace.
3. Renew through Subscription and verify successful access/payment status. A pending payment alone does not complete renewal.
4. After grace, the current Free-plan limits apply. Check Subscription and the pricing page for the active service, staff, customer and monthly appointment limits.
5. Review retained records after downgrade or renewal. Excess services/staff are hidden, not deleted; renewal does not automatically reactivate them.

> **Expected result**
> You understand the deadline, grace period and practical effect of remaining on Free.

Practical tip Free keeps the public page live, but it cannot accept a new record when its relevant customer/appointment limit is reached. Upgrade when more capacity is needed.

Know the limit Excess active services are selected for deactivation randomly when Free limits are applied; records are retained. Review the exact expiry timezone and grace deadline shown in your account. Renewing does not necessarily reactivate every hidden service.

47 / OPTIONAL ORIGINAL MODULES

Add service extras and custom inputs

Original services module; compatible flow and plan required

Open: /admin/services/service_extra

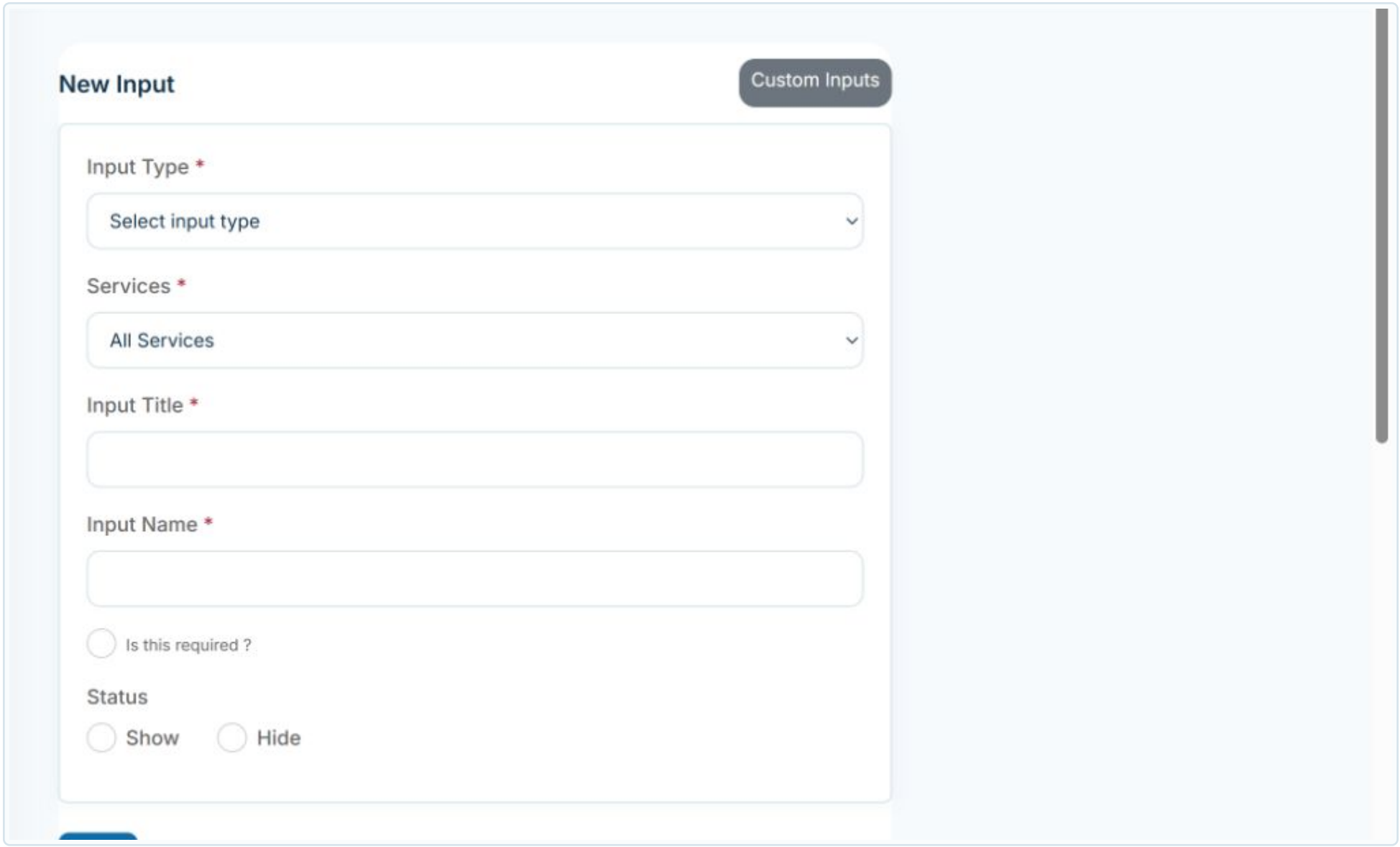
Extras and custom inputs belong to the original service workflow. Configure them only with a compatible customer experience and verify where they appear.

1. Create an extra in Service extra and review its available fields.
2. Edit the relevant service and select the extras offered with it.
3. Open Custom inputs at /admin/form to add a text or textarea field with a useful internal name/title.
4. Choose all services or selected services, required yes/no and show/hide as appropriate.
5. Save and test the compatible original flow to check visibility and whether required data is collected.

> **Expected result**
> Supported original service forms can offer the intended extras and request relevant customer information.

Practical tip Keep custom questions short and necessary. Avoid requesting sensitive identity or financial information unless there is a clear lawful operational need.

Know the limit The upgraded appointment wizard does not currently render extras or custom inputs. Creating them in the owner dashboard does not add them to that wizard.



Reference screen; labels may vary. Follow the current instructions. Original Custom Inputs editor: type, service scope, labels, required flag and visibility.

48 / OPTIONAL ORIGINAL MODULES

Manage native recurring services and reminders

Optional original service flow; platform jobs and plan access required

Open: /admin/services

Original recurring services use a separate workflow from upgraded one-time appointments. Future occurrences are generated when due and remain subject to valid availability and current plan limits.

1. In a compatible original service editor, choose Recurring service, the Number of service value and the offered weekly/monthly repeat interval. The native monthly interval is 30 days.
2. Set an accurate service price, duration, staff assignment and availability, then save and test the compatible original booking flow.
3. Review the initial appointment and expected next occurrence. Do not assume that all future dates have already been created or reserved.
4. If a due occurrence is missing, check staff/calendar conflicts and ask support to review it. A missed or unavailable occurrence needs owner attention rather than an overlapping insertion.
5. Keep customer/staff emails current. Approved appointments receive scheduled email reminders at the platform-configured lead time, calculated in the business timezone.

Expected result
You can operate the enabled native series and understand how its future appointments and reminders are handled.

Practical tip Agree how a recurring service is priced and reconcile actual payments. Generating another occurrence does not create a new provider charge or recurring card subscription.

Know the limit Reminder delivery uses the five-minute background worker and the configured email template; it does not activate paid SMS/WhatsApp. The upgraded wizard still does not offer recurring-service selection.

49 / OPTIONAL ORIGINAL MODULES

Use coupons and the original POS

Original modules; booking-pos/services plan features required

Open: /admin/pos

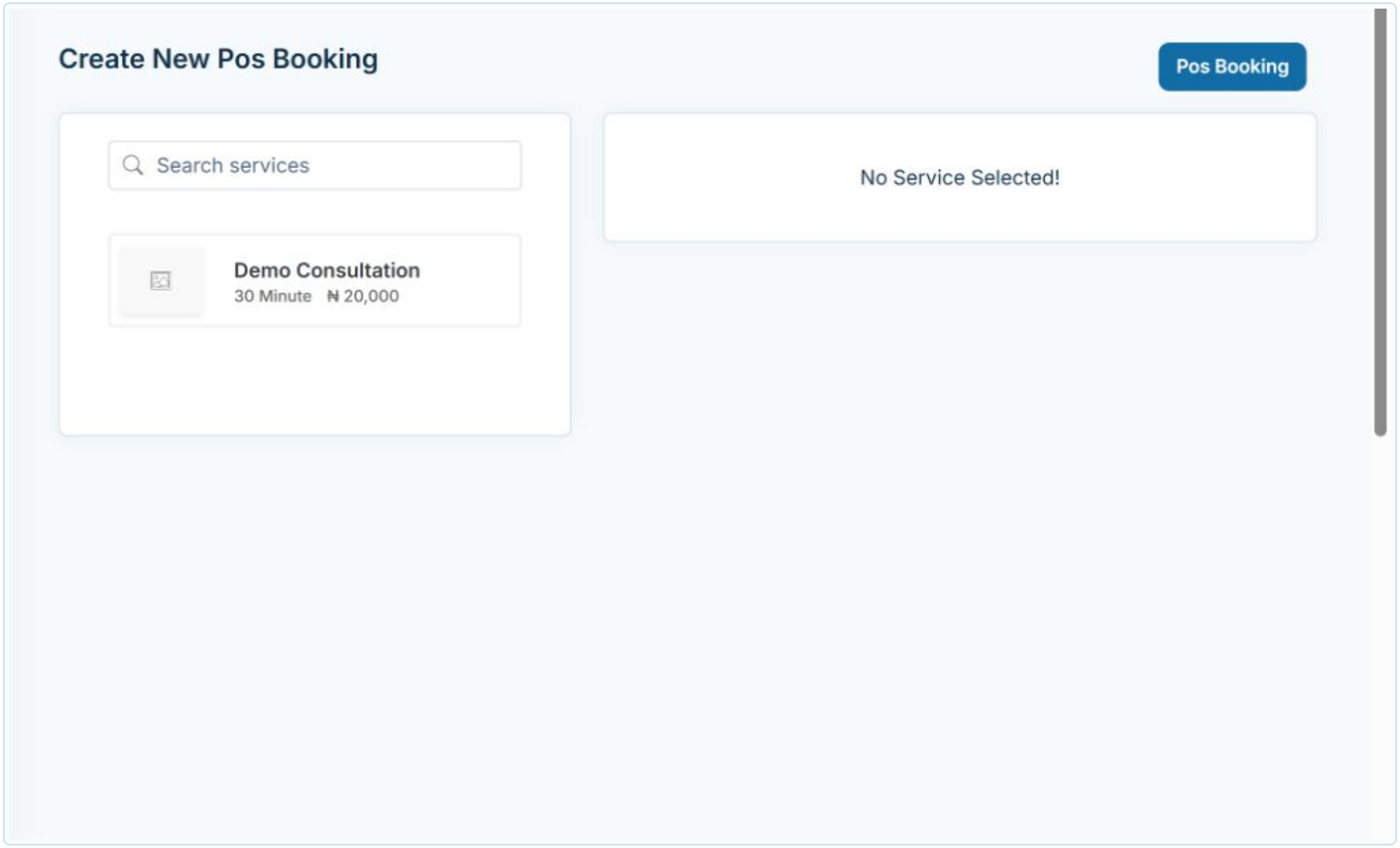
POS is an operator-led original booking workflow. Coupons are native service discounts, separate from platform subscription offers.

1. In Coupons, choose the service, code, discount, validity dates, usage limit, once-per-customer rule and visibility.
2. Open POS and select or add the correct customer.
3. Find services and add supported native extras. Select date/time and staff.
4. Review subtotal and any supported discount/coupon, then continue to the actual payment-recording screen.
5. Check the resulting appointment/payment record and reconcile collected money.

> **Expected result**
> An operator can create an intentional native POS appointment and apply a valid native discount where supported.

Practical tip Check dates and usage restrictions before publishing a coupon. A discount code is not proof that payment was received.

Know the limit The upgraded appointment wizard has no coupon-entry control. POS compatibility with every new deposit/proof safeguard is not established. This module does not promise card-terminal hardware, cash drawers, printing or offline operation.



Reference screen; labels may vary. Follow the current instructions. Original POS: find a demo service and build an operator-led appointment.

Create an event, venue and ticket offer

Events entitlement, enablement and native theme required

Open: /admin/events

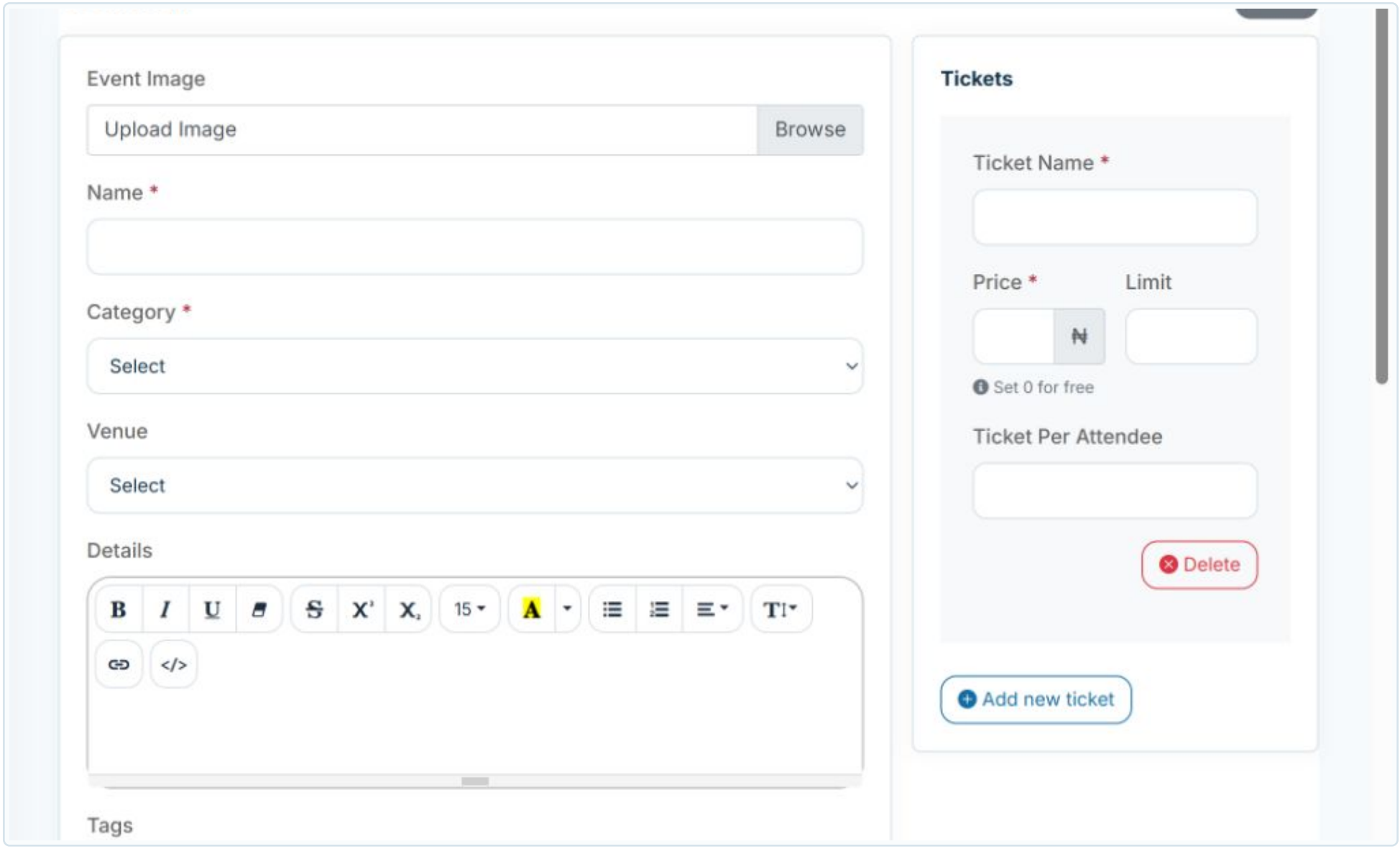
Events use a separate native booking flow and a compatible native website theme. They are not upgraded multi-service appointments.

1. Enable the available events feature. Create an event category and venue when needed.
2. Add the event image, name, category, venue, description, date/time and relevant contact/link information.
3. Review supported artists, organizer, tags and SEO fields; set show/hide deliberately.
4. Add tickets with name, price, quantity limit, sales period, per-attendee quantity and details.
5. Preview the event in its compatible theme and manage bookings in Events booking. To approve an existing offline event payment, use the confirmation form: verify the actual bank receipt, tick the required receipt confirmation and submit.

> **Expected result**
> An available event has accurate timing, venue and ticket terms in its native booking flow.

Practical tip Venue records can include address, contact, capacity and seating controls. Check capacity and ticket quantities together.

Know the limit Older event online-payment return routes are disabled because they do not provide the required receipt/provider verification. Do not launch paid native event checkout until its secure gateway replacement or private proof integration is reviewed. New company designs do not automatically render native events.



Reference screen; labels may vary. Follow the current instructions. Original event editor with event details and ticket fields.

51 / OPTIONAL ORIGINAL MODULES

Manage products and their orders

Products entitlement and compatible native theme required

Open: /admin/product

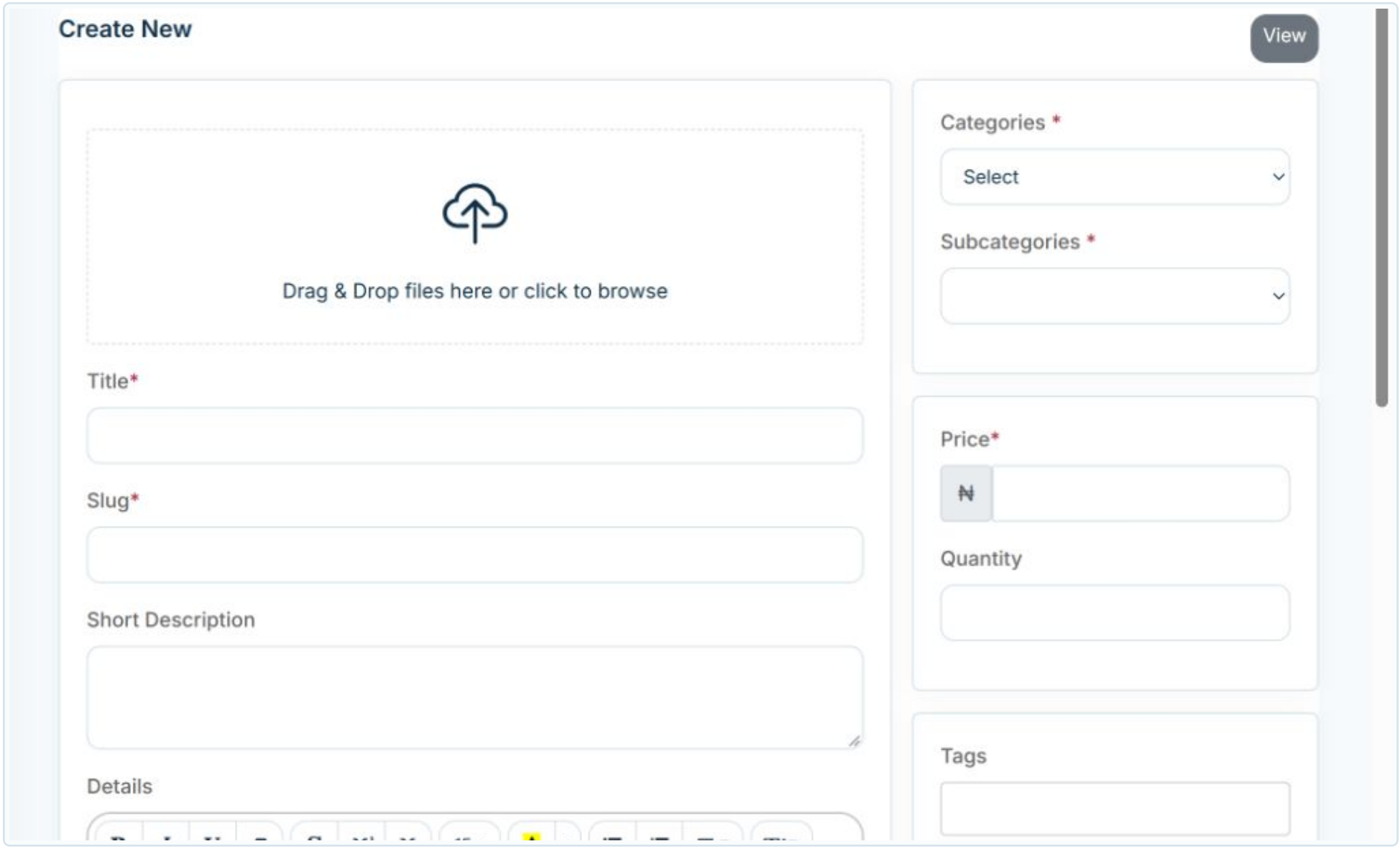
Products and orders form a separate native commerce module. Use it only when enabled for the account and supported by the selected theme.

1. Create product categories/subcategories, then add a product with title, slug, images, description and details.
2. Review price/old price, SKU, quantity, attributes, tags, SEO and show/hide status.
3. If offering a downloadable product, use its dedicated switch/file control and verify the intended file.
4. Preview the product and check stock-out or limited-stock behavior as appropriate.
5. Open Orders to inspect items, customer, total, shipping and payment/order status; use only the supported confirmation, delivery or cancellation actions.

Expected result
The native catalogue and order records represent the products and fulfilment process the company actually offers.

Practical tip Check the actual payment and delivery outcome before marking an order paid or delivered.

Know the limit Older product online-payment return routes are disabled because they do not provide the required receipt/provider verification. Do not launch paid native product checkout until its secure gateway replacement or private proof integration is reviewed. New appointment-focused designs do not automatically render native products.



Reference screen; labels may vary. Follow the current instructions. Original product editor with media, catalogue fields, price and stock quantity.

52 / OPTIONAL ORIGINAL MODULES

Manage pages, testimonials and fonts

Optional original modules; plan and template dependent

Open: /admin/pages

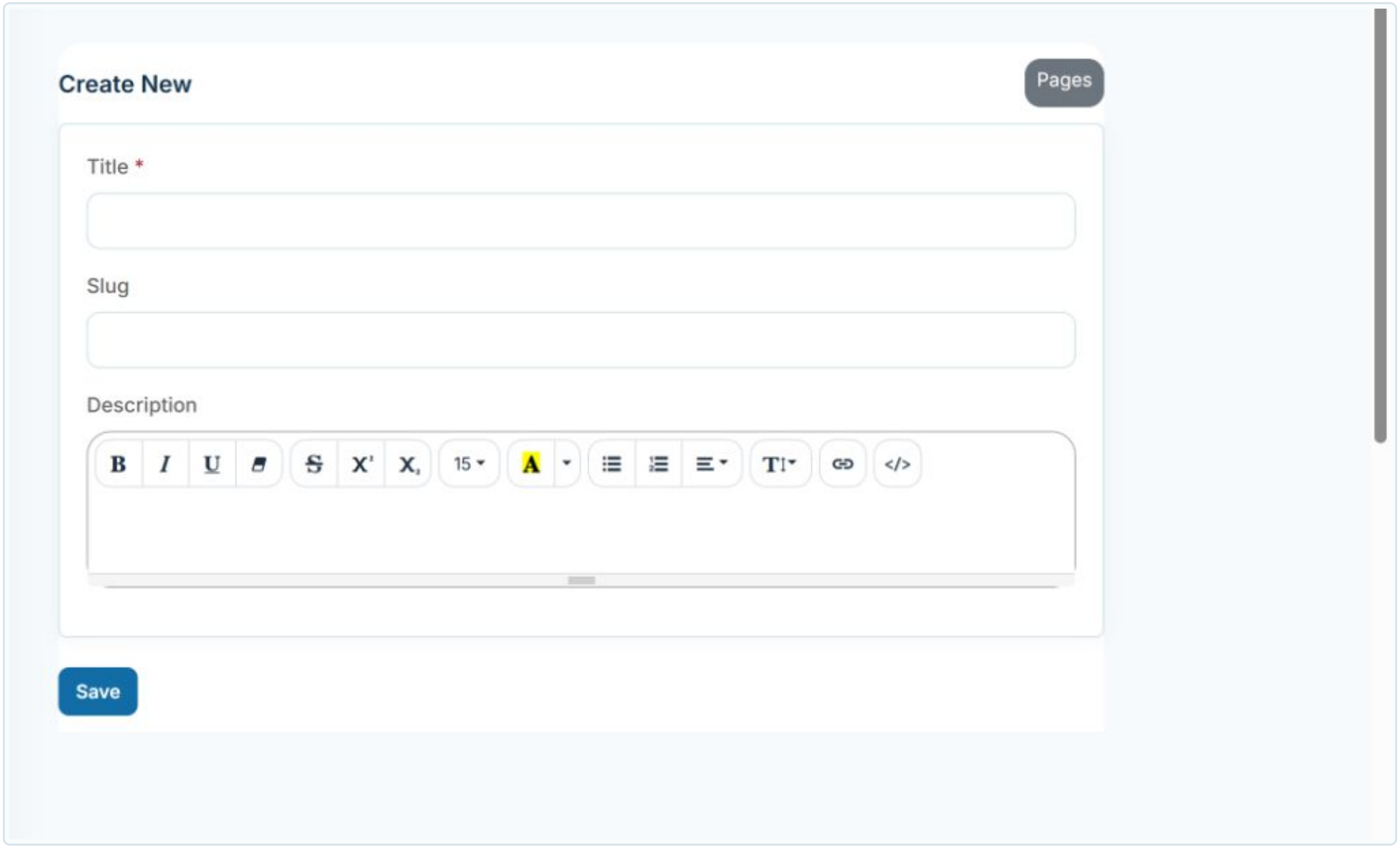
Original website modules offer additional content for compatible native themes. Check the saved public design rather than assuming every module is visible.

1. Use Pages to create a clear title, unique slug and formatted content; choose a language where offered.
2. Use Testimonials for a permitted customer image, name, designation and accurate feedback.
3. Use Fonts to choose the native font configuration available on the account.
4. Review show/hide status and any language setting for each record.
5. Save and open the actual public theme to verify placement, link behavior, readability and mobile layout.

> **Expected result**
> Supported native content sections show accurate, permission-based information in a compatible design.

Practical tip Use readable headings and concise paragraphs. Open every page link after changing its slug.

Know the limit New designs do not automatically display native pages or testimonials. Contacts appears for a compatible native theme (style 4); it is not a universal helpdesk. No arbitrary font-upload or general visible owner blog workflow is promised.



Reference screen; labels may vary. Follow the current instructions. Original Pages editor: title, slug and rich content.

53 / OPTIONAL ORIGINAL MODULES

Understand referrals and direct settlement

Optional referral programme, if enabled

Open: /admin/referral/user

Referral rewards, where enabled, are separate from customer appointment payments. Bookly does not collect or refund money on behalf of businesses.

1. Open the available referral overview and read current eligibility rules.
2. Use only an offered referral link and make your affiliation clear when sharing it.
3. Check any eligible reward balance and the available payout instructions.
4. Reconcile actual received rewards with the recorded reference; a status does not itself transfer money.

> **Expected result**
> Referral rewards stay separate from your business merchant accounts.

Practical tip Customer payments settle to the business through its own configured provider or bank account.

Know the limit There is no guaranteed referral earning or automatic payout promise. Do not use platform referral controls as customer booking settlement instructions.

54 / CAREERS AND OPPORTUNITIES

Explore careers and apply to Bookly

Public; open vacancies only

Open: /careers

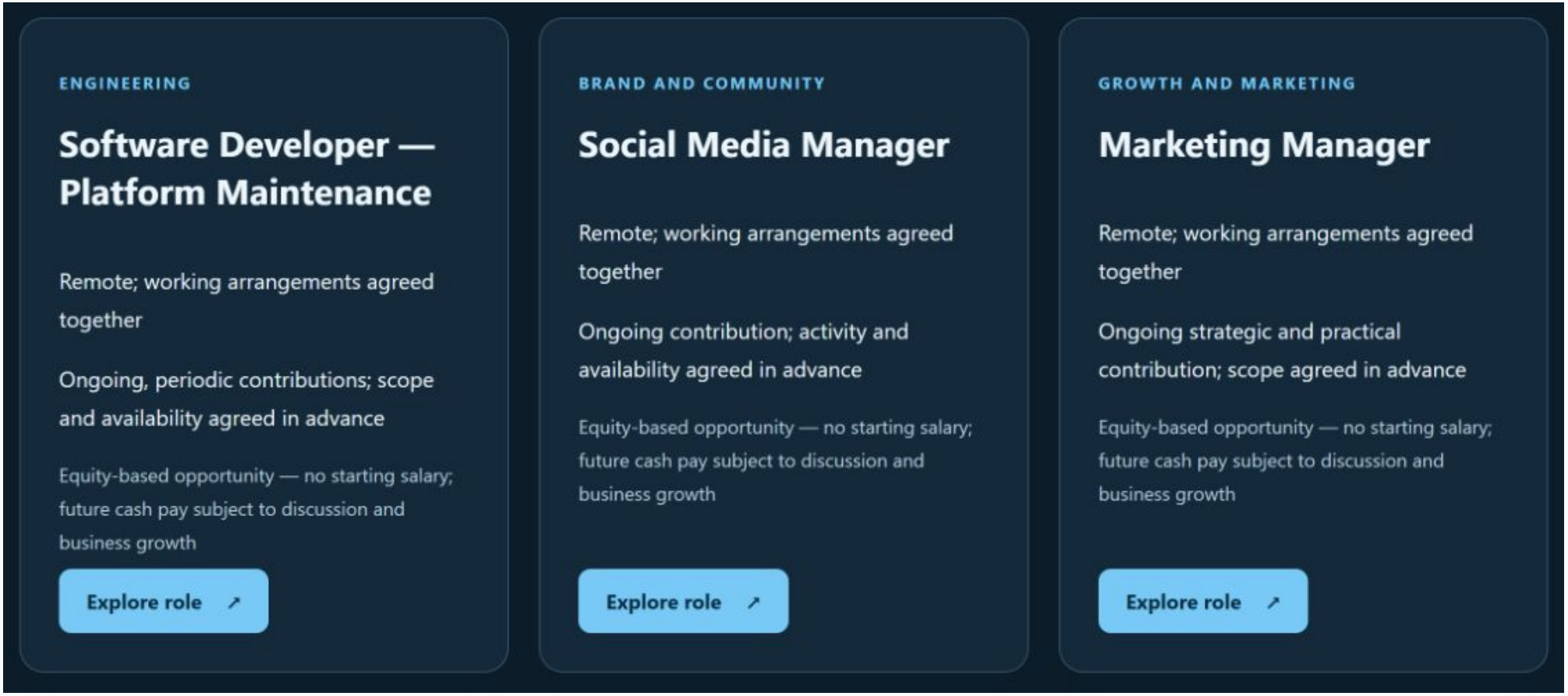
Bookly's Careers page lists open opportunities and links to each full description. The initial roles cover software development, social media and marketing. Read the working arrangements and compensation terms before deciding whether to apply.

1. Open Careers and choose Explore role. Read the responsibilities, relevant experience, location, commitment and full role description.
2. Review Compensation carefully. The initial three opportunities have no starting salary and promise no fixed equity percentage. Equity, vesting and any future cash pay require separate written agreement before engagement; future pay is uncertain.
3. Enter Full name and Email address. Phone is optional. Complete Availability and working arrangement, including the time zone and availability you can discuss.
4. Write Relevant experience (at least 80 characters) and Why this opportunity? (at least 40 characters). Work examples / portfolio links are optional; use one complete HTTPS link per line. There is no file-upload field.
5. Review the compensation and privacy acknowledgements and select them deliberately. Complete the displayed human verification, then choose Send application.
6. Check the successful result on Careers and save the BC application reference. The application is stored before email delivery, so an email delay does not erase a saved submission.
7. For corrections or a deletion enquiry, contact Bookly support at contact@bookly.ac with your reference and application email. A repeat submission for the same role may return the existing reference rather than replace its content.

Expected result
A valid submission is stored privately for manual hiring review and has a reference you can use when contacting support.

Practical tip Share only work you have permission to disclose. Do not submit identity documents, bank information, passwords or other people's private data. If a rate-limit message appears, wait before trying again.

Know the limit Applications are reviewed by the Bookly team without automated hiring scores or selection decisions. An acknowledgement is not a job offer, an equity grant or a promise of future pay. Only open vacancies accept applications; closed roles retain their description without the form.



Reference screen; labels may vary. Follow the current instructions. The three initial Bookly opportunities show their working arrangements, compensation summary and Explore role action. Open a role for its full description and application form.

55 / CAREERS AND OPPORTUNITIES

Publish jobs and review applications

Platform administrators only

Open: /admin/careers

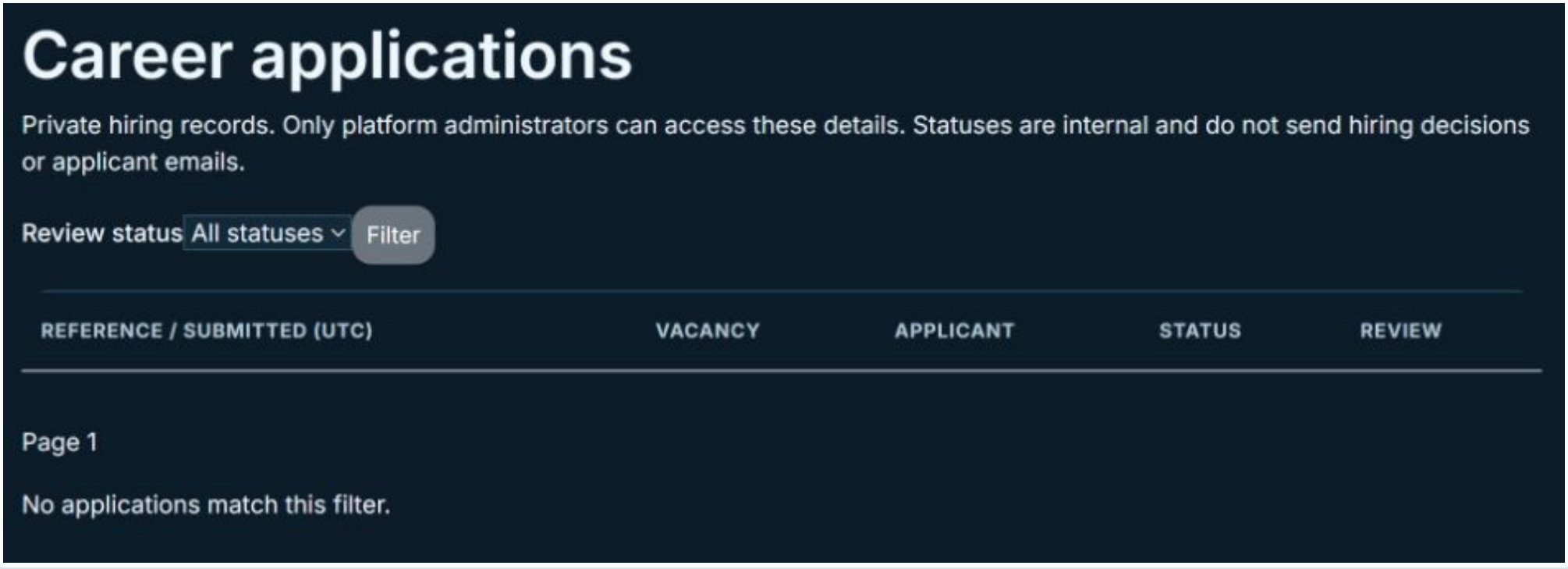
Platform administrators manage Bookly's public vacancies and private applications. Job publication and application review are separate tasks; review statuses organize human decisions rather than selecting applicants automatically.

1. Open Careers in the administrator panel. Choose Add vacancy, or find an existing role and choose Edit.
2. Complete Job title, the unique vacancy address, Department, Location / arrangement and Commitment and availability. Add an explicit Compensation summary and Full description with responsibilities, experience and expectations.
3. Describe each vacancy's actual compensation terms accurately. The initial three openings have no starting salary and negotiated equity. For future roles, state their own terms clearly; do not promise an equity percentage or future payment that has not been agreed.
4. Choose Save vacancy. Open roles appear in Careers and accept applications. Draft and Archived roles are hidden; Closed roles keep their public description but stop new applications. Use Update status to change a saved role.
5. Open Review applications at /admin/careers/applications. Filter by New, Reviewing, Contacted or Closed, then choose Review beside the intended application.
6. Read the applicant's details and work examples yourself. Review link destinations before opening them; their content has not been fetched or verified by Bookly. Record Private review notes, choose Internal review status and select Save internal review.
7. Contact applicants through your normal hiring process when appropriate. Saving an internal status or note does not send an applicant email or hiring decision.

> **Expected result**
> Public job listings show the intended availability and terms, while applications remain accessible only to platform hiring administrators for manual review.

Practical tip Descriptions use plain text: separate paragraphs, headings ending with a colon and hyphens for bullet lines. HTML is displayed as text. Keep review notes relevant and factual.

Know the limit New-application alerts go to contact@bookly.ac and applicant acknowledgements follow a successful save. Delivery is separate from the private hiring record. Only platform administrators can read applications; review statuses and notes do not send applicant decisions.



Reference screen; labels may vary. Follow the current instructions. Administrator Career applications view with review-status filters and zero applications. Applicant details remain private; internal review changes do not send hiring decisions.

56 / HELP AND REFERENCE

Report a page and download this handbook

Core appointment workflow

Open: /support

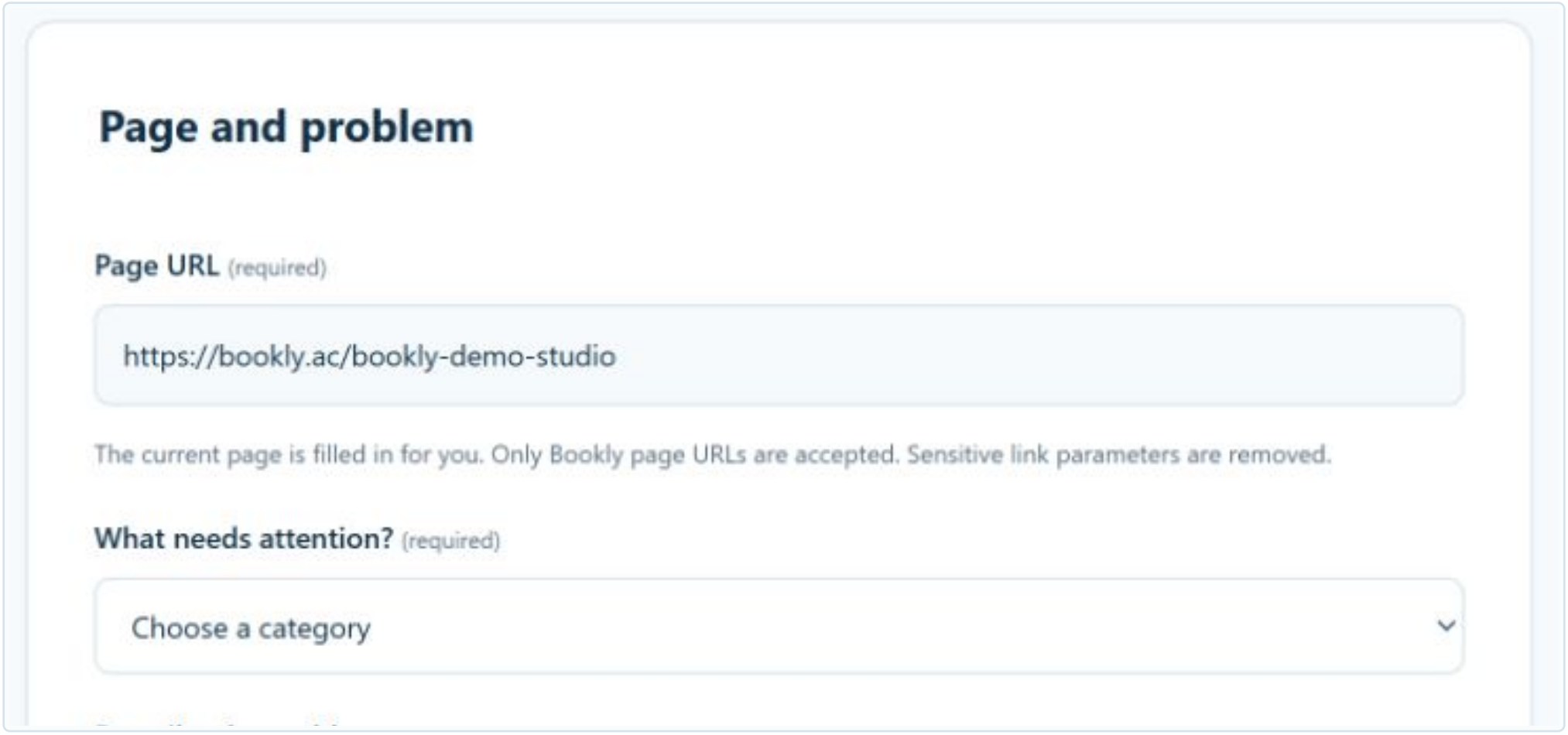
Use Report this page when a specific Bookly page is broken, confusing or incorrect. Reports go to Bookly support at contact@bookly.ac through the platform mail service. Use that same official address for a general Bookly support enquiry.

1. Choose Report this page from the page's utility/footer area, or open bookly.ac/support.
2. Check the captured Bookly source URL. Choose the category that best describes the issue.
3. Enter your name, reply email and a clear problem description between 20 and 4,000 characters. State what you expected, what happened and the approximate time.
4. Complete the security verification and submit. Save the displayed BR report reference after successful submission.
5. Use the Business user guide link in the website footer, FAQ or company emails to download the current PDF.

Expected result
Support receives a focused page report with a reference and contact details for a manual reply.

Practical tip The fixed handbook link is https://bookly.ac/assets/docs/bookly-business-user-guide.pdf. Save a local copy and re-download after major platform updates.

Know the limit The report form has no attachments. Never include passwords, security codes, full card details, receipts or private customer data. Confirmation is shown on-screen; an automatic reporter acknowledgement email is not promised.



Reference screen; labels may vary. Follow the current instructions. Report this page: review the captured Bookly URL and choose the problem category.

57 / HELP AND REFERENCE

Troubleshoot missing services or time slots

Core appointment workflow

Open: /admin/services

An empty calendar usually means one or more availability rules do not match. Work through the setup in order rather than changing several settings at once.

1. Confirm the service is active and is an eligible one-time minute/hour appointment.
2. Check the service's staff assignment and the staff member's active status.
3. Compare business and staff hours, breaks and the selected location/branch.
4. Review holidays, the business timezone, service duration, buffers and current-time rules.
5. Check existing appointments and active holds. Try a clearly open later date, then recheck the saved public booking page.

> **Expected result**
> You identify the rule preventing a slot and can correct the relevant setup without disrupting valid bookings.

Practical tip A multi-service selection needs enough time for its full sequential plan. Test one eligible service first to narrow down the cause.

Know the limit Do not create duplicate bookings to test an occupied hold. If the problem persists, report the page URL, service, date and non-sensitive error text; do not include private customer details.

58 / HELP AND REFERENCE

Troubleshoot checkout, payment and email

Core appointment workflow

Open: /admin/booking_suite

Start from the booking's actual status and reference. Separate an unavailable payment method, an unverified payment and a delayed notification.

1. For a missing method, check business credentials, enabled method, booking currency and provider/account eligibility.
2. For transfer problems, check the bank instructions, due amount and the current upload file/size rules. Keep the booking reference and the exact error message.
3. For pending verification, check actual funds and the proof-review action; do not approve on image alone.
4. For a security-check error, reload once and finish verification. If the public form returns 429 or Too many requests, wait for the retry period before resubmitting; report a persistent error with its exact message.
5. For email delays, check recipient spelling and spam, allow the queued-mail interval, then report the booking reference and issue.

> **Expected result**
> You can describe the failing stage accurately and avoid treating a browser redirect or email delay as a verified payment result.

Practical tip Online requests normally expire after 30 minutes without verified payment; quotes may expire sooner. Bank transfers remain pending after upload opens. Missing payment/proof gets a reminder after five minutes with the completion link. Do not pay twice after a delayed status update.

Know the limit Never disable verification, reuse private links in public posts or send API secrets/receipts through the general report form. Use authorized booking screens for receipt review.

59 / HELP AND REFERENCE

Build a daily and weekly operating routine

Core appointment workflow

Open: /admin/dashboard/user

A reliable booking service depends on regular review. Small maintenance tasks prevent double handling, unclear payments and outdated availability.

1. Start the day by checking upcoming appointments, pending transfer proofs and any failed/pending actions.
2. Verify real funds before approvals. Track remaining balances and communicate status changes clearly.
3. Keep the dashboard open if using browser alerts and check the monitored business inbox.
4. Before leaving, reconcile completed services and collected payments. Review the next working day's staff and location availability.
5. Weekly, check holidays, prices, public contacts/policies, subscription status and the phone/light/dark booking journey. Keep the private subscription contact profile, greeting preferences and profile time zone current.

Expected result
The business maintains accurate availability, follows up money owed and notices customer-facing problems early.

Practical tip Assign a person responsible for reviewing transfer proofs within the configured reservation period and arranging cover when they are unavailable.

Know the limit Record changes in the relevant Bookly screen and verify their result. Email or social messages alone do not update the booking's availability or payment record.

60 / HELP AND REFERENCE

Complete your launch checklist

Core appointment workflow

Open: https://bookly.ac/

Use this final check before promoting a new company page or a major redesign. Review with a clean customer view as well as the signed-in owner account.

1. Identity: logo, business name, slug, monitored contacts, location, policies and permission-based images are correct.
2. Availability: active services, prices/durations, staff assignment, staff/business hours, breaks, holidays and locations are correct.
3. Payments: currency, enabled policies/default, deposit percentage, bank details and eligible methods are saved and previewed.
4. Journey: services through status work on phone and desktop; menus and light/dark text are readable.
5. Operations: proof reviewer, monitored inbox/staff addresses, balances, subscription renewal and support route are understood. Review the private contact profile and choose greeting preferences deliberately.

> **Expected result**
> The company is ready to share a clear booking offer and handle the bookings it receives.

Practical tip Repeat the relevant checks after changing currency, payment credentials, staff assignment, opening hours, company slug or website design.

Know the limit A visual preview alone is not a financial test. Keep any test booking clearly identified and deliberately authorize provider live charges rather than assuming they are simulated.

61 / HELP AND REFERENCE

Keep booking terms consistent

Core appointment workflow

Open: /admin/booking_suite

These terms help owners, staff and customers describe the same event without confusing a payment choice with a payment result.

1. Payment policy: when money is due - full at booking, percentage deposit or at the visit. Payment method: how money is collected, such as bank transfer or an eligible gateway.
2. Booking total: the agreed full amount. Due now: the amount payable at booking. Remaining balance: the amount still payable later.
3. Pending verification: evidence/payment needs review; it is not a confirmed appointment. Confirmed: the valid booking has completed its required confirmation checks.
4. Hold: a temporary reservation during checkout or transfer review. Snapshot: the saved services, currency and payment agreement for that booking.
5. Native/original module: a separate retained workflow. Entitlement: a plan's permission to use a feature. Public slug: the company URL identifier, separate from the login email.

> **Expected result**
> Messages about payment and status use precise language and are easier to resolve.

Practical tip Quote the booking reference whenever asking about a specific appointment. Keep its private status link within the intended customer/business conversation.

Know the limit A receipt, transaction label, return page or sent email can describe a stage in the process. Use the booking's verified payment and appointment status to determine the outcome.

62 / HELP AND REFERENCE

Quick links for everyday work

Core appointment workflow

Open: https://bookly.ac/

Use these verified route shortcuts after signing in with the right account. Some screens require a plan feature or platform enablement.

1. Start: /register.html; /login.html; owner dashboard /admin/dashboard/user; profile /admin/settings/profile; password /admin/settings/change_password.
2. Security: /security for authenticator setup and status. Start password recovery from /login.html; use the private link in the recovery email rather than a bookmarked token URL.
3. Setup: /admin/settings/company; /admin/settings/general; /admin/services; /admin/staff; /admin/settings/working_hours; /admin/settings/holidays; /admin/location.
4. Website/payments: /admin/business_studio; owner payment accounts /admin/payment/user; upgraded booking review /admin/booking_suite.
5. Daily work: /admin/appointment?type=all; /admin/appointment/calendars; /admin/customers; /admin/reports. Plan and profile: /admin/subscription; /admin/owner_profile.
6. Share/help: /admin/settings/embedded_code; /admin/settings/qr_code; /support; public opportunities /careers; handbook /assets/docs/bookly-business-user-guide.pdf.
7. Platform administrators: /admin/users; /admin/holiday_campaigns; sample messages /admin/holiday_mail_preview; system templates /admin/email_templates; hiring /admin/careers.

> **Expected result**
> You have a compact map back to the main setup, operating and support screens.

Practical tip Public company pattern: https://bookly.ac/{company-slug}. The company booking action opens its upgraded appointment journey.

Know the limit This handbook documents the audited feature set as of 31 October 2026. Live labels, available packages and provider requirements can change; use the current secure screen and ask support when the behavior differs.