Your whole business.
Five guided trainings.

Business Owner Manual • Booking, clients, websites, marketing, automations, payments and staff

01 Set up your business correctly

02 Run your daily bookings from start to finish

03 Manage the client journey and staff

04 Publish and promote your business

05 Maintain automations and the full business office

Follow these five sections in order when opening a new business. Already operating? Jump directly to the training you need. Features vary by your plan and purchased add-ons; no workflow bypasses membership or owner approvals.

01 | Account, business profile & payments

Set up your business correctly

STEP 1. Sign in, choose the correct business membership, and open Business Profile. Enter the owner name, business name, email, phone number, business city, state and ZIP code; save and confirm that the information reloads.

STEP 2. From Booking Studio, verify the business category, booking link name, time zone and any tax-specific settings. Use the full monthly calendar and Booking Studio daily/weekly calendar as separate tools.

STEP 3. Open Payment Connections to link a Stripe account. Confirm the connected business account before charging clients. Stripe checkout, subscription charges and staff payout entitlements are separate flows.

STEP 4. Open Hours & Breaks to configure available days, business hours, buffers, lunch, minimum notice, booking windows, closed dates and blocked times. Use owner override only when editing an appointment as permitted.

STEP 5. Open Notifications to set email/push preferences; book a test service and verify confirmation, reminders and appointment notifications. Check plan/add-on access in Upgrade Your Studio.

Finish this training by opening the linked pages in Calenvella, saving a non-sensitive example, and checking the result on your business dashboard.

02 | Booking Studio, services & calendars

Run your daily bookings from start to finish

STEP 1. Open Booking Studio directly from the Business Tools menu; review the Day/Week calendar, appointment counts, action shortcuts, revenue and scheduled bookings. Open My Calendar for full Day/Week/Month management.

STEP 2. Create categories, appointment types and add-ons in Services & Pricing. Set service descriptions, length, price, deposit and any required intake forms, waivers or documents. Check the live client booking preview.

STEP 3. Use the calendar + control to manually add appointments (including phone and intake details), mark completed/no-show/canceled, or assign staff when included. Never confirm a payment-required booking before payment succeeds.

STEP 4. Open an appointment to reschedule, change services, issue a cancellation, inspect deposits/balances or process an owner-authorized refund. Use business-owner override when explicitly permitted and prevent staff conflicts.

STEP 5. Open Appointment Requests for client-initiated changes and Booking History for past/canceled bookings. Manage availability in Hours & Breaks; use Calendar Sync to link external calendar feeds.

Finish this training by opening the linked pages in Calenvella, saving a non-sensitive example, and checking the result on your business dashboard.

03 | Client management, forms & team

Manage the client journey and staff

STEP 1. Open Client Management. Use Overview, Appointments, Messages, Invoices, Quotes, Onboarding, Documents and Notifications to inspect the selected client without losing context.

STEP 2. Create client records and search by name, email or phone. Import separate client, service and appointment CSV files through Import Studio when your plan includes it; confirm appointment type and avoid duplicate clients.

STEP 3. Build intake questions, waivers and required uploads in Services & Forms; assign saved forms per appointment type. Review submitted intake and securely collected documents before the service starts.

STEP 4. Use the client portal to support reschedule requests, outstanding balances, cancellations and messaging. Keep sensitive tax IDs in secure onboarding forms, not in general messages.

STEP 5. If staff seats are included or purchased, invite and approve staff, configure their calendar and service access, confirm their own booking link/site, and review payment-routing permissions. Test with a staff account.

Finish this training by opening the linked pages in Calenvella, saving a non-sensitive example, and checking the result on your business dashboard.

04 | Website, storefront & marketing

Publish and promote your business

STEP 1. Open Website Builder, choose the allowed template or Design Freely, adjust colors/images/pages, preview desktop and mobile, then publish. Test your public booking link after each design change.

STEP 2. Open Product Storefront, create physical or digital products, set prices and inventory/delivery settings, connect the correct Stripe payout path, and test product checkout separately from appointment deposits.

STEP 3. Open Email Marketing to manage approved audience lists, sender identity, consent and campaigns; preview, schedule, send and check Email Analytics. Email allowances vary by plan or purchased upgrades.

STEP 4. Open Coupons from Booking Studio. Assign coupons to specific services or products, choose percentage or fixed value, limit usage/expiration, and test that a discount never exceeds the charge. Review mystery discounts separately.

STEP 5. Review website analytics, visitor trends and service/product performance; update promotions and rebooking invitations based on completed bookings instead of sending duplicates.

Finish this training by opening the linked pages in Calenvella, saving a non-sensitive example, and checking the result on your business dashboard.

05 | Automation Studio, billing & support

Maintain automations and the full business office

STEP 1. Open Automation Studio directly from Business Tools. Manage your available reminders, waitlist, follow-ups, reviews/rebooking, loyalty/referrals and related flows from its hub instead of searching the long menu.

STEP 2. For each automation, review its trigger, audience, message, schedule, active state, and any add-on requirement. Test one sample client journey before enabling an automation for all customers.

STEP 3. Open Revenue and Billing & Subscriptions to review actual Stripe payment amounts, deposit/balance records, paid seats, email upgrades and invoice/transaction details. Reconcile settled amounts rather than estimates.

STEP 4. For tax offices, use entitled tax onboarding, Schedule C, quotes and document review tools; do not make these general features visible for offices without the correct entitlement.

STEP 5. For help, open Help & Training, read the matching chapter, and submit a support request with the page name, problem, time and non-sensitive screenshot. Check replies in your private support inbox.

Finish this training by opening the linked pages in Calenvella, saving a non-sensitive example, and checking the result on your business dashboard.