WHIZZIQ USER GUIDE

OCTOBER 2025

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BOOKING

🌟 How to Create an Appointment Type in WhizzIQ

This guide shows you how to set up your services so customers can book appointments easily — whether you're a **doctor, hairdresser, makeup artist, school, farmer, or market vendor.**

🧩 1. Basic Information Section

This section tells WhizzIQ what kind of service or appointment you offer.

Field	What It Means	Example (Doctor)	Example (Salon)	Example (Farmer/Market)
Name	The title of the service or appointment type.	"30-Min Consultation"	"Wash & Blow Dry"	"Fresh Produce Pickup"
Description	A short note explaining what's included.	"Includes patient assessment and prescription."	"Shampoo, condition, and blow dry."	"Customer collects pre-packed produce order."
Duration (minutes)	How long the service usually takes.	30	60	15
Price (Relevant Currency)	How much you charge for the service.	50	100	0 (if free)
Color	Choose a colour to make this appointment stand out on your calendar.	Blue for general, Green for check-ups	Pink for styling, Gold for makeup	Green for sales slots
Active	Switch **ON** to show this appointment on your booking page. Switch **OFF**	✅ On	✅ On	✅ On

	if you don't want it visible yet.			

⚙️ 2. Advanced Settings

These settings control how often and when people can book this service.

Field	What It Does	Example Use
Buffer Before (minutes)	Adds time **before** each appointment (for setup, cleaning, or prep).	A salon adds 10 minutes to sanitize tools.
Buffer After (minutes)	Adds time **after** each appointment (for clean-up or reset).	A doctor adds 5 minutes to update patient notes.
Max Per Day	Sets how many times this service can be booked per day. Leave empty for unlimited.	A makeup artist sets 5 to limit bookings per day.
Display Order	Controls which appointment types show up first on your booking page. Lower numbers appear first (e.g., 1, 2, 3).	"Consultation" = 1, "Follow-up" = 2

📋 3. Booking Form Requirements

This controls what information customers must give before confirming an appointment. You'll find this under the dropdown **"Booking Form Requirements."**

Typical Fields You Can Add:

Field	Why It's Useful
Full Name	So you know who booked.
Phone Number / Email	To confirm or contact them.
Reason for Appointment	To prepare before they arrive.

🟢 *You can mark some fields as required, and leave others optional.*

🪜 4. How to Create the Appointment Type (Step-by-Step)

1. Click **Create Appointment Type**
2. Fill in **Name**, **Description**, **Duration**, and **Price** (in relevant currency).
3. Pick a **Color** and toggle **Active** ON.
4. (Optional) Click **Advanced Settings** and add any buffer or limit settings.
5. (Optional) Expand **Booking Form Requirements** to choose what info you need from customers.
6. Click **Create** to save your service — or **Create & Create Another** to add more.

💡 **Quick Reminders**

- Keep **service names short and clear.**
- Always use **currency abbreviation (eg. USD)** for prices so customers know the currency.
- If you pause a service temporarily, just toggle **Active OFF** — you don't have to delete it.
- Use **colour coding** to keep your calendar easy to read (e.g., Blue = Consultations, Pink = Beauty, Green = Deliveries).

🌍 How to Configure Your Booking Page

Your **Booking Page** is where clients or customers can book appointments or sessions with you online.
Follow these steps to set up your booking page in WhizzIQ.

🔗 1. Your Booking Page Link

- Once your page is live, you'll see a personal booking link that looks like: https://whizziq.com/book/yourbusinessname
- Click **Copy** to share it on WhatsApp, Instagram, your website, or email.
- Click **View Booking Page** to preview how it looks to your clients.

🟢 *Tip:* Keep your link short and professional — it helps clients trust your brand.

⚙️ 2. General Settings

Setting	What It Does	Example
Enable Public Booking	Turns your page "ON" for customers to start booking. Switch it off to pause bookings.	✅ On (Active)
Display Name	The name clients will see on your booking page. This can be your business or your personal brand.	"Glow Studio," "Dr. Karen Health Centre," or "Mr. Singh's Auto Repair."
Booking Page URL	The customizable part of your link (end of the URL). Use something short and clear.	whizziq.com/book/glowstudio
Brand Color	Sets the color theme for your booking page. You can use your brand's color code (e.g., #FF69B4 for pink).	#3B82F6 (Blue)
Welcome Message	A friendly note shown at the top of your booking page. Use it to thank customers and confirm what happens next.	"Thank you for booking with us! We look forward to serving you."

🟢 *Tip:* Keep your message warm, short, and confident. It builds trust.

🕓 3. Availability Settings

These settings control when and how clients can book with you.

Field	Description	Example
Timezone	Select your local timezone so appointments show the correct local time.	"GMT-5 (Jamaica)", "GMT+1 (UK)", "GMT+8 (Singapore)"
Minimum Booking Notice (hours)	How far in advance people must book. Prevents same-day rush bookings.	24 = must book at least one day ahead

Maximum Booking Window (days)	How far into the future clients can book.	60 = bookings allowed up to 2 months in advance
Require Approval	If ON, you must manually approve each booking before it's confirmed.	Use for high-demand professionals or private sessions.

🟢 *Tip:* For salons and shops — keep "Require Approval" **off** for automatic confirmations. For doctors or consultants — turn it **on** to control your schedule manually.

💻 4. Meeting Platform (For Online Sessions)

If you offer online services (e.g., telehealth, tutoring, coaching), you can auto-generate meeting links.

Option	**What Happens**
No Online Meeting	For in-person or phone appointments.
Zoom / Google Meet (if integrated)	Automatically creates a private video link for each booking.

🟢 *Tip:* Choose this if you work with clients internationally or provide digital consultations.

📅 5. Calendar Sync

Keep your WhizzIQ bookings in sync with your personal or business calendar.

Integration	**Purpose**
Google Calendar	Syncs appointments to your Google Calendar so you don't double-book.
Microsoft Outlook / iCal *(coming soon)*	Will allow cross-platform scheduling sync.

❌ *If it shows "Not Connected,"* click "Connect" and sign into your calendar to activate sync.

🎥 6. Zoom Connection

If you use Zoom for virtual sessions:

- Click **Connect Zoom Account** to link your Zoom profile.
- WhizzIQ will then automatically create Zoom links for every online appointment.

🔒 *Note:* Each user (doctor, tutor, stylist) must connect their own Zoom account for security.

🧭 7. Next Steps

Once your booking page is set up:

1. **Create Appointment Types** → Add your services (consultations, lessons, sessions, etc.).
2. **Set Your Availability** → Define your working hours (coming soon feature).
3. **Test Your Booking Page** → Try booking a test appointment before sharing your link.

🌟 **Example Scenarios**

User Type	Display Name	Welcome Message	Platform	Booking Rule
Doctor / Therapist	“Dr. Alicia Wellness Centre”	“We look forward to supporting your health goals.”	Zoom (Online)	24-hour notice, approval required
Hairdresser / Barber	“Fade & Flow Studio”	“Your next look starts here — see you soon!”	In-person	Auto-confirm, 2-hour notice
Teacher / Tutor	“Learn Smart Academy”	“Book your one-on-one session below.”	Google Meet	12-hour notice, no approval
Farmer / Vendor	“Sunny Hill Produce”	“Reserve your pickup slot for fresh produce.”	No online meeting	Auto-confirm
Business Consultant / Coach	“NextLevel Strategy”	“Thank you for booking your strategy call.”	Zoom	48-hour notice, approval required

🗓️ How to Create an Availability Exception

Use this feature to **block off time when you are unavailable** — such as vacations, holidays, training days, personal leave, or maintenance breaks.
WhizzIQ will automatically stop customers from booking during these periods.

🧩 1. Exception Details

Field	What It Means	Example
Title	The name of your unavailable period. Choose something clear so you can recognize it later.	"Summer Vacation", "Clinic Closed for Public Holiday", "Equipment Maintenance", "Out of Town for Workshop", "School Mid-Term Break"
Description	Optional notes explaining why you're unavailable.	"Office closed for annual training." or "Hairdresser attending industry expo."

🕓 2. Type

Choose the **type of exception** that best fits your situation.

When you need to block time from your WhizzIQ booking calendar, select the **Type** that best fits the reason you're unavailable.
This helps your clients know why bookings are not open during that period — and keeps your schedule organized.

⛱️ Vacation

Use this when you are away from work for rest, travel, or planned time off.
Examples:

- "Summer Break" for teachers or schools.
- "Annual Leave" for doctors or office staff.
- "Family Trip" for salon or business owners.
- "Farm Closed for Rest Period" for agricultural users.

🟢 *Tip:* Turn on **All Day Exception** to block the full range of dates you'll be away.

🎉 Holiday

For public holidays, religious observances, or regional celebrations when your business is closed.
Examples:

- "New Year's Day"
- "Eid al-Fitr"
- "Christmas Day"
- "National Independence Holiday"

🟢 *Tip:* These can be added once and reused yearly by adjusting the dates each year.

🤒 **Sick Leave**
Use this when you're unwell or unable to attend work unexpectedly.
Examples:

- "Flu Recovery"
- "Medical Leave"
- "Doctor's Orders — No Bookings"

🟢 *Tip:* Mark this as an **All Day Exception** if you need complete rest, or use a **Start and End Time** if you're out for only part of the day.

🧘🏾‍♀️ **Personal Time**
Reserved for errands, rest, or any private activity that isn't a formal holiday or leave.
Examples:

- "Errands and Family Time"
- "Self-Care Afternoon"
- "Personal Appointment"
- "School Visit for Child"

🟢 *Tip:* Great for freelancers and entrepreneurs — you can block just a few hours or an entire day.

🧩 **Other**
Use this for any situation that doesn't fit the above categories. You can explain it in the **Description** box.
Examples:

- "Maintenance and Cleaning"
- "Power Outage / System Downtime"
- "Team Training Workshop"
- "Community Event"

🟢 *Tip:* Always include a short note in the **Description** so you remember what the block was for later.

🌟 Quick Example Scenarios

User Type	Type	Title	Duration	Description
Doctor	Sick Leave	“Flu Recovery”	2 days	Cancel all appointments while recovering
Salon Owner	Vacation	“Team Retreat”	1 week	Salon closed for staff rest
Teacher	Holiday	“Mid-Term Break”	5 days	School closed
Farmer	Other	“Tractor Repairs”	3 days	No produce pickup during repairs
Freelancer	Personal Time	“Family Event”	1 day	Out of office

📅 3. Start and End Dates

Field	What It Does	Example
Start Date	The first day (or time) you will be unavailable.	Start Date: July 15, 2025
End Date	The last day (or time) you will be unavailable.	End Date: July 20, 2025

🟢 *Tip:* You must fill in both — WhizzIQ will automatically block the full period between them.

🌙 4. All Day Exception (Toggle)

Turn this **ON** if you want to block the **entire day(s)**, not just a time window.

When to Use	Example
Full-day closures	“Public Holiday”, “Clinic Renovation”, “Family Trip”
Partial days	Keep OFF, and specify hours instead (e.g., 9 AM – 12 PM).

🪜 5. How to Create an Exception

1. Click **Create Availability Exception.**
2. Enter a **Title** (e.g., *Vacation*, *Workshop*).
3. Add an optional **Description** for reference.
4. Select **Type** (Time-based or Date-based).
5. Choose your **Start Date** and **End Date.**
6. Turn on **All Day Exception** if you want full-day blocking.
7. Click **Create** to save or **Create & Create Another** if you want to add multiple exceptions.

🌟 Examples for Different Users

User Type	Example Title	Type	Start / End	Notes
Doctor / Clinic	"Medical Conference – No Appointments"	Date-Based	May 12–15	Attending conference overseas
Hairdresser / Salon	"Stylist Off – Personal Day"	Time-Based	June 10 (All Day)	Staff leave
Teacher / Tutor	"Exam Marking Week"	Date-Based	Aug 2–6	No lessons this week
Farmer / Vendor	"Market Closed – Equipment Repairs"	Date-Based	Sept 1–3	Temporary closure
Corporate / Consultant	"Client Offsite Project"	Time-Based	Every Thursday 9 AM–2 PM	Reserved for field work

💡 Tips for Smooth Scheduling

- Add all holidays or known breaks early so clients can see accurate availability.
- Keep exceptions descriptive — helps you stay organized later.
- Combine exceptions with your **default working hours** to create a clear, professional calendar.
- If you share a business account, make sure all team members enter their own exceptions.

📋 Upcoming Appointments – User Guide

This page lists **all scheduled appointments that are confirmed but not yet completed**.
It helps you (or your staff) keep track of what's coming up next and who each appointment is with.

🧩 1. What You're Seeing

Each row shows one upcoming appointment with key details:

Column	What It Means	Example
Status	Shows whether the appointment is *Confirmed*, *Pending*, *Cancelled*, or *Completed*.	🟢 **Confirmed** means it's booked and ready.
Title	The name of the appointment — includes both the service and the assigned staff member.	"Follow-Up Visit with Dr. Lewis" or "Hair Styling with Kimora."
Type	The category or service type that was booked.	"Follow-Up Visit," "Consultation," "Private Lesson," "Nail Design."
Date & Time	When the appointment will take place. The duration is also shown underneath.	"Nov 12, 2025, 4:00 PM — 30 min."
Location	Where the session will happen (if specified).	"Zoom," "Office Room 3," "Home Service," or "—" if none added.

🔍 2. Managing and Tracking Appointments

Task	What to Do	Why It Matters
✅ **Check Status**	Look for green "Confirmed" labels to know which bookings are ready.	Ensures you're aware of confirmed clients.
📆 **Monitor Dates & Times**	Scan upcoming times daily or sort them by date.	Keeps your team or schedule organized.
🔎 **Search or Filter**	Use the **Search bar** or **Filter icon** (top right) to find appointments by name, service, or date.	Great for busy schedules or large teams.

🕓 3. Understanding Appointment Status

Status	Meaning	Example Use Case
🟢 **Confirmed**	Appointment is approved and scheduled.	The client booked online and received confirmation.

🌎 4. Global Use Examples

Industry	Example Entry	How to Use This View
Medical / Clinic	"Follow-Up Visit with Dr. Patel" – Confirmed	Track upcoming patients and durations.
Salon / Spa	"Hair Coloring with Amanda" – Confirmed	View all clients scheduled for the day.
Education / Tutoring	"Math Lesson with Mr. Kim" – Confirmed	Keep student sessions organized.

Agriculture / Farming	“Crop Inspection with Client X” – Confirmed	Manage field visit times.
Corporate / Consulting	“Strategy Call with Client ABC” – Confirmed	Stay on top of client meetings.

⚡ 5. Quick Tips for Users

- **Check this list daily** to stay prepared for all upcoming appointments.
- Use the **Search Bar** to quickly find a name or session type.
- Click on a booking (if enabled) to **view details or make changes**.
- If a booking is missing, confirm that the client completed the booking form.
- Use **filters** to view by staff member, service type, or confirmation status.

💼 Pro Tip (For Teams)

If your business has multiple staff members, each user will only see the appointments **assigned to them** — keeping your team’s schedule clean and easy to manage.

ANALYTICS DATA

FINANCE

💼 How to Import Your Financial Data in WhizzIQ

WhizzIQ allows you to connect your accounting tools or upload Excel files so you can instantly view your **revenue, expenses, and profit margins** — all in one place.

📊 Your Financial Overview
At the top of the page, you'll see live summaries of your business performance:

Box	What It Shows
Total Revenue	The total amount your business earned this month. The green arrow shows how it compares to last month.
Total Expenses	Your total costs or outflows for this month. A decrease means improved cost control.
Profit Margin	The percentage of profit after expenses. Higher is better!
Connected Platforms	How many data sources you've linked (e.g., QuickBooks, Excel, Stripe).

💡 *Tip:* These figures update automatically once you import or sync data.

🔗 Step 1: Connect Your Financial Platforms
WhizzIQ supports several accounting and finance tools. Choose the one that matches your business setup.

Platform	Description	Action
QuickBooks	For businesses using QuickBooks Online.	Click **"Connect QuickBooks"** and sign in to authorize WhizzIQ to read your data.
Xero	For users managing finances in Xero.	Click **"Connect Xero"** and approve the one-time sync.
Excel / CSV	For businesses tracking finances manually in spreadsheets.	Click **"Upload File"** to import your Excel or CSV file.
Stripe	For businesses receiving online payments.	Click **"Connect Stripe"** to automatically pull in payment data.
Oracle Financials *(Enterprise)*	For large organizations with ERP systems.	Click **"Contact for Oracle Financials"** to request setup.
SAP *(Enterprise)*	For enterprise-grade accounting.	Click **"Contact for SAP"** to begin integration.

🟢 *All connections are encrypted and read-only — your financial data remains secure.*

⚙️ Step 2: Import Your Data

After connecting your preferred platform:

1. Click **"Import Data Now"** (if prompted).
2. WhizzIQ will automatically fetch your **revenue**, **expenses**, and **cash flow** data.
3. Once imported, your dashboard metrics will update instantly.

🗂️ Step 3: Upload Excel or CSV Manually (If You Don't Use an Integration)

If you manage finances in Excel or Google Sheets:

1. Click the **"Upload File"** button under *Excel / CSV*.
2. Use the correct file format:
3. Date,Description,Amount,Type,Category
4. 2025-05-15,Medical Supplies Purchase,1500.00,expense,medical_supplies
5. 2025-05-20,Patient Payment,5000.00,revenue,consultations
6. Upload your file. WhizzIQ will read and categorize each transaction automatically.
7. You'll see totals reflected in your dashboard within seconds.

💡 *Supported formats: .xlsx, .xls, .csv*

🔐 Step 4: Data Security and Access

WhizzIQ only has **read-only** access to your data. That means:

- No edits or withdrawals are made from your accounting software.
- All information is encrypted end-to-end.
- Only you and authorized users can view imported data.

📘 How Financial Import Works (Recap)

1. **Click "Connect"** → Choose your platform (QuickBooks, Xero, Stripe, or Excel).
2. **Authorize Access** → Log in once to allow secure import.
3. **Import Data** → WhizzIQ fetches and organizes your financial data automatically.
4. **View Insights** → Instantly see updated revenue, expenses, and profit margin on your dashboard.

🌟 Example Use Cases

User Type	How to Use Import Feature
Doctors / Clinics	Upload Excel data of patient payments and supplier expenses monthly.
Small Businesses	Connect QuickBooks or Xero for automatic daily updates.
Freelancers	Import Stripe or PayPal transactions for income tracking.
Schools / Institutions	Upload CSV reports for tuition payments and operational expenses.
Enterprise Teams	Integrate Oracle or SAP for unified, organization-wide reporting.

📤 Upload Excel or CSV File – User Guide

Easily upload your financial data from **Excel (.xlsx, .xls)** or **CSV (.csv)** files.
WhizzIQ will automatically process your file and update your **revenue, expenses, and cash flow** dashboard.

🧾 Step 1: Prepare Your File

Before uploading, make sure your spreadsheet includes these required columns:

Required Column	Description	Example
Date	The date of the transaction (any common format works, e.g., YYYY-MM-DD or DD/MM/YYYY).	2025-07-05
Description	A short text explaining the transaction.	"Purchase of medical supplies"
Amount	The transaction value (can include decimals or commas).	1250.50
Type	Defines if it's an **expense**, **revenue**, **income**, or **sale**.	expense
Category *(optional)*	Helps group similar transactions.	utilities, salaries, lab_fees

💡 *Tip:* If your file doesn't have a "Category" column, WhizzIQ will automatically group similar transactions for you.

🧩 Step 2: Choose Your File

1. Click **Browse** or **Drag & Drop** your file into the upload box.
2. Make sure your file type matches one of the supported formats below:

Supported Format	Details
Excel (.xlsx, .xls)	Standard Excel files from any version of Microsoft Excel or Google Sheets.
CSV (.csv)	Files using commas (,) or semicolons (;) as separators.
Max File Size:	10 MB (approximately 50,000 transactions).

🟢 *Tip:* If your file is too large, split it into smaller monthly or quarterly uploads.

📋 Step 3: Verify File Structure

After selecting your file, double-check that all required columns are recognized:

- ✅ **Date**
- ✅ **Description**
- ✅ **Amount**
- ✅ **Type (Revenue/Expense)**
- ✅ **Category (optional)**

WhizzIQ will automatically validate your file before uploading and highlight any missing fields.

🧠 Step 4: (Optional) Download a Template

If you're unsure how to format your data:

- Click **"Download Sample CSV"** to get a pre-filled example.
- Open it in Excel or Google Sheets and replace the sample entries with your own.

This ensures your upload meets WhizzIQ's expected structure.

🚀 Step 5: Upload and Import

1. Once your file is ready, click **Upload & Import**.
2. WhizzIQ will process the data and update your financial dashboard automatically.
3. You'll see:
   - ✅ **Revenue** totals
   - 💸 **Expenses** summaries
   - 📊 **Profit margin** updates

If an error occurs, WhizzIQ will notify you which column or row needs adjustment.

🔐 Step 6: Data Security

- Your uploaded file is **encrypted** and processed securely.
- WhizzIQ has **read-only access** — it never modifies or shares your data.
- You can delete uploaded files anytime from your account.

🌟 Example Use Cases

User Type	File Example	What They Track
Doctors / Clinics	Doctor_Office_Transactions_May_to_October_2025.xlsx	Revenue from patient visits, lab fees, staff salaries.
Small Businesses	Business_Expenses_Q3.csv	Income from sales, operating costs, and subscriptions.
Freelancers / Coaches	Income_Tracker.csv	Session fees, marketing spend, platform subscriptions.
Schools / Institutions	School_Accounts_July.csv	Tuition income, facility costs, staff payroll.

🪜 In Short

1. Prepare your file → include Date, Description, Amount, Type, (Category optional).
2. Drag & drop or click **Browse** to upload.
3. Review columns → Download a sample if needed.
4. Click **Upload & Import** → Data appears in your WhizzIQ dashboard.

EXPENSES

💸 Create Expense – User Guide

Use this page to record any business expense quickly and accurately.
You can enter daily costs, supplier payments, or operational spending — and even tag items as **tax deductible**.

🧾 1. Expense Details

This section captures the key details about each expense.

Field	Description	Example
Date	The date the expense was paid or incurred.	28/10/2025
Amount	The total cost of the expense. You can include decimals or currency symbols.	250.75
Category	The main type of expense. WhizzIQ's AI can auto-suggest based on your description.	Office Rent, Utilities, Medical Supplies, Internet Service, Advertising
Description	A short note explaining what the expense is for.	"Payment for October office rent" or "Purchased lab test reagents."

💡 *Tip:* Adding a clear description helps WhizzIQ automatically classify expenses into the correct category for reporting.

🧮 2. Tax Information

Option	Description	Example Use
Tax Deductible (Toggle)	Turn this ON if this expense can be deducted when filing taxes.	Office rent, medical supplies, electricity bills, and insurance premiums are usually tax deductible.

🟢 *Why it matters:* Marking tax-deductible expenses helps generate accurate reports for accountants or year-end filing.

⚙️ 3. Actions

Button	What It Does	When to Use
Create	Saves this expense and returns you to your main list.	Use when you're done adding a single record.
Create & Create Another	Saves the current expense and opens a new blank form immediately.	Ideal when entering multiple expenses at once.
Cancel	Discards the form without saving.	Use if you clicked this page by mistake or want to exit.

🧠 4. Example Scenarios

User Type	Example Entry	Amount	Category	Tax Deductible
Doctor / Clinic	"Lab reagents for patient testing"	12,500	Medical Supplies	✅
Salon / Spa	"Purchase of hair coloring kits"	6,800	Beauty Products	✅
Freelancer / Consultant	"Zoom Pro subscription"	40	Subscriptions	✅
School / Tutor	"Printing exam papers"	300	Office Supplies	✅
Farmer / Vendor	"Fuel for delivery van"	1,100	Transport	✅

🔐 5. Best Practices

- Enter expenses as soon as they occur — don't wait until month-end.
- Use **consistent categories** (e.g., always "Medical Supplies," not "Supplies/Med").
- Mark only legitimate business-related expenses as **Tax Deductible**.
- Check your expense list weekly to ensure accuracy in monthly summaries.
- WhizzIQ automatically includes these expenses in your financial dashboards.

🪜 Quick Summary

1. **Add Date & Amount** → when and how much was spent.
2. **Enter Category** → choose or let AI suggest.
3. **Describe It** → a short note for context.
4. **Mark Tax Deductible (if applicable).**
5. Click **Create** → your expense is now saved and visible in your reports.

📥 Import CSV or Excel File – User Guide

This screen lets you upload your financial data into WhizzIQ from Excel (.xlsx, .xls) or CSV (.csv) files.
To ensure your file uploads successfully, it **must follow the required format exactly** — especially for the **date column**.

⚙️ Step 1: Prepare Your File

Your file **must include the following columns in this exact order**:

Column	Required	Description	Example
Date	✅	The date of the transaction. You can use any of these formats: • YYYY-MM-DD → 2025-05-15 (recommended) • DD/MM/YYYY → 15/05/2025 • MM/DD/YYYY → 05/15/2025	✅ *All of these work — just stay consistent throughout your file.*
Description	✅	Short text explaining the transaction.	Office Supplies Purchase, Patient Payment, Electricity Bill
Amount	✅	The transaction amount. Use numbers only (with or without commas or decimals).	250.50, 1,250, or $3,000
Type	✅	Defines whether it's an **expense**, **revenue**, **income**, or **sales** entry.	expense, revenue, income or sale
Category	Optional	The classification of the transaction. If left blank, WhizzIQ will automatically assign one.	utilities, sales, medical_supplies, rent

💡 *Columns must be named exactly as shown above (case-insensitive).*

📘 Step 2: Example of a Correct File

Below is how your file should look when opened in Excel or Google Sheets:

Date	Description	Amount	Type	Category
2025-01-15	Office Supplies	250.50	expense	supplies
2025-01-16	Client Payment	5000	revenue	sales
2025-02-02	Medical Equipment Lease	3200	expense	equipment
2025-02-05	Lab Fees Income	7800	revenue	diagnostics

✅ **Notice:**

- Dates follow one consistent format (e.g., YYYY-MM-DD).
- Amounts are numeric — no text or mixed symbols.
- Every row has a valid **Type** (expense or revenue).
- Category is optional.

📁 Step 3: Supported File Types

File Type	Notes
Excel (.xlsx, .xls)	Works best for structured data — one sheet only.
CSV (.csv)	Use commas (,) or semicolons (;) to separate columns.
Maximum File Size:	10 MB (around 50,000 rows).

🧩 Step 4: How to Upload

1. Click **Browse** or **Drag & Drop** your file into the upload area.
2. Review the displayed file name to confirm it's correct.
3. Click **Submit** to begin importing.
4. WhizzIQ will automatically validate your data and display any format errors before importing.

🚫 Common Errors to Avoid

Issue	Cause	Solution
❌ Wrong Date Format	Mixed formats (e.g., 15/05/2025 and 05/16/2025)	Pick one format and use it for all rows.
❌ Missing Required Column	Columns like "Amount" or "Type" are missing.	Add them exactly as listed above.
❌ Invalid Characters	Letters in Amount field (e.g., "USD 500").	Remove all text from numeric fields.
❌ Wrong Column Order	"Type" or "Amount" swapped positions.	Use the exact order: Date, Description, Amount, Type, Category.
❌ Incorrect File Type	File saved as .numbers or .pdf.	Export or save as .xlsx or .csv.

📄 Step 5: Need Help Formatting?

Click **Download Sample File** or copy this example below:

Date,Description,Amount,Type,Category
2025-01-15,Office Supplies,250.50,expense,supplies
2025-01-16,Client Payment,5000,revenue,sales
2025-02-10,Staff Salary,12500,expense,salaries
2025-02-12,Lab Test Income,8900,revenue,diagnostics

💡 *You can edit this sample file in Excel or Google Sheets and re-upload it.*

🔐 Data Security Notice

Your uploaded files are encrypted and used **only** to import financial data.
WhizzIQ never modifies or shares your information — all imports are **read-only and secure**.

✅ Final Steps

1. Double-check your date format before uploading.
2. Ensure all required columns are present.
3. Upload your file and click **Submit**.
4. Once uploaded, your transactions will appear in your dashboard instantly.

REVENUE SOURCES

💰 Create Revenue Source – User Guide

Use this section to record any **income or earnings** your business receives — whether from product sales, services, contracts, grants, or other streams. WhizzIQ will track and visualize all revenue automatically once entered.

🧾 1. Revenue Details

Field	Description	Example
Date	The date when the payment was received or recorded.	29/10/2025
Amount	The total amount earned. You can include decimals or commas depending on your region.	15000, 12,500.75
Source	The specific source of the income. Be clear so you can distinguish later between multiple streams.	Patient Consultations, Product Sales, Grant Funding, Subscription Fees
Percentage *(optional)*	The percentage of this revenue compared to your total income. If unsure, you may leave it blank — WhizzIQ calculates totals automatically.	20, 35.5
Description	Add any useful notes about the transaction, such as client name, payment method, or recurring details.	Received payment from HealthCare Plus for October visits.

💡 *Tip:* Entering detailed sources helps generate more accurate insights into which activities or services contribute most to your revenue.

⚙️ 2. Actions

Button	What It Does	When to Use
Create	Saves the revenue record and takes you back to your list.	Use this when adding a single entry.
Create & Create Another	Saves the current record and opens a new blank form.	Use when adding several sources at once.
Cancel	Discards the entry and returns to the main revenue list.	Use if you change your mind or opened this screen accidentally.

📊 3. Example Use Cases

Business Type	Example Entry	Amount	Source	Description
Doctor's Office	Patient Consultations	25,000	Services	Monthly consultation payments.
Salon / Spa	Product Sales	8,500	Retail	Sale of treatment kits and oils.
Freelancer / Consultant	Consulting Retainer	1,200	Contract	October retainer payment.
School / Tutor	Term Tuition Fees	300,000	Education	Tuition received for Term 2.
Farmer / Vendor	Market Stall Sales	9,800	Sales	Produce sold at Saturday Market.

🧠 4. Best Practices

- Record revenue **as soon as payments are received** for better cash flow tracking.
- Use **consistent source names** (e.g., always "Patient Consultations," not "Consulting/Patients").
- If you track percentages, ensure they sum up to roughly 100% of total income for reporting accuracy.
- WhizzIQ will automatically display your total revenue, trends, and top income streams in your financial dashboard.

✅ Quick Summary

1. Enter **Date** and **Amount** of income.
2. Specify the **Source** clearly (e.g., "Product Sales," "Consulting").
3. Add an optional **Percentage** if you want to track revenue share.
4. Include a **Description** for additional context.
5. Click **Create** — your revenue source is now saved and visible on your dashboard.

💡 Revenue Sources (for Import Uploads)

For revenue sources, the same upload steps apply as for expenses. However, it is important to note that if any rows in your imported file are labeled **"revenue"** or **"income"** in the **Type** column, they will be **automatically categorized under the Revenue section** of your WhizzIQ dashboard. You do not need to separate or manually assign these entries — the system will recognize and organize them automatically upon import.

MARKETING METRICS

📊 User Guide: Create Marketing Metric

The **Create Marketing Metric** section allows you to connect your digital advertising accounts (e.g., Meta, Google, LinkedIn, TikTok, X/Twitter, Pinterest) so you can automatically import and track performance metrics in one place.
Once connected, your campaign data — such as impressions, clicks, conversions, and ROI — will sync to your dashboard for reporting and analysis.

🚀 Purpose

This feature eliminates the need to manually export reports from multiple ad platforms. By linking your accounts, you can:

- View cross-platform campaign performance in one dashboard.
- Track KPIs like cost per lead, conversion rate, and total spend.
- Simplify ROI reporting and monthly marketing summaries.

⚙️ Step-by-Step Setup Guide

Step 1: Choose a Platform to Connect

Select one or more advertising platforms that your business uses.
Each platform card shows the ad type it supports.

Platform	What It Covers	Action Button
Meta Ads Manager	Facebook & Instagram Ads	🔵 Connect Meta Ads Manager
Google Ads	Search, Display & YouTube Ads	🟩 Connect Google Ads
LinkedIn Ads	B2B Professional Advertising	🟦 Connect LinkedIn Ads
TikTok Ads	Short-Form Video Campaigns	🔴 Connect TikTok Ads
X (Twitter) Ads	Social Media & Engagement Campaigns	⚪ Connect X (Twitter) Ads
Pinterest Ads	Visual Discovery & Product Ads	🟨 Connect Pinterest Ads

📌 **Tip:**

You can connect multiple platforms at once. Each connection is a one-time authorization that enables automatic data import.

Step 2: Authorize Your Account

After clicking **Connect**, a secure pop-up will appear.
You'll be asked to sign in and grant permission for the app to access your advertising account metrics.
This authorization allows the system to:

- Read your campaign data (spend, reach, clicks, conversions).
- Sync updates automatically.
- Display summarized analytics within your dashboard.

✅ **Your login credentials are never stored** — the connection uses secure API authorization (OAuth).

Step 3: Import Marketing Data
Once your account is connected, click **"Import Latest Data."**
The system will automatically fetch your most recent campaign data, including:

- Campaign names and dates
- Impressions and clicks
- Cost-per-click (CPC)
- Conversion metrics
- Return on ad spend (ROAS)

This data will populate your marketing dashboard for easy visualization and trend analysis.

🧮 How It Works (Summary Box)

As outlined at the bottom of the screen:

1. **Click "Connect"** on any platform and authorize access to your ad account.
2. **Click "Import Latest Data"** to pull in your campaign results.
3. **Your data is ready** for analysis and comparison within your dashboard.

🔹 **Note:**
This is a *one-time setup.* Once connected, you can import fresh data anytime with a single click — no need to reconnect.

🧠 Understanding the Metrics You'll Get

After import, your marketing dashboard will show key metrics

📦 Example Use Case

Let's say you manage ads on Facebook, Google, and TikTok:

1. Click **Connect Meta Ads Manager**, **Connect Google Ads**, and **Connect TikTok Ads**.
2. Authorize each platform when prompted.
3. Click **Import Latest Data** to sync your metrics.
4. View all campaign data together in your marketing dashboard — allowing you to compare ad efficiency and ROI across platforms.

🔐 Data Privacy and Security

- All connections use **encrypted tokens** (OAuth 2.0).
- Your login details are **never saved** by the system.
- You can revoke access anytime via the platform's security settings.

⚠️ Common Setup Issues

Issue	Possible Cause	Solution
Connection fails	Ad account permissions not granted	Reconnect and ensure the user has admin access
Data not importing	API limits or expired token	Reauthorize the platform connection
Metrics incomplete	Campaign filters applied	Check active date ranges and campaign status
Duplicate entries	Re-importing without refresh	Use "Import Latest Data" only once per cycle

💡 Pro Tips

- Connect all ad platforms for a unified performance view.
- Refresh metrics weekly for the most accurate trend analysis.
- Use imported data to create automated marketing performance reports.
- Combine marketing metrics with sales data for full ROI tracking.

✅ Quick Summary

Step	Action
1	Click “Connect” under your chosen advertising platform(s).
2	Authorize access to your ad accounts.
3	Click “Import Latest Data” to pull in campaign metrics.
4	View all your advertising data in one dashboard.

PRODUCTIVITY

🎯 How to Create a Goal

The **Create Goal** page helps you define your main business objective and set measurable outcomes to track your progress.
Each goal is made up of **two parts**:

1. **Goal Information** – what you want to achieve.
2. **Key Results** – how you will measure your success.

🧩 1. Goal Information (Left Side)

This section defines your main objective.

Field	What It Means	Example
Goal Title	The main objective you want to achieve. Keep it specific and clear.	“Increase Monthly Revenue by 20%” or “Improve Patient Satisfaction.”
Description	A short note describing *why* this goal matters and what success looks like.	“This goal aims to improve overall profitability through better service quality and retention.”
Goal Period	The timeframe for this goal. You can set it as Monthly, Quarterly, or Annual.	“Quarterly Goal (3 months).”
Category	The area this goal belongs to (e.g., Finance, Operations, Growth, HR).	“Finance” or “Customer Experience.”
Start Date	When you want to begin tracking this goal.	“29/10/2025.”
Target Date	The deadline by which you plan to achieve it.	“31/01/2026.”

🟢 **Tip:** Choose a realistic time frame—quarterly goals are ideal for most small businesses or clinics.

📊 2. Key Results (Right Side)

This section breaks your goal into measurable, trackable outcomes.
These are the *specific metrics* you’ll monitor to know if you’re on track.

Field	What It Means	Example
Key Result	A measurable target that shows progress toward your main goal.	“Increase total monthly bookings to 600.”
Metric Type	Choose how the progress is measured—by Number, Percentage, Currency, etc.	“Number” or “Currency.”
Unit	The label for what you’re measuring.	“patients,” “sales,” “appointments,” “USD.”

Starting Value	Where you are now (your current baseline).	"400" bookings.
Current Value	Your progress so far (you can update this later).	"480" bookings.
Target Value	Your goal or end result.	"600" bookings.

🟢 **Tip:** Use 2–4 key results per goal.
Too many make it hard to stay focused; too few make progress unclear.

➕ Adding Multiple Key Results

Click **"Add Key Result"** to include more measurable targets for the same goal.
For example:

- **Key Result 1:** Increase monthly patient visits to 600.
- **Key Result 2:** Reduce average waiting time to under 20 minutes.
- **Key Result 3:** Raise satisfaction score to 90%.

✅ 3. Saving Your Goal

Once you've entered all the information:

- Click **Create** to save and track this goal.
- Click **Create & Create Another** to immediately start a new one.
- Click **Cancel** if you want to discard this goal.

🌟 Example Goals

Goal Title	Description	Example Key Results
Increase Clinic Revenue	Grow earnings by offering new services and improving patient retention.	(1) Increase monthly revenue from $100K to $130K. (2) Grow lab test orders by 20%. (3) Reduce missed appointments by 15%.
Enhance Customer Experience	Improve patient satisfaction and reduce complaints.	(1) Raise satisfaction score from 75% to 90%. (2) Reduce average waiting time from 40 to 25 minutes.
Expand Team Skills	Strengthen staff knowledge and efficiency.	(1) Conduct 4 staff workshops. (2) Improve documentation accuracy to 98%.
Launch New Service Line	Introduce preventative care programs to attract new patients.	(1) Enroll 200 patients by end of quarter. (2) Achieve 85% satisfaction in program feedback.

🧾 User Guide: Create Task

The **Create Task** page allows you to record and organize activities tied to your goals and documents.
Each task includes details about *what needs to be done, when, and by whom* — helping you stay on top of daily, weekly, or long-term actions.

🔷 **Section 1: Task Details**

Task Title
Enter the main action or activity you want to complete.
✅ *Example:* "Follow up with client about proposal" or "Call patients to confirm appointments."

Description
Add additional context or instructions related to the task.
✅ *Example:* "Confirm proposal timeline and gather feedback before next meeting."

Priority
This dropdown defines how urgent or important the task is.
Available options:

- **Urgent** – Must be done immediately or by the end of the day.
- **High** – Critical for achieving a goal within the week.
- **Medium** – Standard task to be completed within normal timelines.
- **Low** – Non-urgent or routine task.

✅ *Example:* "Set to High for financial reporting or patient emergencies."

Status
Use this dropdown to track task progress.
Available options:

- **Pending** – Task not yet started.
- **In Progress** – Work is currently being done.
- **Completed** – Task is finished.
- **Cancelled** – Task was voided or no longer needed.

✅ *Example:*
"Set to In Progress once you've started working on it."

Estimated Time (minutes)
Enter how long the task is expected to take.
✅ *Example:* "30" for short calls, "120" for reports, or "240" for major tasks.

Due Date
Pick the deadline for completing the task.
This helps ensure tasks are visible in dashboards and reminders.
✅ *Example:* "Select 30/10/2025 if due at the end of the month."

Tags
Use tags to group or filter related tasks across your dashboard.

- To add a tag, click inside the **Tags** field.
- Choose from existing tags in the dropdown **or create a new one**.
- To create a new tag:
    1. Click the **"+"** icon (as shown in the image).
    2. Enter the **Tag Name** (e.g., "Finance," "Marketing," "Follow-Up").
    3. Select a **Color** for easy identification.
    4. Click **Create**.

✅ *Example:* "Create a tag named 'Quarterly Review' in Blue."

🔷 Section 2: Linking & Context
This section connects the task to existing goals and documents in your workspace.

Link to Goal
If this task supports a specific goal (e.g., "Increase Monthly Revenue"), select that goal here.
🟡 *Note:* Goals must already exist in your **Goals** section before they appear in this dropdown.
✅ *Example:*
"Link to Goal → Boost Monthly Practice Revenue."

Link to Document
Attach a related file or document that supports this task (e.g., proposal, report, or dataset).
🟡 *Note:* Documents must already be uploaded in your **Documents** section before they appear in this dropdown.
✅ *Example:*
"Link to Document → Doctor_Office_Transactions_May_to_October_2025_with_Large_Expenses.xlsx."

Additional Notes
Use this field for important follow-ups, dependencies, or remarks.
✅ *Example:*
"Waiting on lab confirmation before sending the final report."

🔷 Section 3: Reminders
Click the **Reminders** section to set up notifications for upcoming tasks.
You can:

- Get reminders before the due date (e.g., 1 day or 1 hour before).
- Customize based on your workflow frequency.

✅ *Example:*
"Set a reminder for 9 AM on the due date for morning follow-up tasks."

🔷 Saving the Task
Once all fields are filled:

- Click **Create** to save.
- Click **Create & Create Another** to immediately add a new task.
- Click **Cancel** if you wish to discard.

💡 **Quick Tips**

- Always **link tasks** to goals and documents where possible — this improves performance tracking.
- Use **tags and colors** consistently to make filtering easier.
- Start with **Medium priority + Pending status** for most tasks, then adjust as you progress.
- The **estimated time** helps WhizzIQ calculate workload summaries across your team.

SECURITY

🔒 User Guide: Create Password

The **Create Password** screen allows you to securely store and manage your login credentials inside WhizzIQ.
All passwords are protected using **AES-256 encryption**, ensuring maximum data security for your business accounts.

🧩 1. Login Details

Field	Description	Example
Title / Name	A memorable title that helps you easily identify this login later.	"Clinic Email Login" or "AWS Hosting Dashboard"
Website URL	The exact website or service you use to log in.	https://mail.google.com or https://portal.aws.amazon.com
Category	Choose a category to organize your passwords (e.g., Admin, Finance, Marketing, Social Media).	"Finance" or "Admin Access"

💡 **Tip:** Always give each password entry a clear name so you can quickly find it in your vault.

🔑 2. Credentials

This section stores the actual login credentials that are encrypted in your vault.

Field	Description	Example
Username	The login username or account ID for the platform.	admin@clinicpro.com
Email Address	Optional field for the account's registered email (if different from the username).	finance@clinicpro.com
Password	The secure password for the account.	Z!oomMeet@2025$

🔐 Password Field Features

- 👁️ **Visibility Icon:** Click this to **show or hide** the password. Useful when double-checking entries.
- ❇️ **Auto-Generate Password Icon (Star):**
  This feature automatically **creates a strong, randomized password** for you.
  - It includes uppercase, lowercase, numbers, and symbols.
  - Click the ❇️ icon to instantly fill the password field with a newly generated one.
  - You can copy or reveal it to store elsewhere if needed.

✅ *Example:* Auto-generated password — H@9tM!wQ4p#K7vT

🟢 **Security Note:** All passwords are encrypted immediately after saving and are only visible to authorized users.

🗒️ 3. Additional Information

This section helps you record extra details that may assist with future logins or account recovery.

Field	Description	Example
Notes	Add recovery codes, MFA setup steps, billing reminders, or special instructions.	"2FA enabled with Google Authenticator. Backup code saved on clinic iPhone." "Password reset every 90 days per company policy."
Mark as Favorite	Toggle this switch on if the login is frequently used. Favorited passwords appear at the top of your vault for faster access.	✅ "Mark Gmail Admin Login as Favorite."

💡 Examples of Notes You Can Add

1. **With Two-Factor Authentication:**
   "MFA required — linked to clinic's iPhone Authenticator app."
2. **With Billing Details:**
   "Renewal billed monthly on the 25th — linked card ending 9823."
3. **With Recovery Info:**
   "Backup recovery link saved in Google Drive (Admin folder)."
4. **Shared Access Accounts:**
   "Used by HR and Admin only. Notify before password update."
5. **System Admin Accounts:**
   "Root access — requires VPN login first before connecting."

💾 4 Saving and Managing Passwords

Once all information is filled in:

- Click **Create** to save the current password.
- Click **Create & Create Another** to add more logins right away.
- Click **Cancel** to discard without saving.

🔐 Quick Tips

- Always use the ✳️ **Auto-Generate Password** tool to ensure password strength and uniqueness.
- Use **categories** for easy filtering (e.g., Admin, Finance, IT).
- Store **recovery notes** in the *Notes* section, not in the password field.
- Mark your most important logins as **Favorites** for quick access.

User Guide: Create Document

The **Create Document** page allows you to upload, organize, and manage important files within your **Document Vault**. This ensures that all business and operational documents are securely stored, easily searchable, and properly categorized.

1. Document Information

This section captures the essential details about each file you upload.

Document File

- **What to do:** Click **Browse** or drag and drop a file into the upload box.
- **Supported formats:** PDF, Word (.doc/.docx), Excel (.xls/.xlsx), PowerPoint (.ppt/.pptx), Text (.txt), and Images (.jpg/.png).
- **File size limit:** 10 MB per upload.
- **Tip:** Always use clear file names before uploading to make search and tagging easier.

Document Title

- Enter a short, descriptive title for your document.
- This title is what appears in your Document Vault listings and search results.
- **Example:**
  - "Clinic Registration Certificate 2025"
  - "Employee Contract – Dr. Jane Watson"
  - "Insurance Policy – MedSure 2025"

Category

- Use this dropdown to organize your files into logical groups.
- Categories make filtering and reporting easier later.

Description

- Provide a brief overview or context for the document.
- This helps others understand what the document is without needing to open it.
- **Example:**
  "Valid medical license issued to Sunrise Medical Centre by the Ministry of Health. Renewal due June 2026."

2. Tags

- Use **tags** to add searchable keywords to your document.
- Type a keyword and press **Enter** to add it.
- You can include multiple tags such as:
  - registration, license, insurance, compliance, policy
- **Tip:** Keep tags consistent across your uploads so searching is easier.

⭐ 3. Mark as Favorite

- Toggle this switch **on** if the document is important or frequently referenced.
- Favorite documents appear **at the top of your Document Vault** for quick access.
- Ideal for critical or high-use items (e.g., “Clinic Operating License”, “Staff Roster”).

💾 4. Saving Your Document

Once all required fields are filled:

- Click **Create** → Saves and closes the form.
- Click **Create & Create Another** → Saves current file and opens a new blank form for more uploads.
- Click **Cancel** → Exits without saving.

💡 Best Practices

- Use **consistent naming** for all document titles (e.g., “Clinic_Name_DocumentType_Year”).
- Always fill in **Category**, **Description**, and **Tags** for faster retrieval.
- **Update or replace** expired documents promptly to maintain compliance.
- Use **Favorites** for documents required in audits or renewals.

CRM

🧾 Create Contact — User Guide

This page allows you to add and organize new contacts in your WhizzIQ system.
You can enter their **basic details, communication information, relationship stage, and business value** in one form.

🧍 1. Basic Information

These are the required fields that help identify who the person is and how they relate to your organization.

- **Full Name:**
  Enter the person's complete name (e.g., *John Doe*). This field is required.
- **Company:**
  The name of the business, organization, or institution they are associated with. (e.g., *Acme Corp*, *Sunshine Medical Centre*).
- **Job Title:**
  Their position at the company (e.g., *Marketing Manager*, *Doctor*, *Principal*).
- **Type (Required):**
  Choose how this contact relates to you.
  Common options:
  - *Client* – Someone you serve or sell to
  - *Lead* – A potential customer or patient
  - *Partner* – Business collaborator
  - *Vendor* – Supplier
  - *Investor* – Financial supporter
- **Status (Required):**
  Select their current engagement level.
  Examples: *Active*, *Inactive*, *Pending*, *Prospect*.
- **Priority (Required):**
  Rank the importance of this contact.
  - *High:* Key client or urgent lead
  - *Medium:* Regular engagement
  - *Low:* Occasional contact

📞 2. Contact Details

These fields store how to reach the person directly.

- **Email:**
  Add a valid business or personal email (e.g., *jane@zenithhealth.com*).
- **Phone:**
  Enter their phone number including the country code (e.g., *+1 876 555 0100*).
- **Website:**
  The company or individual's website (optional). (e.g., *https://acmecorp.com*).
- **LinkedIn URL:**
  Paste their LinkedIn profile link (e.g., *https://linkedin.com/in/janedoe*).

- **Twitter Handle:**
  Enter their Twitter or X handle, starting with @ (e.g., *@janedoe*).

📍 **3. Address**

Use this section to record their physical location.

- **Street Address:**
  Full address including building number or street (e.g., *123 Main Street*).
- **City, State, ZIP/Postal Code, Country:**
  Fill in these fields accurately.
  - For example: *City:* Kingston, *State:* St. Andrew, *ZIP:* 00010, *Country:* Jamaica. *(You can select the country from the dropdown menu.)*

💬 **4. Relationship Management**

Track interactions, relationship warmth, and future follow-ups.

- **Last Contact Date:**
  The last time you communicated with them (meeting, call, email, etc.).
  Click the calendar icon to pick a date.
- **Next Follow-Up Date:**
  When you plan to reach out next (useful for sales, patient check-ins, or project updates).
- **Relationship:**
  Choose the nature of your current relationship:
  - *Hot:* Actively engaged or ready to move forward
  - *Warm:* Interested but not urgent
  - *Cold:* Inactive or unresponsive
- **Lead Source:**
  How you discovered this contact (e.g., *Referral*, *Website*, *Event*, *LinkedIn*).
- **Tags:**
  Click the **"+"** icon to create or add multiple descriptive tags such as:
  VIP, Corporate Client, Repeat Buyer, Supplier, Partner.
  These help with filtering and searches later.

💰 **5. Business Value**

This section captures the total value generated by this contact.

- **Lifetime Value:**
  Displays the total amount earned from this person or company.
  💡 *It is automatically calculated from "Won Deals" linked to this contact.*

🗒️ **6. Notes**

Keep additional context or reminders here.
Examples:

- "Prefers communication via email."
- "Send renewal documents in January."
- "Met at HealthTech Expo 2025."

✅ **Final Steps**

1. Double-check all fields for accuracy.
2. Click **Create** to save the contact, or **Create & create another** to add more without leaving the page.
3. You can later link this contact to tasks, deals, and appointments within WhizzIQ.

📤 How to Upload Contacts from a CSV File

You can upload contacts in bulk to WhizzIQ using a properly formatted CSV file.
Follow these steps to ensure your upload goes smoothly and all contact data imports correctly.

🧾 Step 1: Prepare Your CSV File

Make sure your file follows the correct structure.
Each column in your CSV must match the fields in WhizzIQ exactly.

✅ **Required column headers (in this exact order):**

Name, Email, Phone, Company, Job Title, Type, Status, Priority, Address, City, State, Zip, Country, Website, LinkedIn, Twitter, Notes, Source, Relationship

Example row:

John Doe, john@example.com, +1-555-0100, Acme Corp, CEO, client, active, high, 123 Main St, New York, NY, 10001, USA, https://acmecorp.com, https://linkedin.com/in/johndoe, @johndoe, Met at conference, referral, hot

Tips before uploading:

- No blank column headers or extra commas.
- Save the file as **CSV (.csv)** — *not* Excel (.xlsx).
- Emails must be unique.
- Include a country code in phone numbers (e.g., +1 876 555 0100).
- If you later add dates, use the format **YYYY-MM-DD**.

📁 Step 2: Go to the Import Page

1. Log in to your **WhizzIQ Dashboard**.
2. Navigate to **Contacts → Import Contacts**.
3. The import screen will appear with the option **Upload from CSV**.

📂 Step 3: Upload Your File

1. Click **Browse** or **Drag & Drop** your CSV file into the upload area.
    - Example file: Contacts_Exact_Template_300.csv
2. Wait for the system to read your file — a short preview will load.

If your file is formatted correctly, WhizzIQ will automatically detect and map the columns.

⚙️ Step 4: Check Column Mapping

You will see how your CSV headers align with WhizzIQ contact fields.
Verify that each one matches correctly:

CSV Column	**Mapped To**
Name	Full Name
Company	Company
Job Title	Job Title
Type	Contact Type
Status	Contact Status
Priority	Priority Level

Address	Street Address
City / State / Zip / Country	Location Details
Email / Phone / Website	Contact Details
LinkedIn / Twitter	Social Profiles
Notes / Source / Relationship	Relationship Info

If something is mismatched, use the dropdown beside the field to select the right mapping.
Once everything looks correct, click **Continue**.

🔍 Step 5: Preview Your Import

You will see a preview of several rows from your CSV.
Check for:

- Missing or incorrect names.
- Emails with spaces or extra symbols.
- Numbers or text in the wrong columns.

If all looks good → click **Confirm Import**.
If not → click **Cancel**, correct your CSV, and upload again.

🕓 Step 6: Wait for Processing

The system will now process your contacts in batches.
Large files (e.g., 300+ contacts) may take a few minutes.
When complete, you'll see a message like:
✅ Import complete! 300 contacts added successfully.

📋 Step 7: Verify Your Contacts

After upload, open **Contacts** → **All Contacts** and confirm that:

- All names and emails display properly.
- Phone numbers and addresses are in the right format.
- Tags, type, and relationship statuses are correct.

⚠️ Common Upload Issues

Problem	What It Means	How to Fix
File format invalid	Wrong file type or extra commas	Re-save as .csv and confirm headers
Header mismatch	Column names don't match required headers	Rename headers using the guide above
Duplicate emails skipped	Duplicate contact emails found	Remove duplicates before import
Encoding error	Special characters (accents, symbols)	Save as **UTF-8 CSV**

💡 **Pro Tips**

- After uploading, you can add **tags** like “VIP,” “Partner,” or “Prospect.”
- You can assign imported contacts to **campaigns** or **follow-up tasks**.
- Use **Filters** in the Contacts page to group by *Type*, *Priority*, or *Source*.

✅ **Quick Summary**

Step	Action
1	Format your CSV exactly as shown above
2	Go to **Contacts → Import Contacts**
3	Upload your CSV file
4	Verify column mapping
5	Review the preview data
6	Confirm the import
7	Check contacts after upload

🧾 User Guide: Create Deal

The **Create Deal** page allows users to record and track new business opportunities in their pipeline. Each deal represents a potential sale, project, or client engagement.

1. Deal Information Section

Field	Description
Contact*	Select the client or company contact from your existing contact list. This links the deal to that individual or organization.
Title*	Enter a clear name for the deal, such as *"$30K Website Revamp"* or *"Annual Consulting Contract."*
Description	Provide additional details about the deal — such as project scope, client requirements, or objectives.

💡 *Tip:* Use descriptive titles and detailed notes to make deals easier to identify later.

2. Pipeline & Value Section

Field	Description
Stage*	Choose the current progress level of the deal, e.g. *Lead, Proposal Sent, Negotiation, Contract Sent, Won, or Lost.*
Deal Value*	Enter the estimated monetary value of the deal (e.g., *15000*).
**Win Probability (%)*	Represents your estimated likelihood of closing the deal. This can auto-adjust as you move stages.
Priority*	Select *Low, Medium,* or *High* depending on deal urgency or strategic importance.
Expected Close Date*	Select the anticipated closing date for the deal. This helps with forecasting and pipeline management.
Currency*	Choose the relevant currency for the deal value (e.g., USD, EUR, JMD).

💡 *Tip:* Keep "Expected Close Date" realistic — it helps your pipeline projections remain accurate.

3. Products & Line Items Section

Field	Description
Products/Services	Click **Add Product/Service** to associate specific offerings (e.g., *SEO Package, Web Design, Data Dashboard*) with this deal. This provides insight into what is being sold and its value breakdown.

💡 *Tip:* Linking products ensures better sales analysis and revenue reporting later.

4. Additional Information Section

Field	Description
Lead Source	Specify how the deal originated — for example, *Referral, Website, Event, Cold Call,* or *Inbound Inquiry.*
Notes	Add relevant comments, such as client feedback, meeting outcomes, or follow-up reminders.

💡 *Tip:* Always log key client discussions here for context if other team members need to review the deal.

5. Action Buttons

Button	Function
Create	Saves the current deal and exits the form.
Create & Create Another	Saves the current deal and opens a new blank deal form.
Cancel	Discards any entered data and returns to the previous page.

✅ **Example**

Title: $20K Marketing Retainer
Description: 6-month retainer for SEO, Google Ads, and Social Media.
Contact: David Johnson
Stage: Negotiation
Deal Value: 20000
Win Probability: 70%
Priority: High
Expected Close Date: 2025-12-08
Currency: USD
Lead Source: Referral
Notes: Renewal of previous contract; awaiting final confirmation.

🧭 User Guide: Create Contact Segment

The **Create Contact Segment** page allows users to group contacts based on specific characteristics, such as activity level, relationship strength, lifetime value, or follow-up needs. This feature is essential for organizing your CRM and tailoring communication to different audiences.

1 Segment Details Section

Field	Description
Segment Name*	Enter a clear, descriptive name for your segment. Example: *High-Value Clients*, *Leads Needing Follow-Up*, or *Inactive Clients.*
Description	Briefly explain the purpose of the segment. This helps team members understand why the group was created.
Color	Choose a color to visually identify this segment in your dashboard. You can use color coding (e.g., Green for top clients, Orange for leads).
Mark as Favorite	Toggle this on if the segment should appear at the top of your segment list for quick access. Useful for frequently used filters.

💡 *Tip:* Choose intuitive segment names and colors so your CRM data remains easy to navigate and analyze.

2 Segment Filters Section

This section defines the **criteria** that determine which contacts will appear in your segment.

Filter	Description
Contact Type	Filter contacts by category such as *Client, Lead, Partner, or Vendor.* Selecting "Any Type" includes all contact types.
Status	Specify whether you want *Active, Inactive,* or *Pending* contacts. Helps you separate engaged vs. dormant contacts.
Priority	Sort by urgency or importance — *Low, Medium, or High.* Useful for sales prioritization.
Relationship Strength	Choose *Strong, Moderate, or Weak* to group contacts based on your relationship quality.
Min Lifetime Value ($)	Filter by minimum spending or value generated. Example: Enter *10000* to show clients worth at least $10K.
Max Lifetime Value ($)	Optional — enter a maximum threshold to refine by smaller deal clients.
Has Deals	Toggle on to show only contacts linked to at least one deal. Helps identify revenue-generating customers.
Needs Follow-Up	Toggle on to highlight contacts flagged for follow-up. Helps sales teams stay proactive.
Last Contact (days ago)	Enter a number (e.g., *30*) to find contacts not contacted in that many days. Ideal for re-engagement campaigns.
Source	Filter based on where the contact came from — e.g., *Website, Referral, LinkedIn, or Event.*

Tags (contains)	Use tags to segment contacts by specific labels such as *VIP, Enterprise, Cold Lead,* or *Past Client.*

💡 *Tip:* You can combine multiple filters (e.g., "Active clients" + "High Value" + "Strong Relationship") to create very specific groups.

3 Action Buttons

Button	Function
Create	Saves the current contact segment and returns to your segment list.
Create & Create Another	Saves the current segment and opens a blank form to create another one immediately.
Cancel	Exits without saving any data entered.

4 Example Segment Configurations

Example 1: High-Value Clients

- **Segment Name:** High-Value Clients
- **Description:** Clients with lifetime value above $10,000 and active status.
- **Filters:**
    - Contact Type: Client
    - Status: Active
    - Min Lifetime Value: 10000
    - Relationship Strength: Strong
    - Priority: High
    - Has Deals: ✅
    - Source: Referral, Website
- **Color:** Green (#4CAF50)

Example 2: Leads Needing Follow-Up

- **Segment Name:** Leads Needing Follow-Up
- **Description:** Prospective clients not contacted in the last 30 days.
- **Filters:**
    - Contact Type: Lead
    - Status: Pending
    - Needs Follow-Up: ✅
    - Last Contact (days ago): 30
    - Relationship Strength: Moderate
    - Source: LinkedIn, Event
- **Color:** Orange (#FFA500)

Example 3: Inactive Clients (Reactivation List)

- **Segment Name:** Inactive Clients
- **Description:** Former clients who have not been engaged in over 90 days.
- **Filters:**
  - Contact Type: Client
  - Status: Inactive
  - Needs Follow-Up: ✅
  - Last Contact (days ago): 90
  - Relationship Strength: Weak
  - Has Deals: ❌
  - Source: Referral
- **Color:** Red (#D32F2F)

5 Best Practices

✅ Use consistent naming conventions across segments.
✅ Review and update segments monthly to keep filters relevant.
✅ Use segments for **targeted email campaigns, follow-up scheduling,** or **sales pipeline insights.**
✅ Combine this feature with the **Deals** or **Email Templates** sections to create powerful automation workflows.

EMAIL COMMUNICATION

💌 User Guide: Creating an Email Template

The **Email Template** feature allows you to create reusable email messages for automations, campaigns, and direct communication. Templates save time, ensure consistency, and can automatically personalize each message using **dynamic variables** (placeholders that pull real data from your system).

🧾 Step 1: Access the Email Template Creator

1. Go to **Email Templates → Create Template**.
2. You will see two main sections:
    - **Template Information** — where you define how your template is stored and categorized.
    - **Email Content** — where you write the actual message that will be sent.

🧩 Step 2: Complete the "Template Information" Section

Field	Description	Example Input
Template Name*	The internal name for your template. Keep it short and descriptive.	Appointment Reminder
Description	A short explanation of what the template is used for.	Reminds clients about their upcoming appointments.
Category*	Select the appropriate category to help organize templates (e.g., Appointments, Marketing, Billing).	Appointments
Active	Keep this **ON** to make the template usable in emails, campaigns, and automations.	✅ Enabled
Set as Default	Optional. Turn this **ON** if you want this template to be the default for its category.	Off (can be toggled later)

✍️ Step 3: Fill in the "Email Content" Section

This is where you write your subject and email body.

Field	Purpose	Example Input
Email Subject*	The subject line your recipient will see. You can personalize it using variables.	Reminder: Your appointment on {{next_appointment_date}}
Email Body*	The message content. You can include formatted text, links, and placeholders that the system fills in automatically.	*(See example below)*

Example Email Body:
Hi {{first_name}},

This is a reminder that you have an upcoming {{appointment_type}} scheduled with {{owner_company}}.

📅 Date: {{next_appointment_date}}
⏰ Time: {{next_appointment_time}}
🏢 Location: {{address}}, {{city}}, {{state}}

If you have any questions, please contact us at {{owner_email}} or call {{owner_phone}}.

Thank you,
{{owner_name}}
{{owner_company}}

🔄 Step 4: Understanding and Using Dynamic Variables

Dynamic variables (also called *merge tags* or *placeholders*) automatically pull personalized information from your contact database or business settings when an email is sent.
You insert them by typing {{variable_name}} exactly as shown — enclosed in double curly brackets.
For example:

- Typing Hi {{first_name}}, becomes **Hi Alicia,**
- Typing {{next_appointment_date}} becomes **March 12, 2025**
- Typing {{owner_company}} becomes **Riverside Wellness Clinic**

🧠 How Dynamic Variables Work

When you send an email:

1. The system looks up each variable (like {{first_name}} or {{owner_email}}).
2. It replaces that variable with the actual data from the contact or your company profile.
3. Every recipient receives a version of the same template — but personalized with their details.

This means you can send one template to hundreds of people, and each email will appear custom-written.

💡 Available Variables and Their Meanings

Variable	Description	Example Output
{{name}}	Full contact name	"Alicia Martinez"
{{first_name}}	Contact's first name	"Alicia"
{{last_name}}	Contact's last name	"Martinez"
{{email}}	Contact's email address	"alicia.martinez@example.com"
{{phone}}	Contact's phone number	"+1 876 555 4321"
{{company}}	Contact's company name	"Sunrise Dental Clinic"
{{job_title}}	Contact's role	"Patient"

{{address}}	Full street address	"123 Main Street"
{{city}}, {{state}}, {{country}}	Location fields	"Kingston", "St. Andrew", "Jamaica"
{{website}}	Website URL	"https://sunrisedental.com"
{{next_appointment_date}}	The client's next appointment date	"March 12, 2025"
{{next_appointment_time}}	Appointment time	"2:00 PM"
{{appointment_type}}	Appointment type	"Dental Cleaning"
{{last_contact_date}}	Date of last communication	"Feb 26, 2025"
{{relationship_strength}}	Relationship rating	"Warm"
{{lifetime_value}}	Total client value	"JMD $120,000"
{{owner_name}}	Your name or team name	"Dr. Michael Foster"
{{owner_email}}	Your business email	"info@riversidewellness.com"
{{owner_phone}}	Your business phone	"+1 876 222 8899"
{{owner_company}}	Your company name	"Riverside Wellness Clinic"
{{current_date}}	Current date	"February 18, 2025"
{{current_year}}	Current year	"2025"

📌 **Tip:** Use variables in both the **subject** and **body** to create highly personalized communication (e.g., *"Hi {{first_name}}, your {{appointment_type}} is coming up on {{next_appointment_date}}"*).

🧮 Step 5: Preview and Test Your Template

Before finalizing:

1. Review your subject line and body text.
2. Confirm that all variables use correct spelling and curly braces ({{ }}).
3. Save the template by clicking **Create** or **Create & Create Another**.
4. To test it:
    - Open a contact in your database.
    - Send a test email using the new template.
    - Verify that variables correctly display actual names, dates, and contact information.

⚙️ Step 6: Save and Activate

Once tested:

1. Toggle **Active** ON.
2. Save the template.
3. It's now available to use in:
    - Campaigns and newsletters
    - Automated appointment reminders
    - Follow-up sequences
    - Direct contact emails

⚠️ Common Mistakes to Avoid

Issue	What Happens	Fix
Variable is misspelled (e.g., {{frist_name}})	The placeholder appears in the email instead of the data.	Check the correct spelling from the variable list.
Forgot curly brackets	The text doesn't convert.	Always use double braces {{ }}.
Template inactive	It won't appear in automation or campaigns.	Ensure "Active" is toggled ON.
No subject or body	Template won't save.	Fill all required fields.

💡 Pro Tips for Better Templates

- **Keep it conversational:** Write as if speaking directly to the reader.
- **Use emojis sparingly:** They can add warmth (e.g., "Your visit tomorrow 😊").
- **Add links:** Use the chain icon to add website or booking links.
- **Create multiple categories:** e.g., *Reminders, Promotions, Internal Notices.*
- **Use test data:** Send a preview email to yourself before going live.

✅ Quick Recap

Step	Action
1	Go to **Email Templates → Create Template**
2	Fill in the **Template Information** section
3	Write your **Subject** and **Body**
4	Insert **Dynamic Variables** for personalization
5	Test with sample data
6	Save and toggle **Active** ON

📧 User Guide: Compose Email

The **Compose Email** screen allows you to send one-time or scheduled emails to your contacts, either by writing a new message from scratch, using a saved template, or generating content automatically using AI.

🧠 1. AI Email Generation

At the top of the screen, you'll find the **AI Email Generation** section.
This feature can automatically generate email content based on the purpose of your message.

How to use:

1. Click the dropdown arrow next to "AI Email Generation."
2. Enter a short prompt describing the email you want (e.g., *"Write a friendly follow-up to a patient after their appointment."*).
3. The AI will create a draft for you — which you can edit and personalize before sending.

Tip:
You can use the AI-generated email as a base, then fine-tune the tone using the **Improve**, **Make Shorter**, **Make Longer**, **More Professional**, or **More Friendly** buttons.

👥 2. Recipients

This section determines who will receive the email.

Field	Description
Select Contacts*	Choose one or more contacts from your database. You can select individual names or entire groups.
Multiple Selection	Hold Ctrl (Windows) or Cmd (Mac) to select multiple recipients.

Example:
If you are sending an appointment reminder, select all patients scheduled for tomorrow.

🧾 3. Email Template (Optional)

You can save time by using an existing **Email Template** created earlier in the Templates module.

Field	Description
Use Template	Select a pre-existing email template (e.g., "Appointment Reminder," "New Client Welcome," or "Follow-Up Thank You").
Customize After Loading	Once selected, the subject and body fields will automatically populate. You can still edit them before sending.

Tip:
Using templates ensures your messages stay consistent and automatically apply dynamic variables (like {{first_name}} or {{next_appointment_date}}).

✍️ 4. Email Content

This is where you write, review, and personalize your message.

Subject Line

Enter your email's subject.
You can include dynamic variables such as:

- {{first_name}} → Becomes "Alicia"
- {{next_appointment_date}} → Becomes "March 5, 2025"

Example Subject:

Reminder: Your upcoming appointment on {{next_appointment_date}}

Email Body

Compose your main message here. Use the formatting toolbar to:

- **Bold (B)** important text
- *Italicize (I)* for emphasis
- Add **links**
- Create bullet points or numbered lists
- Undo/Redo edits

AI Enhancement Tools:

- 🟩 **Improve** – Refines grammar and tone.
- 🟨 **Make Shorter** – Condenses the text for brevity.
- 🟦 **Make Longer** – Expands with more details.
- 💼 **More Professional** – Adjusts tone for formal communication.
- 😀 **More Friendly** – Adds a conversational tone.

🔄 Dynamic Variables (Personalization)

Dynamic variables automatically pull real data from your contact records, replacing placeholders with actual information for each recipient.

Variable	Description	Example Output
{{name}}	Full contact name	*Alicia Martinez*
{{first_name}}	First name only	*Alicia*
{{last_name}}	Last name only	*Martinez*
{{email}}	Email address	*alicia@example.com*
{{phone}}	Phone number	*+1 876 555 4321*
{{company}}	Company name	*Riverside Dental*
{{job_title}}	Contact's role	*Patient*
{{address}}	Full address	*123 Main St, Kingston*
{{next_appointment_date}}	Next appointment date	*March 5, 2025*
{{next_appointment_time}}	Next appointment time	*2:00 PM*
{{appointment_type}}	Type of appointment	*Consultation*
{{owner_name}}	Your name	*Dr. Michael Foster*
{{owner_company}}	Your company	*Riverside Wellness Clinic*

Example:
In your draft:

Hi {{first_name}},
This is a reminder for your {{appointment_type}} at {{owner_company}} on {{next_appointment_date}} at {{next_appointment_time}}.

Will send as:
Hi Alicia,
This is a reminder for your Consultation at Riverside Wellness Clinic on March 5, 2025 at 2:00 PM.

⏰ 5. Scheduling

This section controls **when** your email will be sent.

Option	Description
Send Immediately	Sends the email as soon as you click "Send Email."
Schedule for Later	Toggle OFF "Send Immediately" to set a custom date and time for sending. Useful for campaigns or reminders.

Example:
Schedule a "Payment Reminder" email to go out at 9:00 AM the next morning.

📎 6. Attachments (Optional)

You can include up to **5 attachments**, each up to **10MB** in size.

Supported File Types	PDF, Word, Excel, PowerPoint, Text, Image, ZIP
Upload Options	Drag & drop files directly or click **Browse** to select manually.

Example:
Attach an invoice, report, or medical form related to the contact's visit.

✉️ 7. Sender Information

Define who the email will appear to come from.

Field	Description
From Name	The name shown in the recipient's inbox (e.g., "Riverside Clinic Team").
From Email	The email address used to send the message (e.g., "info@riversideclinic.com").
Reply To Email	(Optional) The email address where replies should go. Leave blank to use the same as "From Email."

Example:
From Name: *Riverside Clinic*
From Email: *info@riversideclinic.com*
Reply To: *reception@riversideclinic.com*

🚀 8. Sending the Email

After completing your setup:

1. Review your recipients and message for accuracy.
2. Confirm variables ({{first_name}}, {{next_appointment_date}}) appear correctly in the preview.
3. Click **Send Email** (green button, top-right).

If you chose to schedule it, it will send automatically at the set time.

⚠️ Common Mistakes to Avoid

Issue	Cause	Fix
Variables don't populate	Typo or missing contact data	Double-check variable spelling and contact fields
Email fails to send	Missing recipient	Ensure at least one contact is selected
Attachments rejected	File too large or unsupported format	Limit to 10MB per file and use accepted formats
Template doesn't load	Template inactive	Activate it in the **Email Templates** section

💡 Pro Tips

- Use **AI tools** to instantly adapt tone (friendly, professional, concise).
- Combine **templates** + **variables** for the fastest and most personalized messages.
- Always preview before sending bulk emails.
- If you regularly send the same type of message, save it as a template for future use.

✅ Quick Summary

Step	Action
1	Choose contacts or groups under **Recipients**
2	(Optional) Load a pre-saved **Email Template**
3	Write or edit your **Subject** and **Body**
4	Add personalization with {{variables}}
5	(Optional) Upload files and attachments
6	Schedule or send immediately
7	Click **Send Email**

FINANCE

🧾 User Guide: Create Invoice Client

The **Create Invoice Client** form allows you to add new clients to your invoicing system. Each client entry includes their personal or company information, billing address, and tax details. These details are automatically available for selection when generating new invoices, saving time and ensuring consistency in billing.

1 Client Information Section

This section captures key details about the person or organization you're invoicing.

Field	Description
Full Name*	Enter the full legal name of the client. For companies, you may enter the primary contact person (e.g., "Sarah Thompson").
Company Name	Enter the registered name of the company (e.g., "MedLink Health Systems Ltd."). If it's an individual client, you may leave this blank.
Email	Provide the client's primary billing or contact email. Invoices and payment reminders will be sent here.
Phone	Add the client's phone number for follow-ups or verification. Include the country code (e.g., +1 for the U.S., +44 for the U.K.).

💡 *Tip:* Always double-check spelling and email accuracy to avoid bounced invoices.

2 Address Section

This section ensures accurate billing and regional tax compliance.

Field	Description
Street Address	Enter the client's full billing address. For companies, use their official office address.
City	The client's city of residence or business operation.
State	The state, province, or parish applicable to the address.
ZIP/Postal Code	Enter the postal or ZIP code for the address.
Country	Choose the client's country from the dropdown list. This field defaults to "United States" but can be updated.

💡 *Tip:* For international clients, ensure the address matches their invoicing requirements or government ID.

3 Additional Information Section

This section stores tax identifiers and extra billing notes.

Field	Description
Tax ID / VAT Number	Enter the client's tax identification or VAT registration number (required for business invoices and compliance).
Notes	Use this field for internal notes about the client — such as payment preferences, billing cycles, or special conditions.
Active Client Toggle	Toggle "Active Client" to ON if the client is currently active. Inactive clients will not appear in invoice creation dropdowns.

💡 *Tip:* Keep the client active only while doing business with them — toggle off when a contract ends or an account is closed.

4 Action Buttons

Button	Function
Create	Saves the client and returns to the invoice client list.
Create & Create Another	Saves the client and opens a new blank form to add another client immediately.
Cancel	Exits the form without saving any information.

5 Example Entries

Example 1: Business Client

- **Full Name:** Sarah Thompson
- **Company Name:** MedLink Health Systems Ltd.
- **Email:** sarah.thompson@medlinkhealth.com
- **Phone:** +1 (646) 555-7321
- **Street Address:** 455 Madison Avenue, Suite 900
- **City:** New York
- **State:** NY
- **ZIP:** 10022
- **Country:** United States
- **Tax ID / VAT Number:** 84-6752319
- **Notes:** Retainer client billed monthly.
- **Active Client:** ✅

Example 2: Local Business Client

- **Full Name:** Marcus Lee
- **Company Name:** Lee's Auto Diagnostics
- **Email:** marcus.lee@leesauto.com
- **Phone:** +1 (876) 320-4987
- **Street Address:** 12 Molynes Road
- **City:** Kingston
- **State:** St. Andrew
- **ZIP:** KGN 10
- **Country:** Jamaica
- **Tax ID / VAT Number:** 003-456-879
- **Notes:** Requires invoices sent to accounting@leesauto.com
- **Active Client:** ✅

Example 3: Individual Client

- **Full Name:** Olivia Martinez
- **Email:** olivia.martinez@gmail.com
- **Phone:** +44 7700 345678
- **Street Address:** 28B Notting Hill Gate
- **City:** London
- **State:** Greater London
- **ZIP:** W11 3JE
- **Country:** United Kingdom
- **Tax ID / VAT Number:** GB-92487653
- **Notes:** Occasional consulting client; prefers PayPal invoices.
- **Active Client:** ✅

6 Best Practices

✅ Always enter tax details for corporate clients to comply with invoicing regulations.
✅ Keep the **“Active Client”** toggle on for current customers and off for inactive or archived ones.
✅ Use consistent company naming conventions for easy search and reporting.
✅ Add descriptive notes (e.g., “billed quarterly,” “requires PO before invoice”) for clarity.
✅ For international clients, confirm VAT or tax formats specific to their region.

💼 User Guide: Beautiful Invoice Builder

The **Beautiful Invoice Builder** lets you create professional invoices quickly and send them directly to clients with built-in design, pricing, and notes options.
It's divided into **four key sections**:

1. **Invoice Details**
2. **Line Items**
3. **Pricing & Design**
4. **Notes & Terms**

Each section is explained in detail below.

🧾 1 Invoice Details

This section defines the main information for your invoice — who it's for, when it's due, and its reference number.

Field	Description
Select Client*	Choose an existing client from your saved list. Clients must be created in the "Create Invoice Client" section first.
Invoice Number*	A unique identifier for the invoice (e.g., INV-1024). Use a consistent numbering format for easy tracking.
Invoice Date*	The date the invoice is issued. Defaults to the current date but can be changed.
Due Date*	The date by which payment must be received. Usually 15–30 days after issue.
Currency*	Select the billing currency (e.g., USD, GBP, EUR). This determines the invoice format and symbol.

Action Buttons:

- **Save as Draft** – Saves the invoice without sending it. Useful for edits or approvals.
- **Preview PDF** – Generates a live preview of the final invoice layout.
- **Save & Send** – Saves and emails the invoice to the client immediately.

💡 *Tip:* Use consistent invoice numbering (like INV-2025-001) for easier accounting.

🧱 2 Line Items

This section breaks down what you're billing for — each service, product, or deliverable.

Field	Description
Item / Service Description*	Enter the title of the service or product (e.g., "Website Maintenance Plan").
Additional Details (Optional)	Provide extra context such as deliverable scope, terms, or service period.
Qty*	Quantity or units sold (e.g., 1 for a project, 10 for items).
Unit Price ($)*	Cost per unit or per service.
Line Total	Automatically calculated as *Qty × Unit Price*.

Click **+ Add Item** to include multiple services or products in one invoice.
Click the **trash icon** 🗑️ to delete an item, or **duplicate icon** 📄 to copy one quickly.

💡 *Tip:* Be descriptive but concise in "Additional Details" — it adds professionalism and clarity.

💰 3 Pricing & Design

This section lets you manage tax, discounts, and invoice appearance.

Pricing Fields

Field	Description
Tax Rate (%)	Enter applicable tax percentage (e.g., 15%). Automatically adds the calculated amount.
Discount Amount ($)	Input a flat discount (not percentage). Subtracted from subtotal before total calculation.

Invoice Design

Field	Description
Choose Template	Select from available templates — Modern Blue, Elegant Purple, Minimal Gray, or Vibrant Green.
Primary Color	Main color theme of your invoice — matches your brand identity.
Accent Color	Secondary color for highlights and buttons. Adds visual contrast.

💡 *Tip:* Match your **Primary** and **Accent Colors** to your company's logo for consistent branding.

🗒️ 4 Notes & Terms

This section is for personalized instructions, payment rules, and end messages.

Field	Description
Invoice Notes	Add special notes for the client — e.g., "Includes 3-month maintenance support."
Payment Terms & Conditions	Outline expectations — e.g., "Payment due within 30 days. Late fee applies after due date."
Invoice Footer	Add a closing remark — e.g., "Thank you for your business!" or your signature line.

💡 *Tip:* Always include your **payment terms** to avoid disputes. Specify methods accepted (bank transfer, PayPal, etc.).

🧩 5 Example Invoices

Example 1: MedLink Health Systems Ltd.

- **Client:** Sarah Thompson
- **Invoice Number:** INV-1024
- **Invoice Date:** 29/10/2025
- **Due Date:** 28/11/2025
- **Currency:** USD ($)

Line Items:

- Website Maintenance Plan – $800
- SEO Optimization – $500
- Performance Report – $200

Subtotal: $1,500
Tax (15%): $225
Total: $1,725
Design: Elegant Purple
Notes: "Thank you for your continued partnership. Payment due in 30 days."
Footer: "Thank you for choosing MedLink Digital Services."

Example 2: Lee's Auto Diagnostics

- **Client:** Marcus Lee
- **Invoice Number:** INV-1025
- **Invoice Date:** 29/10/2025
- **Due Date:** 15/11/2025
- **Currency:** USD ($)

Line Items:

- Accounting System Setup – $1,200
- Staff Training – $400
- Support Subscription – $150

Subtotal: $1,750
Tax (10%): $175
Discount: $50
Total: $1,875
Design: Modern Blue
Notes: "Training materials included. Payment due in 15 days."
Footer: "We appreciate your business. Let's keep your books balanced!"

✅ 6 Best Practices

✔ Always review client details before sending.
✔ Save invoices as drafts for internal checks.
✔ Keep tax and discount values consistent with your accounting policy.
✔ Use color templates that match your branding for professionalism.
✔ Include payment terms on every invoice to protect against late payments.
✔ Use the **Preview PDF** feature to confirm formatting before sending.