

The Complete User Guide

COMPLETE GUIDE

Everything the system can do — explained one job at a time,
in plain English, with a picture of every screen.
Simple enough for anyone to follow.

Welcome to Pawtal HQ 👋

Pawtal HQ is your all-in-one home for running a pet-care business — boarding, pet sitting, dog walking, grooming, pet taxi and equine services. It keeps your customers, their pets, your bookings, your calendar and your invoices neatly in one place, on any computer, phone or tablet.

This guide explains **every single thing the system can do**, one job at a time. Each job has a picture of exactly what you'll see, so you always know you're in the right place. You don't need to be "good with computers" — if you can use email, you can use Pawtal HQ.

Two things make this guide easy to read

🎁 Everything is included

There is only **one Pawtal HQ plan**, so every job in this guide is yours to use — nothing here is an optional extra or a paid add-on. If you can find it in these pages, it is switched on in your account.

An orange strip runs down the **right edge of every job**. It's there to help you flick through, not to mark anything off-limits.

🖥️ 📱 Two pictures each

Every screen is shown **twice** so it looks right whatever you're holding:

🖥️ DESKTOP VIEW — how it looks on a **computer or laptop**, with the menu down the left.

📱 MOBILE VIEW — how it looks on a **phone**. A few things move to make room — the menu tucks away and buttons appear along the bottom.

Where a phone does something differently, you'll see a green **"On a phone…"** note explaining exactly what changes.

The golden rule: nothing you do is set in stone. Almost everything can be edited later, and the system always asks "are you sure?" before anything is removed for good. Click around and explore — you won't break anything.

Throughout this guide we use a make-believe business, **"Happy Tails Pet Care"**, to show you the screens. Your screens will show your own business name, logo, services and prices.

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PART 1

Getting started

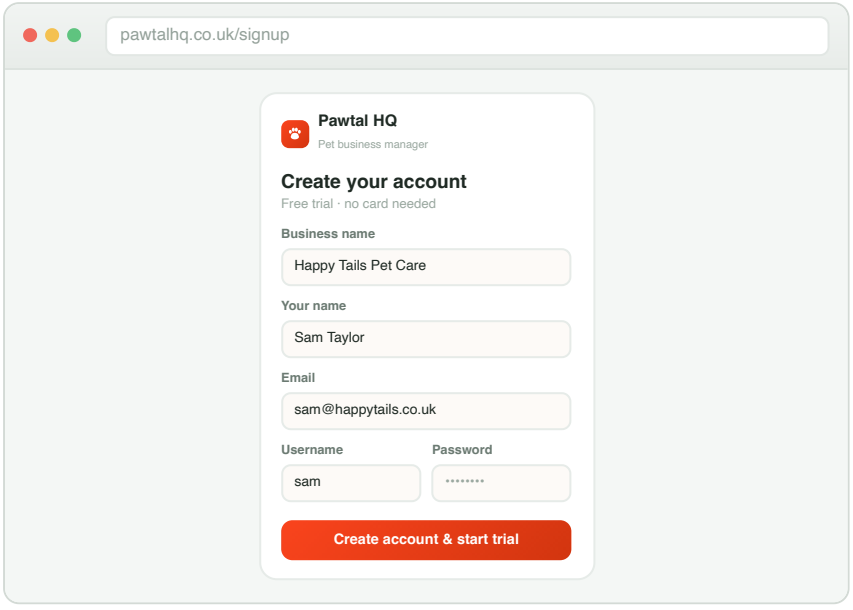
Create your account, tell Pawtal HQ about your business, and learn your way around.

1 Creating your account

Before anything else you need your own Pawtal HQ account. It's free to start and no card is needed.

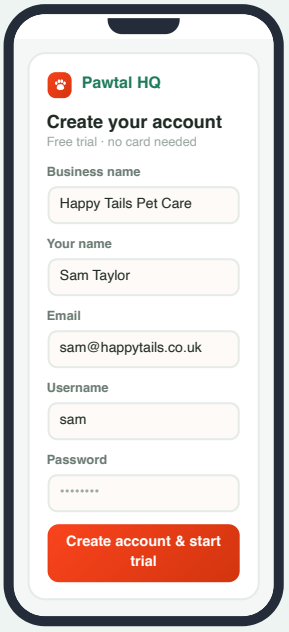
1. In your web browser, go to **pawtalhq.co.uk** and click **Start free trial**.
2. Fill in your **business name**, **your name**, your **email**, a **username** (the short name you'll log in with) and a **password** of at least 8 characters. Type the password again to confirm it.
3. Click **Create account & start trial**. That's it — you're in, and the system takes you straight to setting up your business (Task 3).

DESKTOP VIEW



The sign-up page — a few boxes and one button.

MOBILE VIEW



Same boxes, stacked to fit a phone.

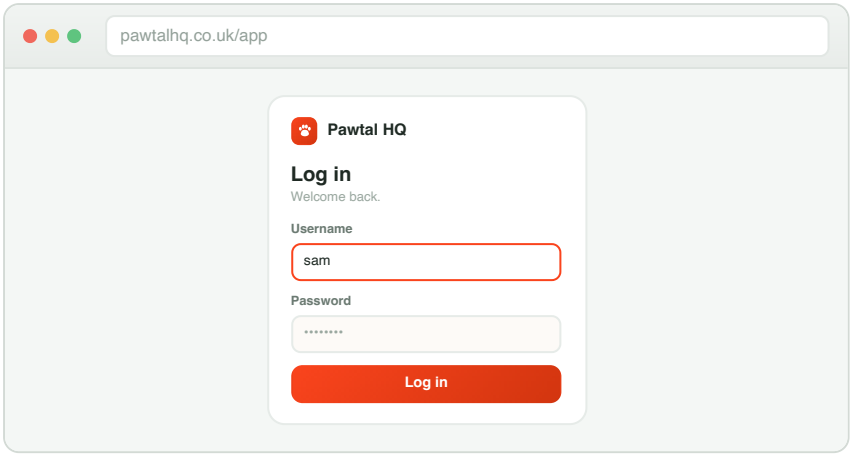
Pick a password you'll remember but others won't guess. You can change it any time later — see Task 40.

2 Logging in and out

Once you have an account, this is how you get back in each time.

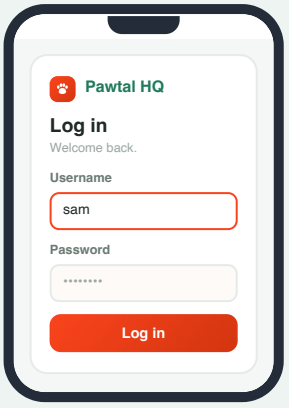
1. Go to **pawtalhq.co.uk/app** in your browser. (Worth saving as a bookmark!)
2. Type your **username** and **password**, then click **Log in**.
3. If you've switched on two-step verification (Task 40), you'll also be asked for a 6-digit code from your phone.
4. To **log out** when you're finished, click ↩ **Log out**. Always log out if you share the device.

DESKTOP VIEW



The log-in page. Your username is the short name you chose — not your email.

MOBILE VIEW



Identical on a phone — just full width.

> 📱 **On a phone…**
> The ↩ **Log out** link lives inside the menu. Tap ≡ **More** at the bottom-right to slide the menu out, then tap **Log out** at the foot. On a computer it's always visible at the bottom-left.

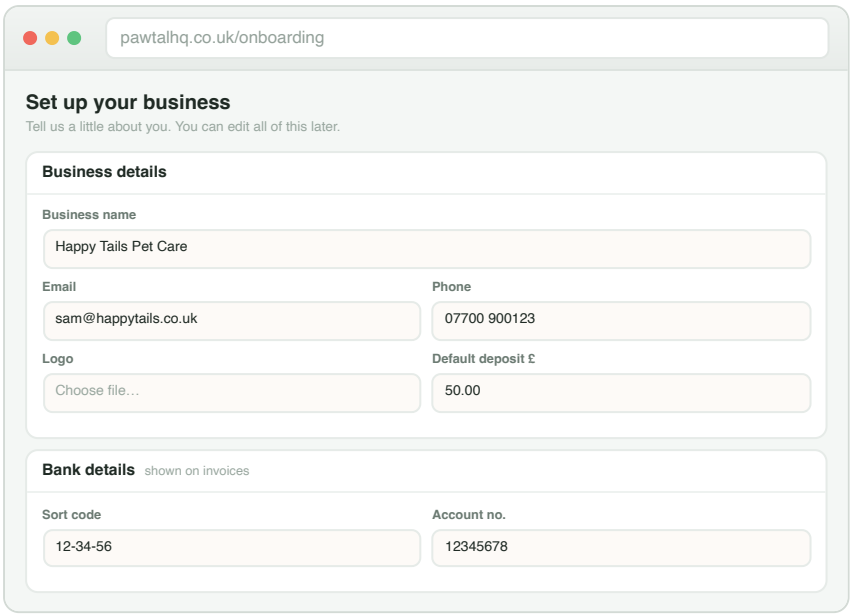
3 Setting up your business

Right after signing up you'll see the **Set up your business** page. This is where you tell Pawtal HQ who you are. You can change any of it later from ⚙️ **Business settings**.

1. **Business details** — name, contact email, phone and address. These appear on your invoices.
2. **Logo** — click **Choose file** and pick a picture of your logo. It shows at the top-left and on every invoice. You can skip it and add it later.
3. **Bank details** — account name, sort code and account number, so customers can pay you by bank transfer.
4. **Default deposit £** — the deposit you usually ask for. New invoices start at this figure (you can change it any time), and auto billing (Task 25) uses it too.

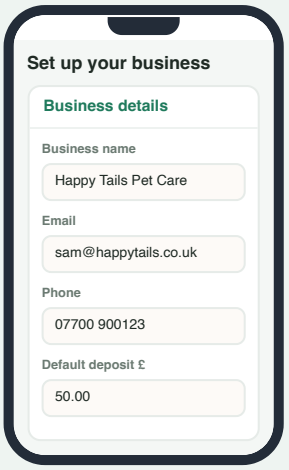
5. Carry on down to choose your services and prices (Task 4), then click **Save & start using Pawtal HQ**.

DESKTOP VIEW



The top of the set-up page: your details, logo, bank details and usual deposit.

MOBILE VIEW



The same form; boxes stack into one column.

On a phone…

Nothing is missing — the two-across boxes simply stack one above the other so they're big enough to tap. Scroll down to reach services, prices and the **Save** button.

4 Choosing your services & prices

Pawtal HQ has six built-in services: **Pet Boarding / Cattery**, **Pet Sitting**, **Dog Walking**, **Dog Grooming**, **Pet Taxi** and **Equine Services**. Tick the ones you offer — a pricing box appears for each, and the system uses those prices to work out booking costs for you.

1. On the set-up page (or later in ⚙ **Business settings**), tick each service you offer.
2. **Boarding** — first choose **how you charge**: by the day (the arrival and departure days both count, so Friday to Monday is 4 days) or by the night (the same stay is 3). Then set your rate for the first pet and each extra pet from the same family, plus optional short-stay and peak-season rates. **Max pets at once** is your capacity (leave 0 for no limit).
3. **Walking** — four prices: solo/group, 30-minute/1-hour. **Sitting** — per visit, per day, per overnight. **Grooming** — your standard groom. **Taxi** — base fare + per mile. **Equine** — per hour and/or per visit.

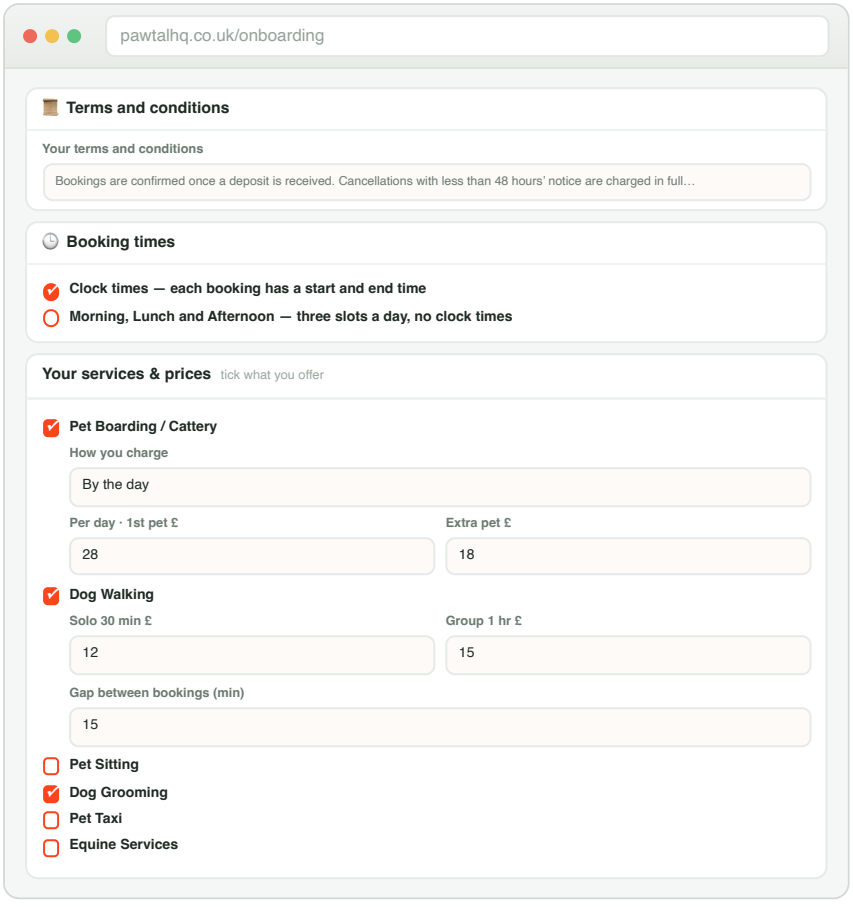
4. **Gap between bookings** — every service except boarding has this box too. Type the minutes of clear time you need before and after each booking of that service: 30 for a groom so you can clean the table, 15 for a walk so you can get to the next one. Leave it blank for none.

5. **Booking times** — the card just above your services. Keep **Clock times** (every booking has a start and end time), or choose **Morning, Lunch and Afternoon**: three booking slots a day and no clock times at all. Boarding stays keep their drop-off and pick-up times either way.

6. **Terms and conditions** — paste yours, or link to them on your website. Customers booking online must tick that they agree, and the agreement is recorded on their customer record (Task 8).

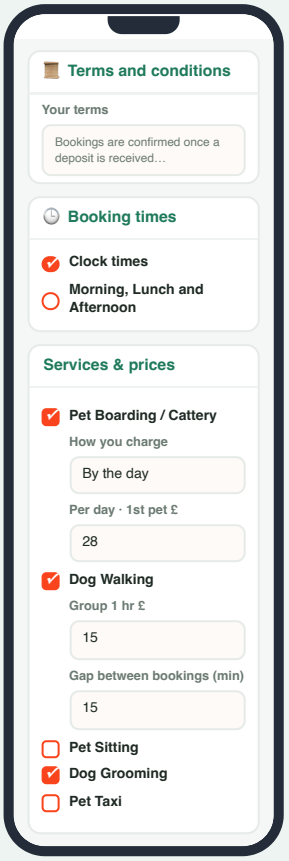
7. Click **Save & start using Pawtal HQ**.

DESKTOP VIEW



Tick a service and its pricing boxes appear underneath.

MOBILE VIEW



Same ticks and prices; one tap-friendly column.

Changed your prices later? Bookings you've already saved keep the amount they were priced at. When you change your boarding rates — or switch between charging by the day and by the night — Pawtal HQ lists every boarding booking that would now come to a different figure and lets you tick which ones to bring up to date. Stays that have finished, or that you've already taken money for, are listed but left unticked.

Gaps between bookings. With a gap set, a booking of that service can't sit within that many minutes of any other timed booking — before it or after it. Book inside a gap yourself and Pawtal HQ warns you, names the booking in the way and the earliest clear start, and lets you change the gap for that one booking or save anyway (Task 12). Customers booking online are simply told the next free time (Task 29). Boarding stays are never part of this — pets board side by side, and your **Max pets at once** looks after capacity.

Morning, Lunch and Afternoon. Choose this and your appointments calendar shows the three slots on every day, each booking is made for a slot rather than a time, and customers booking online pick **Morning**, **Lunch** or **Afternoon** (Task 29). The slots have no set hours — they mean whatever suits your business — so nothing anywhere shows a clock time for them. Bookings made before you switched keep their times and sit in the slot their time falls in (before midday is Morning, midday to 2pm Lunch, after 2pm Afternoon); open one and it asks for a slot. Gaps between bookings need clock times, so those boxes disappear while you're on slots. Boarding stays carry on exactly as before.

Terms and conditions. A customer agrees **once**: by ticking on your booking page (the request arrives marked **✓ T&Cs agreed** and accepting it stamps their record), by the link you can email from their record, or by you clicking **Agreed in person** for a paper form. Edit your terms later and everyone who agreed before reads as **older version** until they agree again — the Customers list shows who's where. Only the date, the version and how they agreed are kept.

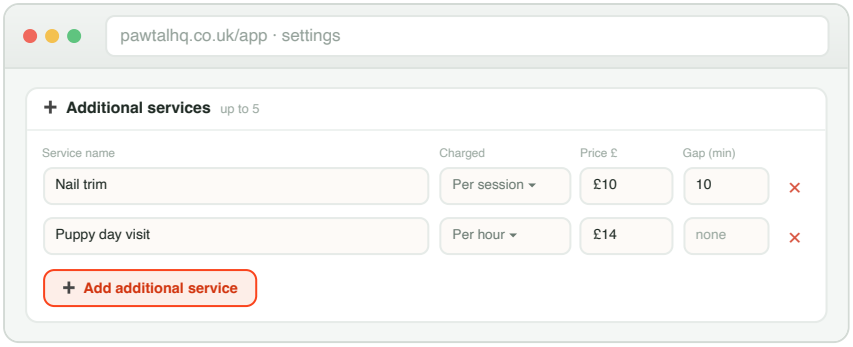
Only offer one service? No problem — just tick that one. Every screen adapts: you'll only ever see the calendars and options that apply to you.

5 Adding your own (custom) services

Offer something that isn't on the built-in list — a nail trim, a quick day visit, a wash? Add up to **five** of your own services and they work just like the built-in ones.

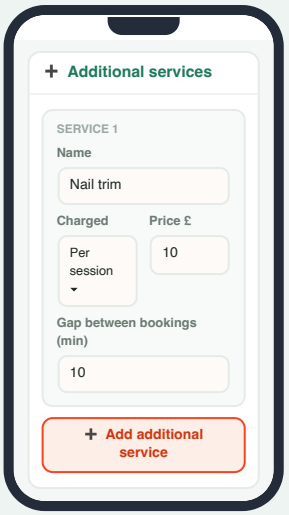
1. In ⚙ **Business settings**, scroll to **+ Additional services**.
2. Click **+ Add additional service** and type the name (e.g. "Nail trim").
3. Under **Charged**, pick how you price it: **Per ½ hour**, **Per hour**, **Per session**, **Per day**, or **Manual price**. Then type the **Price £** — and, if you need clear time around it, the **Gap (min)** between bookings.
4. Repeat for any others (up to five), then click **Save**. They now appear when you add a booking and on your invoices.

DESKTOP VIEW



Two custom services added — each with its own way of pricing.

MOBILE VIEW



On a phone each service becomes its own stacked card.

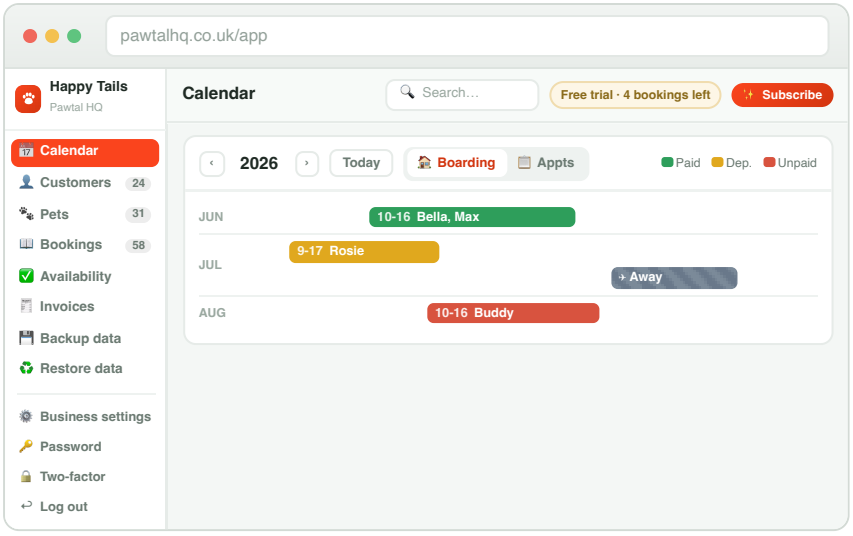
Manual price? Pick this when the cost varies. The price box disappears and you simply type the amount into **Amount due** when you add each booking.

6 Finding your way around

Everything hangs off the **menu**. On a computer that menu sits down the left. On a phone it tucks away to save space and a row of buttons appears along the bottom — this is the biggest difference between the two, so it's worth a good look.

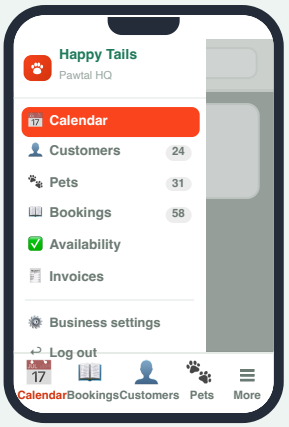
1. **Top-left** — your logo and business name, so you always know it's your account.
2. **Calendar** — your bookings laid out visually. **Customers / Pets / Bookings** — your three lists (the little number shows how many). **Availability** — free dates at a glance. **Invoices** — branded PDF invoices.
3. **Backup / Restore** and ⚙️ **Business settings**, 🔑 **Password**, 🔒 **Two-factor**, ↩ **Log out** sit at the bottom.
4. **Top bar** — the search box and your licence badge.

DESKTOP VIEW



The main screen: menu down the left, search & licence badge along the top, your chosen page in the middle.

MOBILE VIEW



*Tap ≡ **More** and the same menu slides in from the left. The bottom bar keeps your four busiest pages one tap away.*

📱 On a phone…

The left menu is hidden until you tap **≡ More** (bottom-right) — then it slides out exactly like the computer's menu. The bottom bar has your five most-used buttons: **Calendar · Bookings · Customers · Pets · More**. Everything else lives behind **More**.

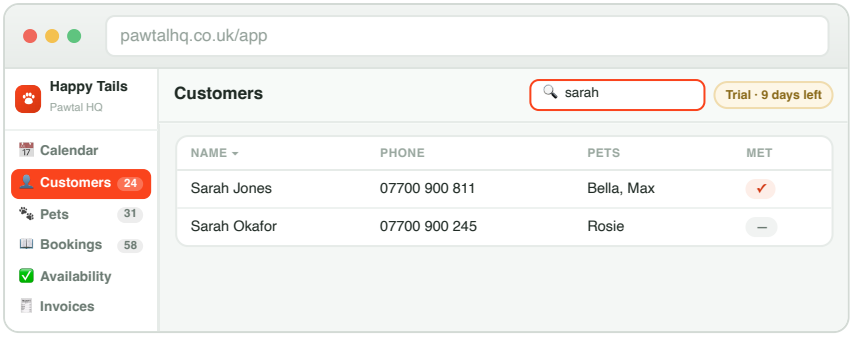
The rest of the menu: 🚀 Getting started, 📨 Booking requests, 📩 Import data, 👥 Team, 💳 Online payments and 💬 Help & support. All of them are included, and each has its own section later in this guide.

7 Searching for anything

The search box at the top works on the Customers, Pets and Bookings pages — handy once your lists grow.

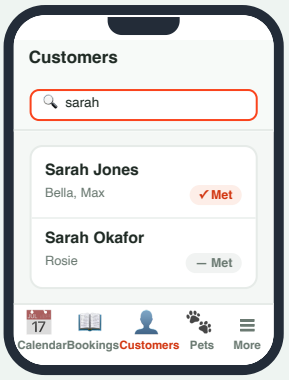
1. Open the list you want to search (for example **Customers**).
2. Click the **Search…** box at the top and start typing — a name, an email, a phone number, a breed…
3. The list narrows as you type. Clear the box to see everyone again.

DESKTOP VIEW



Typing “sarah” instantly narrows the customer list.

MOBILE VIEW



The search box drops to its own full-width row; each customer becomes a little card.

On a phone…

The search box moves onto its own line under the page title so it’s wide and easy to tap. Long tables turn into tidy stacked cards — one per customer — instead of scrolling sideways.

You can also sort any list by tapping a column heading — tap again to flip the order. The ▲ / ▼ arrow shows the current sort.

PART 2

Customers & pets

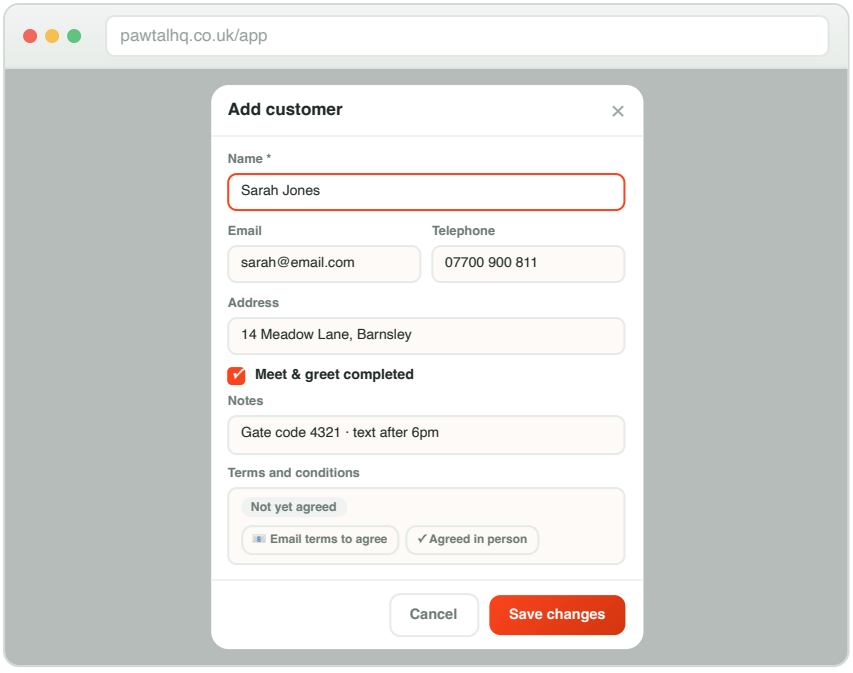
Your address book of pet owners and their animals — the heart of everything else.

8 Adding a customer

A customer is a pet's owner. Add the person first — then you can add their pets and bookings.

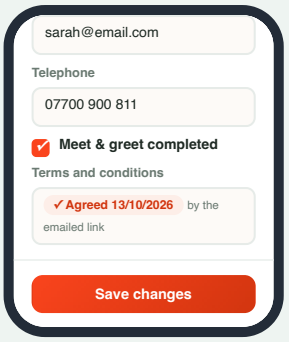
1. Click 👤 **Customers** in the menu, then the blue **+ Add customer** button at the top-right.
2. Type their **name** (the only must-have). Email, telephone and address are optional but useful — the email becomes a clickable link, and the address appears on invoices.
3. **Meet & greet completed** — tick this once you've met the customer and pet; your list shows a tick so you can see who's still to meet.
4. **Terms and conditions** — once saved, this box shows whether they've agreed to your terms (Task 4): 📧 **Email terms to agree** sends a link to tick; **✓ Agreed in person** records a paper form.
5. Add any **Notes** (a gate code, the best time to call), then click **Add customer**. On the Customers list, 📝 **View** opens a customer's notes.

DESKTOP VIEW



The customer form. Only the name is required — fill in the rest as and when. The Terms box appears once the customer is saved.

MOBILE VIEW



On a phone the form slides up from the bottom as a "sheet".

On a phone…

Forms open as a **bottom sheet** that slides up from the bottom of the screen, rather than a box in the middle. The **Add / Save** button stretches full-width so it's easy to tap with a thumb.

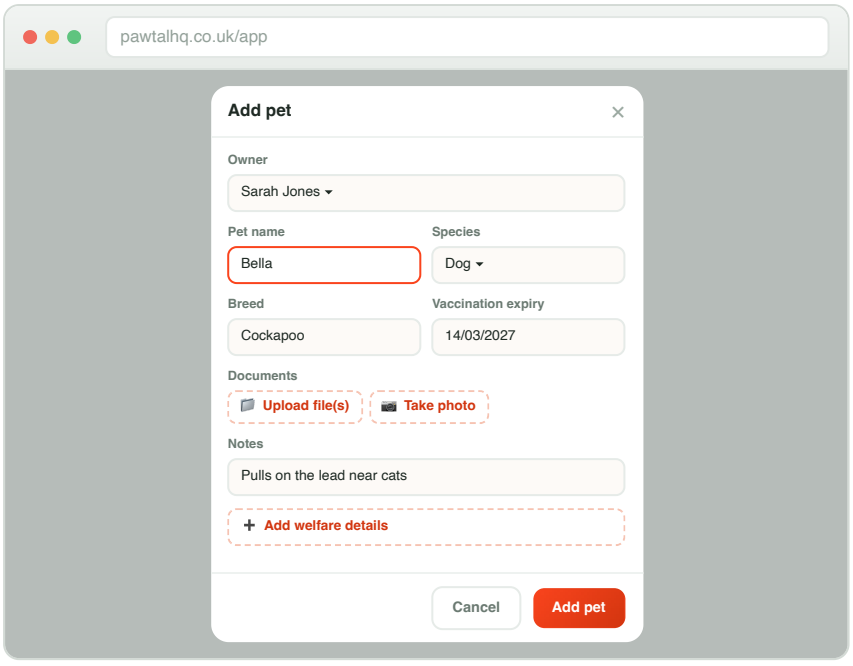
9 Adding a pet

Every pet belongs to a customer, so add the owner first — dog, cat, horse or anything else.

1. Click 🐾 **Pets** in the menu, then **+ Add pet**.
2. Choose the **owner** from the list, and type the pet's **name**.
3. Pick the **species** and, if you like, breed, birth year, sex and neutered/spayed.
4. **Vaccination expiry** — pop the date in; your Pets list shows it, so out-of-date jabs stand out.
5. **Documents** — 📁 **Upload file(s)** takes as many as you like (PDF, JPG or PNG, up to 10 MB each); on a phone or tablet 📷 **Take photo** uses the camera, one photo per tap. Photos are shrunk before they upload.
6. **Notes** — anything worth remembering about the pet; the Pets list's 📝 **View** opens them.

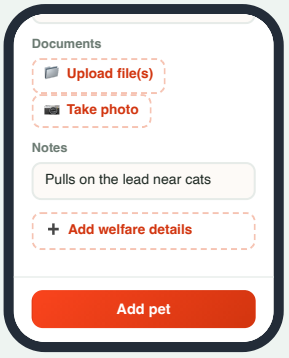
7. **+ Add welfare details** unfolds insurer and policy number, vet, microchip, diet, medication / behaviour, walking routine, last worming and flea dates — none required. Left blank on a pet with a document, a field reads *See uploaded document(s)*. Then click **Add pet**.

DESKTOP VIEW



The Add Pet form — documents, notes and welfare details sit below the basics, folded away until needed.

MOBILE VIEW



Same fields, stacked into the bottom sheet.

About documents: every document belongs to a pet. On the Pets list the 📎 chip shows how many a pet has — tap it for a scrollable viewer with **Open** and **Download** for each; 📋 **View** shows the welfare details the same way, 📝 **View** the notes, and **Edit pet** takes you to the form to add, replace or delete anything. Documents are **private**: only you and your staff can open one, signed in, and a file's web address can't be shared, guessed or found by a search engine.

Good to know: if a pet's vaccinations are out of date (or blank), its bookings show a striped "check vaccinations" pattern on the calendar — so you never miss it.

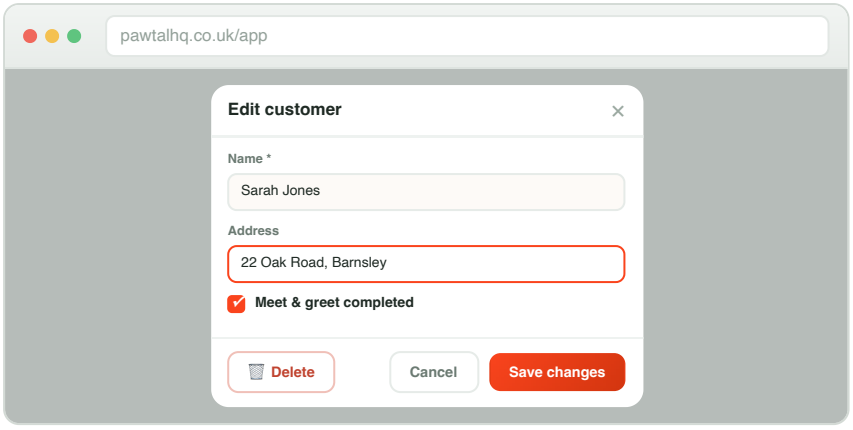
10 Changing or deleting a record

People move house, pets gain weight, dates change. Any customer, pet or booking can be edited — or removed — at any time.

1. **To change:** open the right list, **tap the row** you want (or tap any booking on a calendar). The record opens with everything filled in — change what you need and click **Save changes**.
2. **To delete:** open the record and click the red **Delete** button at the bottom-left.

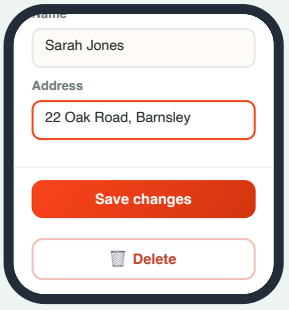
3. A message asks if you're sure — click **OK** to confirm, or **Cancel** to change your mind.

DESKTOP VIEW



*Editing a record — same form as adding, with **Save changes** and a red **Delete** button.*

MOBILE VIEW



The delete button drops below Save so it can't be tapped by accident.

The safety net: you can't delete a customer who still has pets on file, or a pet that still has bookings — the system politely refuses and tells you why. Delete or move the pets/bookings first. This stops you losing a customer's history by accident.

Changed a booking's dates or pets? The price recalculates automatically — but it never overwrites a price you typed in yourself without showing you first. **Prefer a safety copy first?** Save a backup before a big tidy-up (Task 27).

PART 3

Bookings

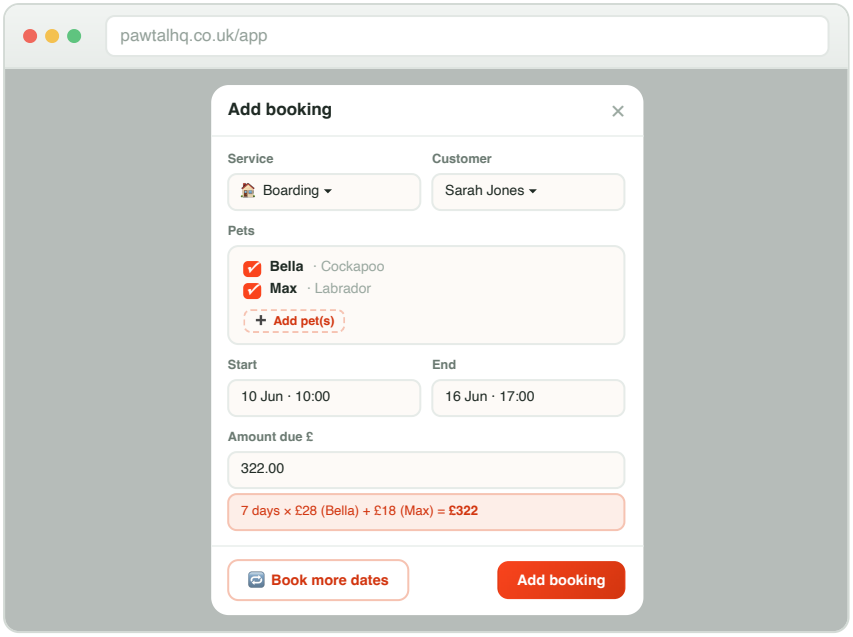
Every stay, walk, groom, sit, taxi run and equine visit — and your own days off.

11 Creating a boarding booking

A boarding booking is an overnight stay — it has an arrival and a departure and appears as a coloured bar on the year planner.

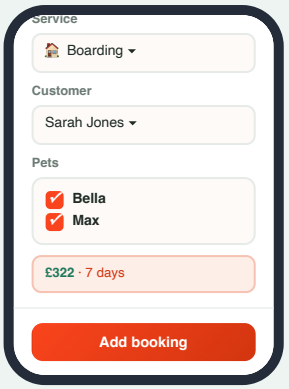
1. Click 📖 **Bookings** → **+ Add booking**.
2. **Service** — choose **Boarding**. **Customer** — start typing the owner's name and pick them. **New customer?** Choose ＋ **Add a new customer** at the bottom of the list and add them there and then — no need to leave the form.
3. **Pets** — their pets appear as tick-boxes. Tick everyone coming; one booking can hold the whole family and the price handles the multi-pet rates. A pet not on file yet? ＋ **Add pet(s)** underneath adds them on the spot (just species and name — details can wait).
4. **Start / End** — the arrival and departure date and time.
5. **Amount due** fills itself in from your boarding rates. Type over it if you agreed a different price. Click **Add booking**.

DESKTOP VIEW



A boarding booking for Bella and Max — both pets ticked, dates set, price worked out underneath.

MOBILE VIEW



The same form as a bottom sheet — scroll for the dates and Repeat button.

Recording money: when a deposit or final payment arrives, open the booking and enter it in **Deposit paid** or **Balance paid**. The calendar colours follow the money — **red** (nothing paid), **amber** (deposit), **green** (paid).

Nothing slips through unpriced: every booking needs its customer, at least one pet and both dates before it will save — and if **Amount due** is £0, the app double-checks you meant it. That way every stay shows up properly when it's time to invoice.

12 Booking an appointment (walking, grooming & more)

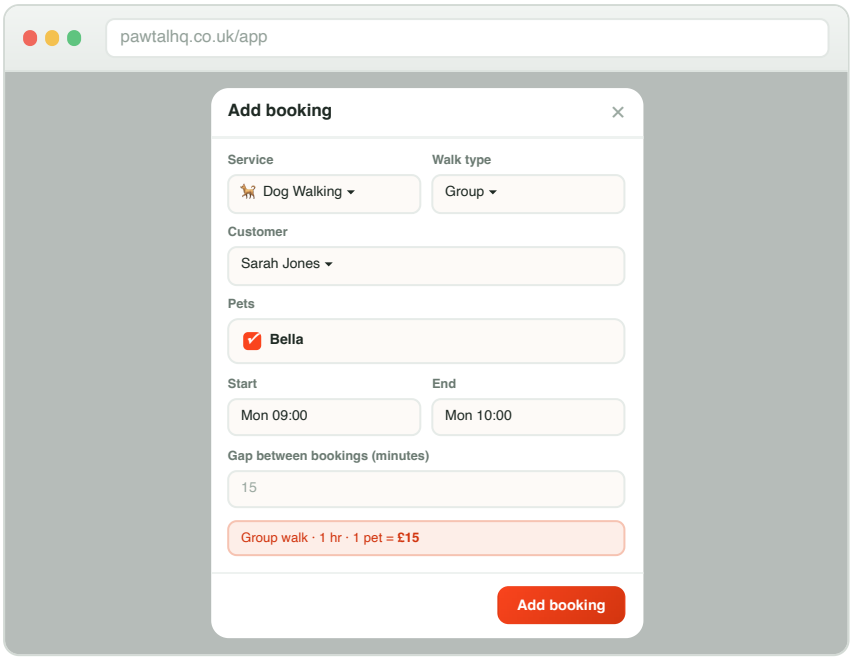
Everything that isn't boarding — pet sitting, dog walking, grooming, taxi runs and equine visits — is an **appointment**: it happens at a time of day rather than overnight.

1. Click 📖 **Bookings** → **+ Add booking** — or click a free day, hour or slot on the appointments calendar and the date and time fill in for you (Task 20).
2. **Service** — pick the service. The form adapts: Dog Walking adds a **Walk type** (solo or group); Pet Sitting and Equine offer an **All day** tick-box.
3. Pick the **customer** and tick the **pets**.
4. **Start / End** — the date and the times it starts and finishes (e.g. 09:00 to 10:00). End stays on the same day as Start and moves with it, keeping the length, so you only set the finish time once. On a **Morning / Lunch / Afternoon** business (Task 4) these become a date and a **Time of day** box instead — no clock times.

5. **Gap between bookings** — shows the gap you gave this service in Business settings (Task 4). Leave it as it is, or type a different number to change the gap for this booking only.

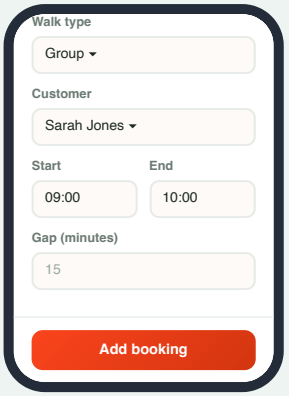
6. The price fills in from your price list — per pet, so two pets on one walk is priced for two. Click **Add booking**.

DESKTOP VIEW



*A dog-walking appointment — note the **Walk type** box that appears just for walking.*

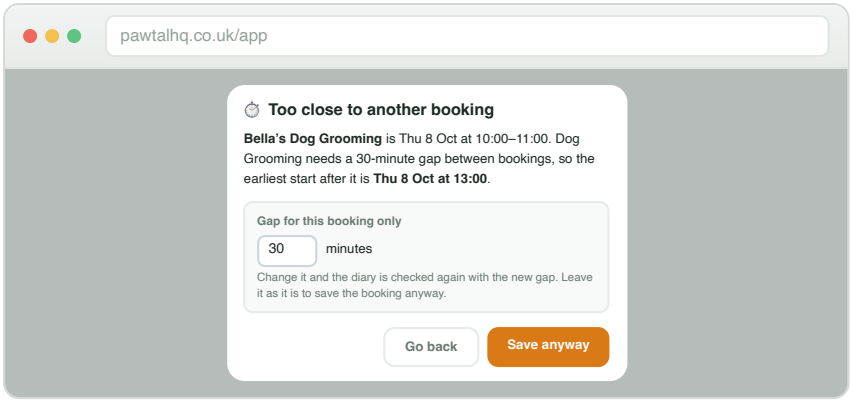
MOBILE VIEW



Extra boxes (like Walk type) appear on the phone too — just stacked.

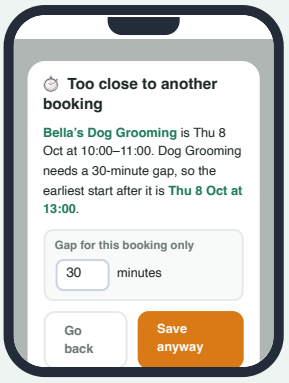
"Too close to another booking"? If the times you've set sit inside a gap, Pawtal HQ stops to warn you before saving. The warning names the booking in the way and gives you the earliest clear start — for example *"Bella's Dog Grooming is Thu 8 Oct at 10:00–11:00. Dog Grooming needs a 30-minute gap between bookings, so the earliest start after it is Thu 8 Oct at 13:00."* You then have three choices: **Go back** and change the times; type a different **gap for this booking only** and it's checked again straight away; or **Save anyway**. Whatever you choose affects this booking alone — your settings and every other booking stay as they were.

DESKTOP VIEW



The gap warning: the booking in the way, the earliest clear start, and your three choices.

MOBILE VIEW



The same warning on a phone.

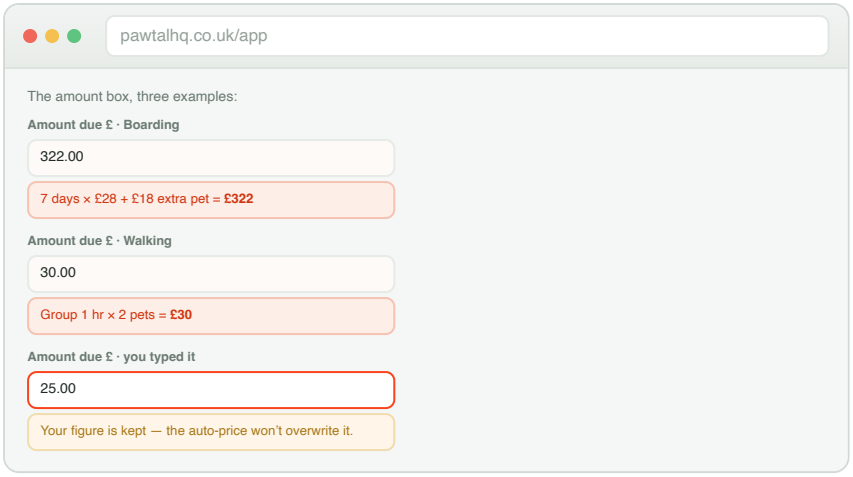
Tip: the quickest way to start is from the calendar — click a free day, a free hour in the Day view, or a free Morning / Lunch / Afternoon slot, and the date and time are already filled in (Task 20).

13 Letting prices work themselves out

You almost never need a calculator. As you build a booking, the orange note under **Amount due** shows the price and exactly how it was worked out — change the dates, pets or service and it updates instantly.

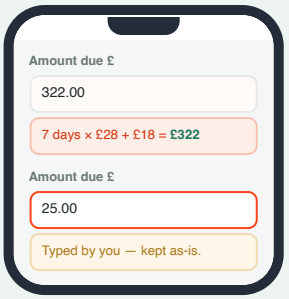
1. **Boarding** — the length of the stay × your rate, counted in days or nights depending on how you charge: full rate for the first pet, your "extra pet" rate for the rest. Your short-stay rate and peak-season dates are applied automatically.
2. **Walking** — solo or group, 30-minute or 1-hour, picked from the walk type and times. Priced per pet.
3. **Sitting, grooming, taxi, equine** — your per-visit / per-session rates; equine can be priced by the hour from the times.
4. Agreed something different? Just **type your own figure** into Amount due — your number always wins.

DESKTOP VIEW



The orange note always shows the sum behind the price.

MOBILE VIEW



The same helpful note appears on a phone.

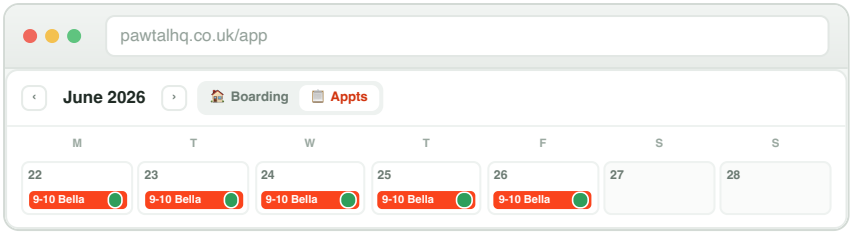
Where do the rates come from? The prices you entered in ⚙ **Business settings**. Update them any time — new bookings use the new rates; existing bookings keep the price they were made at.

14 Booking the same visit on several days

Need to walk Bella at 9 o'clock *every day* next week? You don't have to make five bookings — make one and give it a date range.

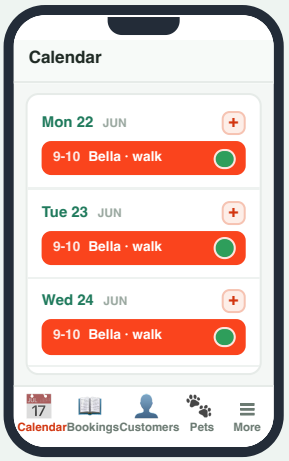
1. Create an appointment as normal (Task 12).
2. Set the **Start** to the first day — say Monday at 09:00.
3. Set the **End** to the *last* day at the finishing time — say Friday at 10:00.
4. That one booking now happens 9–10 **every day Monday to Friday**. It shows on each of those days, and the price is your daily price × 5.

DESKTOP VIEW



One booking, five days: Bella's 09:00 walk shows Monday to Friday.

MOBILE VIEW



On a phone the month becomes a day-by-day list — the repeated walk shows on each day.

On a phone…

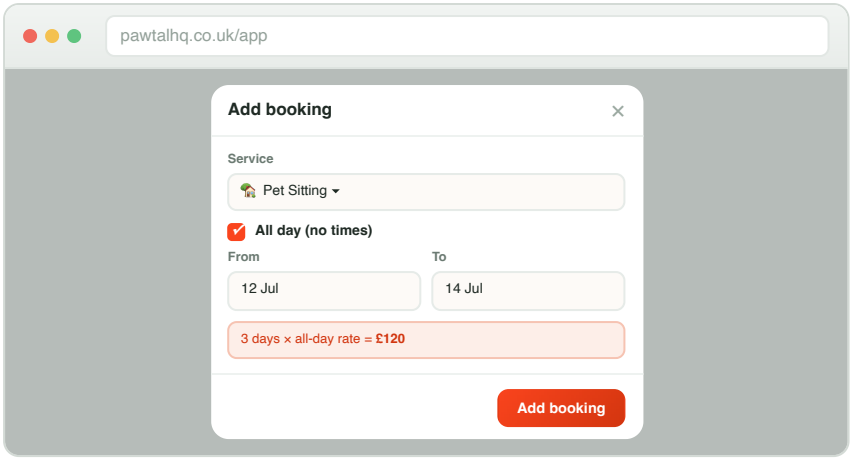
The month grid is replaced by a scrolling **day-by-day list (an "agenda")** — one heading per day with its bookings underneath. It's the same information, just easier to read on a tall, narrow screen. Tap the **+** on any day to add a booking to it.

15 The "All day" option

Pet Sitting and Equine Services can be booked for the whole day at your all-day rate — no clock times needed.

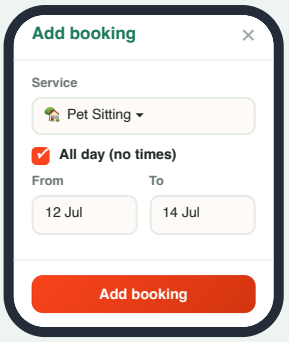
1. Create a booking and choose **Pet Sitting** or **Equine Services**.
2. Tick **All day (no times)**. The Start/End boxes change from date-and-time to simple dates, labelled **From** and **To**.
3. **To** starts equal to **From** — a one-day booking. Set **To** later for a run of days, each charged at your per-day rate.
4. Click **Add booking**. On the calendar it shows as "all day" instead of a time.

DESKTOP VIEW



*All day ticked: the time boxes become simple **From / To** dates.*

MOBILE VIEW



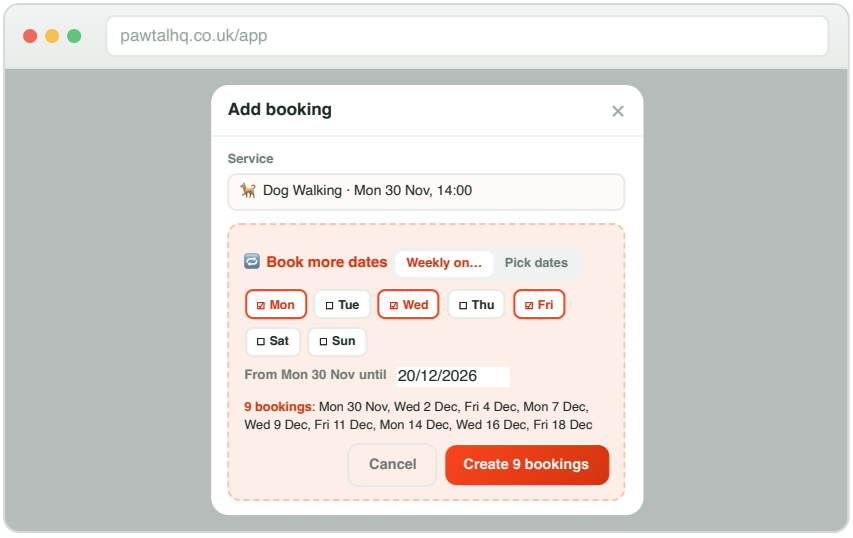
*Works the same on a phone — tick **All day**, pick From and To.*

16 The same booking on many dates

Regulars rarely book one visit at a time — five days a week, set days, a month or two in one go. 🔁 **Book more dates** creates the whole lot from one form, as a **series**.

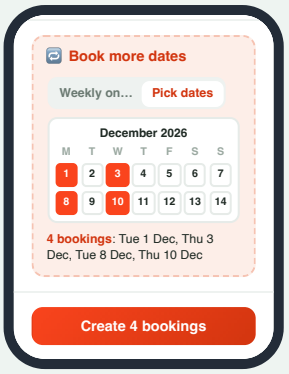
1. Fill in the booking form for the **first** visit as normal — service, customer, pets, date and time (or slot).
2. Click 🔁 **Book more dates** at the bottom of the form.
3. **Weekly on…** — tick the days of the week (the first visit's day is already ticked) and set the **until** date. Five days a week is Mon–Fri; set days is whichever you tick.
4. Or **Pick dates** — tap any dates you like on the calendar instead, for flexi customers or a month booked in one go.
5. The panel lists exactly what it will create — and leaves out any day you're on holiday. Click **Create N bookings**.

DESKTOP VIEW



Mon, Wed and Fri until 20 December: the panel lists the nine dates it will create before you click.

MOBILE VIEW



Pick dates on a phone: tap the days you want and the panel counts them up.

What you get. One booking per date, linked together as a series — so each visit can still be paid, changed or cancelled on its own, and any stretch of them can be invoiced in one go (Task 24). The customer gets **one** confirmation email listing every date, and auto billing (Task 25) raises **one** deposit for the lot and bills the balance once for the whole series.

Changing or cancelling a series. Open any booking in it and the form says “Part of a series of 9”. **Save** and **Delete** then ask whether to apply it to **this booking only**, **this and the later ones**, or **the whole series** — change the time once and every later visit follows; cancel from a date onwards in one go.

On the free trial every date counts towards your 10 free bookings, so the panel tells you how many will fit; the rest can be created once you subscribe.

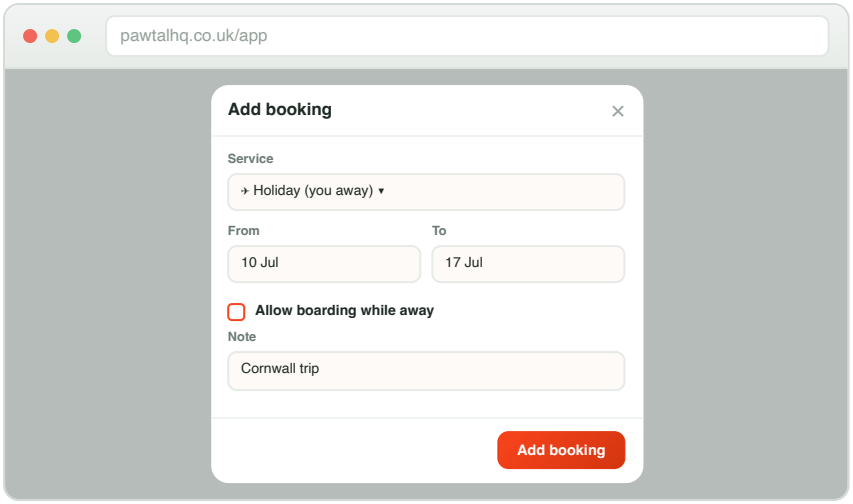
17 Booking your own holiday

You need time off too! A **Holiday** booking blocks out your dates so you can’t accidentally take bookings while you’re away — and your availability page shows those dates as taken.

1. Click 📖 **Bookings** → **+ Add booking**.
2. In **Service**, choose **Holiday (you away)** — always the last option.
3. The form slims down: no customer, no pets, no money — just **From** and **To** dates.
4. **Allow boarding while away** — leave *unticked* to close the whole business. Tick it if pets already boarding can stay but you don’t want any appointments.

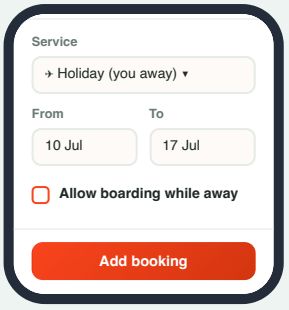
5. Add a note like “Cornwall trip” and click **Add booking**. It shows as a grey ✈ bar and those dates leave your availability.

DESKTOP VIEW



The Holiday form — just dates, the boarding choice and a note.

MOBILE VIEW



Same slimmed-down form on a phone.

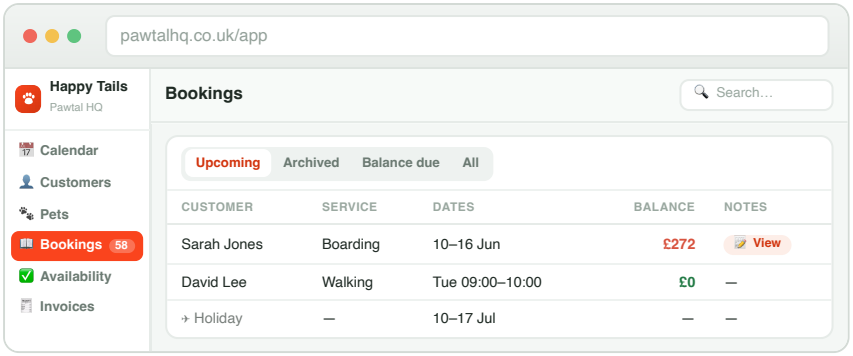
Holidays are free in every sense: they never lock and never count towards the kept-active booking allowance if your trial or licence ever lapses.

18 Finding a booking in your list

The **Bookings** page is the master list of everything — with quick filters to find what you’re after.

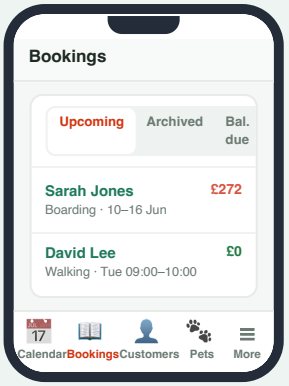
1. Click 📖 **Bookings** in the menu.
2. Use the buttons across the top: **Upcoming** (today onwards — what you see first), **Archived** (finished), **Balance due** (who still owes you), **All**.
3. **Start** and **End** show the time as well as the date for anything booked to a clock, so two grooms on the same day are told apart at a glance. All-day bookings and holidays show the date only.
4. The **Balance** column shows what’s outstanding in red, so “who still owes me?” is one click; 📝 **View** under **Notes** opens a booking’s notes.
5. Sort by any column, search from the top bar, and click any row to open the booking.

DESKTOP VIEW



The bookings list: filters along the top, money and notes on the right, holidays marked ✈.

MOBILE VIEW



The filter buttons can be swiped sideways; each booking is a stacked card.

📱 On a phone…

The row of filter buttons (**Upcoming · Archived · Balance due · All**) can be scrolled sideways if they don’t all fit. As with every list, rows become stacked cards.

PART 4

Calendars & availability

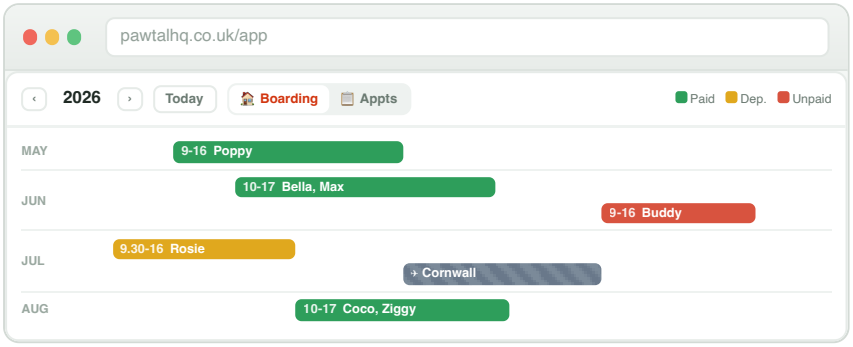
See your bookings at a glance — and answer “have you got space?” in one look.

19 The boarding calendar

The boarding calendar shows your whole year at a glance — every month is a row, every stay is a bar stretching across its dates.

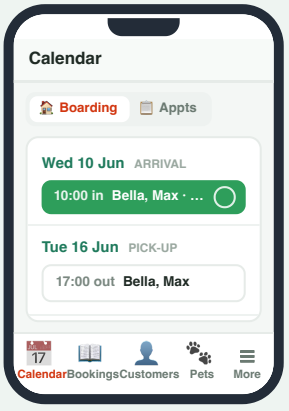
1. Click 📅 **Calendar**. If you offer boarding plus other services, make sure 🏠 **Boarding** is selected at the top.
2. At the start of each bar are the **drop-off and pick-up times** as a range — **10 - 17** means dropped at 10:00, collected at 17:00. The pets’ names follow.
3. The bar’s colour is the payment status: **red** = nothing paid · **amber** = deposit · **green** = paid in full. Grey hatched ✈ bars are your holidays.
4. Use ‹ › to change year and **Today** to jump back. **Click any bar** to open that booking, or **click a free day** to start a new stay arriving then.

DESKTOP VIEW



Each bar shows the drop-off–pick-up times then the pets’ names; the colour is the payment status. The grey ✈ bar is a holiday.

MOBILE VIEW



On a phone the year-planner becomes a day-by-day list showing arrivals and pick-ups.

📱 On a phone…

The wide year-at-a-glance planner doesn’t suit a narrow screen, so phones show the same stays as a scrolling **day-by-day list** instead — you’ll see each arrival and pick-up on its day. Every day is listed: a free day is one slim line — tap it to start a stay arriving then — and the orange **+** bottom-right adds a booking from anywhere.

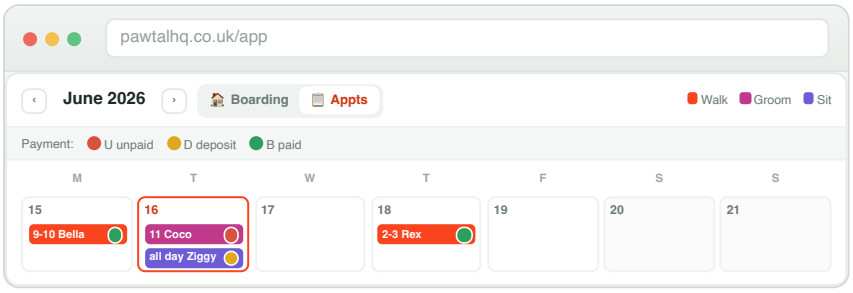
Weekends are tinted and each date shows its weekday underneath, so counting the days of a stay across a weekend is easy.

20 The appointments calendar

Walks, grooms, sits, taxi runs and equine visits live on a familiar month-grid calendar, one chip per visit.

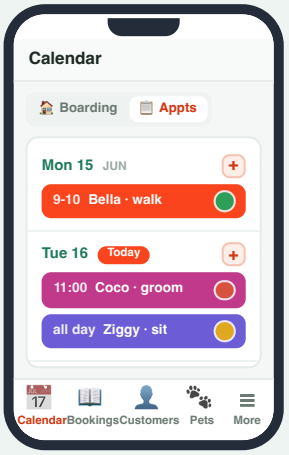
1. Click 📅 **Calendar**, then the 📋 **Appointments** button.
2. Each chip starts with the **time** as a range (10:00–12:00 reads **10 - 12**); all-day bookings say **all day**. The pet's name follows.
3. The chip's **colour is the service** (blue Walking, pink Grooming, purple Sitting, orange Taxi…). A **colour key** top-right lists yours.
4. A small **circle on the right is the payment status**: **U** unpaid (red), **D** deposit (amber), **B** balance paid (green).
5. **Click a chip** to open it — or **click an empty day** to start a new appointment on that date (at 09:00, ready to change).
6. Want a particular time? Click the **day number** — or switch **Month / Day** at the top — for the **Day view**: the day as hour rows. Click a free row to start a booking at that hour (the lower half of a row gives half past); bookings sit in their rows with their times, and clicking one opens it.
7. On a **Morning / Lunch / Afternoon** business (Task 4) each day shows its three slots instead of chips with times — click a slot to book it.

DESKTOP VIEW



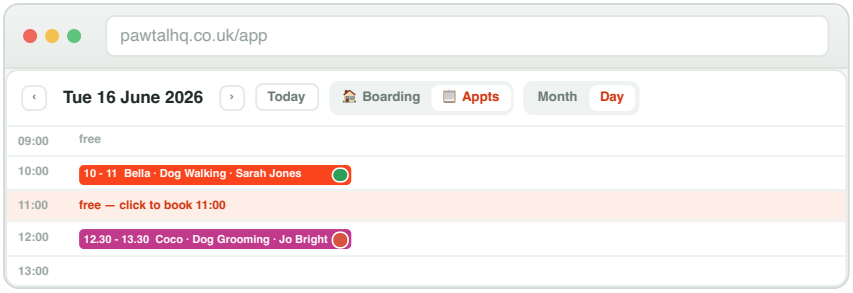
Each chip is coloured by its service (see the key), with a payment circle — U / D / B — on the right.

MOBILE VIEW



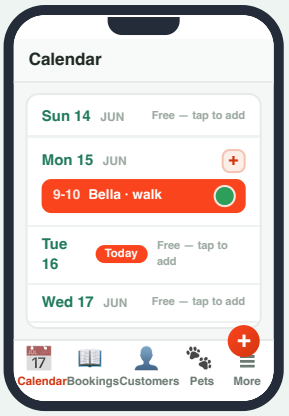
The month grid becomes a day-by-day agenda — same colours, same U/D/B circles.

DESKTOP VIEW — THE DAY VIEW



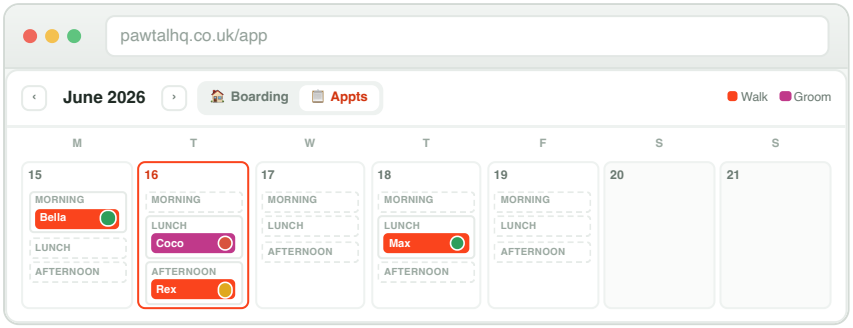
The Day view: one row per hour. Click a free row to start a booking at that time — the 13:00 row isn't marked free because Coco's groom runs into it.

MOBILE VIEW — FREE DAYS



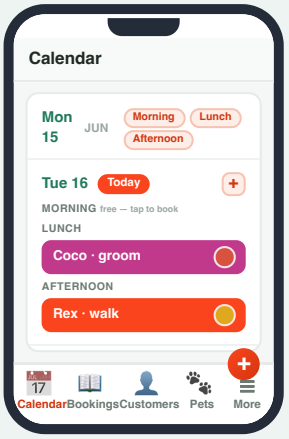
Phones list every day: a free day is one line — tap it to book that date — and the orange + adds a booking from anywhere.

DESKTOP VIEW — MORNING / LUNCH / AFTERNOON



On slots, every day is three rows — Morning, Lunch, Afternoon. Click a row to book that slot; chips show the pet and the payment circle, never a time.

MOBILE VIEW — MORNING / LUNCH / AFTERNOON



On a phone every day is listed. A free day is one line with Morning / Lunch / Afternoon buttons; the orange + adds a booking from anywhere.

On a phone…

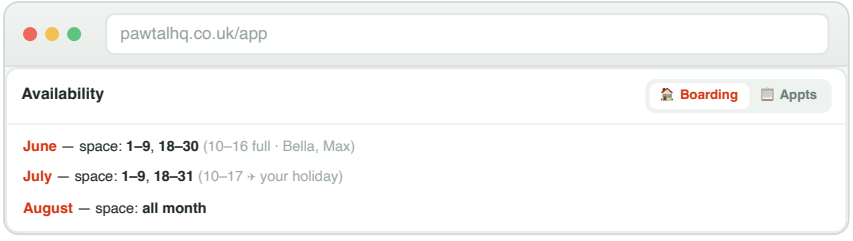
Instead of a 7-day grid you get the **agenda list** again — every day of the month, each with its coloured chips underneath. A day with nothing on is a single line: tap it to start a booking on that date (on slots, tap the Morning, Lunch or Afternoon you want), and the orange **+** bottom-right adds a booking from anywhere. The service colours and the U/D/B payment circles are exactly the same. (The colour key is hidden to save space, and the hour-by-hour Day view is a desktop thing.)

21 Checking your availability

"Have you got space the second week of July?" The **Availability** page answers that phone call instantly.

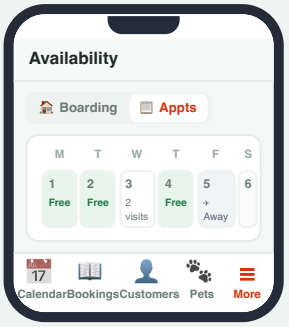
1. Click ✅ **Availability** in the menu.
2. **Boarding view** — the whole year, listing the runs of dates where you still have room. It counts pets against your **Max pets at once**, and your holidays are taken out automatically.
3. **Appointments view** — a month grid where free days are highlighted **Free**, busy days show how many visits, and holiday days show ✈ **Away**. On a Morning / Lunch / Afternoon business each day lists its three slots as **free** or **booked**.
4. Flip between the two with the 🏠 / 📋 buttons. Found a space? **Click it** — a free run of dates, a free day or a free slot — and a booking form opens for that date. **+ Add booking** at the top does the same from scratch.

🖥️ DESKTOP VIEW



Boarding availability: each month lists the date runs with space. July skips your holiday automatically.

📱 MOBILE VIEW



*Appointment availability: **Free** days highlighted, busy days counted, away days marked ✈.*

Online booking lives here too: switch it on and the same availability page becomes a public link you can share, with a “request a booking” button (Task 29). Leave it off and the page stays a private view for you.

PART 5

Invoices

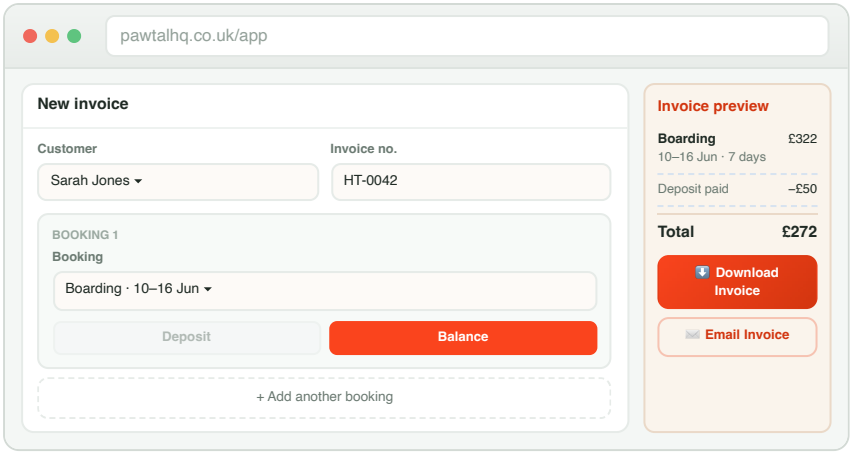
Smart, branded PDF invoices built straight from your bookings — ready to email or print.

22 Creating an invoice

Invoices are built from your bookings and come out as a smart PDF with your logo, address and bank details.

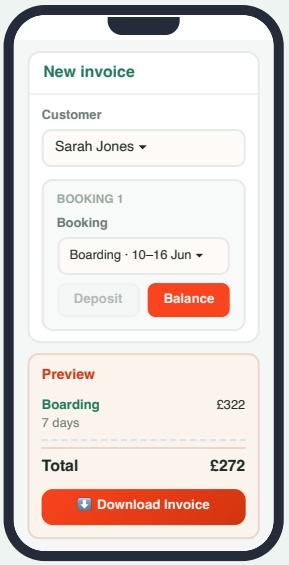
1. Click 🧾 **Invoices**. Choose the **customer** — the invoice number and today's date fill themselves in.
2. Their unpaid bookings are ready to add. The first appears as a card; add more with **+ Add another booking**.
3. For each booking choose **Deposit** or **Balance** (Task 25).
4. Watch the **preview** build itself — every line, the subtotal, deposits taken off, and the total.
5. Finish with ⬇️ **Download Invoice** (saves the PDF) or ✉️ **Email Invoice** (sends it to the customer).

DESKTOP VIEW



Details & bookings on the left; the live preview with the two buttons on the right.

MOBILE VIEW



*On a phone the preview sits **below** the form instead of beside it.*

On a phone…

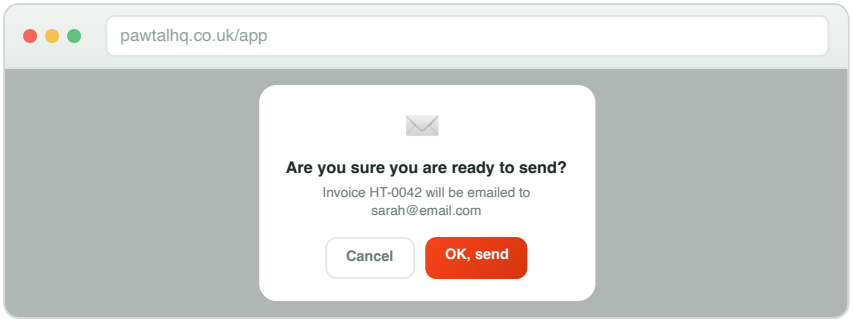
On a computer the form and the live preview sit **side by side**. On a phone there isn't room, so the preview drops to **underneath** the form — scroll down to see it update as you build the invoice.

23 Emailing an invoice to the customer

Pawtal HQ can email the invoice for you, with the PDF attached — no need to download and attach it yourself.

1. Build the invoice (Task 22), then click ✉ **Email Invoice** under the preview.
2. You'll be asked **"Are you sure you are ready to send?"** — click **OK** to send.
3. The customer gets an email from your business with the PDF attached and a short thank-you. Replies go to your own email.
4. You can also email an invoice you made earlier — click **Email Invoice** next to it in **Recent invoices**; its **Status** shows **Emailed** and the date once sent.

DESKTOP VIEW



*A quick "are you sure?" check before it goes — then you'll see **"Invoice sent."***

MOBILE VIEW



The same confirmation pops up on a phone.

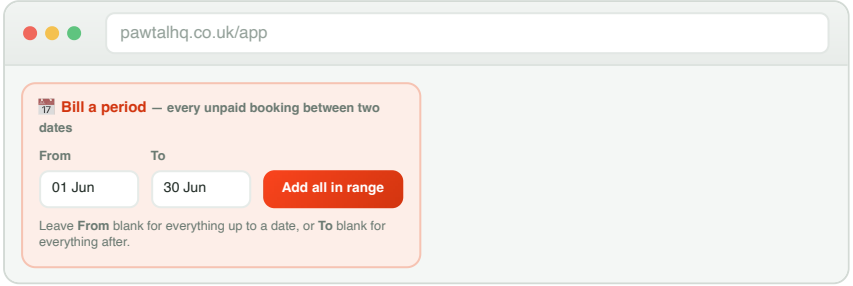
No email on file? You'll see **"No email address for this customer — unable to send."** Add their email on their record and try again — or use **Download Invoice** and send it your own way.

24 Billing a period (e.g. a month of walks)

If a regular builds up lots of small bookings — daily walks, a weekly series — **Bill a period** pulls every outstanding booking between two dates onto the invoice in one click.

1. On the **Invoices** page, choose the customer. The blue 📅 **Bill a period** panel appears.
2. Pick a **From** and **To** date — say the 1st to the 30th of June.
3. Click **Add all in range**. Every unpaid booking in that window lands on the invoice, in date order.
4. Adjust any line if you need, then finish the invoice as usual.

DESKTOP VIEW



One click of "Add all in range" pulls June's stay and every weekly walk onto a single invoice.

MOBILE VIEW



The two dates stack, then a full-width button.

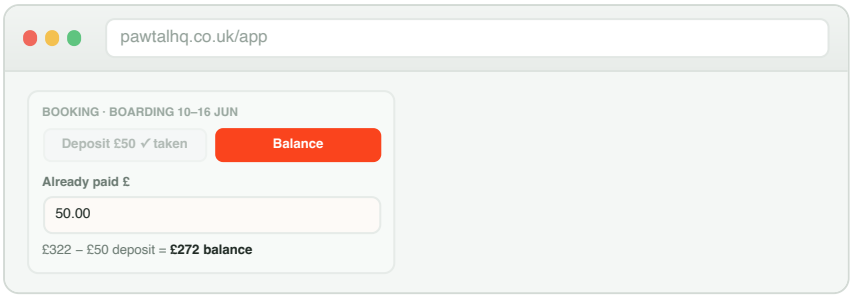
Open-ended works too: leave **From** blank to bill *everything up to* a date, or leave **To** blank for everything from a date onwards.

25 Deposits, balances & auto billing

Every booking line on an invoice is billed one of two ways — together they cover the usual rhythm: **deposit to confirm, balance to settle up**.

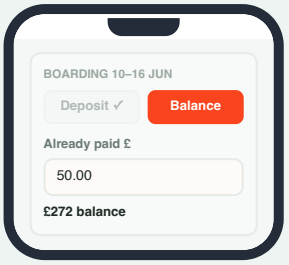
1. **Deposit** — bills just the deposit. It starts at the booking's recorded deposit (or your usual deposit); type over it if you agreed something else.
2. **Balance** — bills the whole booking *minus* what's already been paid.
3. Once a deposit is recorded on a booking, its **Deposit** button greys out — so you can't bill the same deposit twice.

DESKTOP VIEW



*This booking already has its £50 deposit recorded — **Deposit** is greyed out, **Balance** is selected.*

MOBILE VIEW



The two buttons stay side by side; everything else stacks.

One invoice can mix both. A deposit for August's stay and the balance for June's on the same PDF? Perfectly fine — each booking card has its own switch.

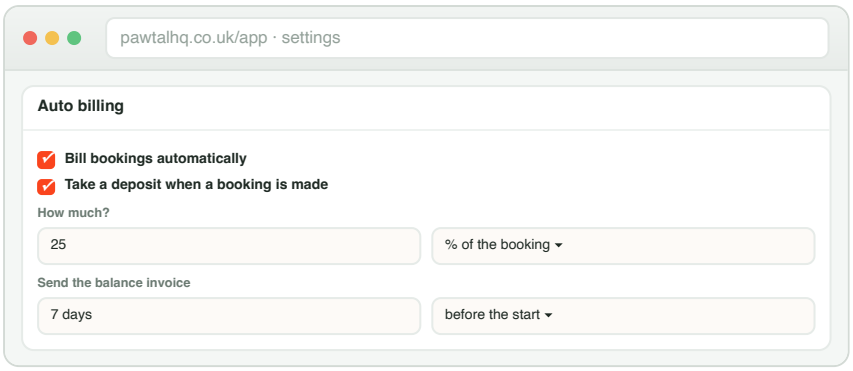
Or let Pawtal HQ bill for you

Switch on **Auto billing** in Business settings and the invoices raise themselves — a deposit when the booking is taken, the balance on the day you choose. Off by default; manual invoicing carries on working either way.

1. Tick **Bill bookings automatically**. To take a deposit, tick **Take a deposit when a booking is made** and say how much — a fixed £ per booking, or a % of it.
2. Choose when the **balance invoice** goes: so many days **before the start** or **after the end**. Click **Save**.
3. From now on, the moment you save a booking the deposit invoice is created and you're asked **"Email the deposit invoice?"** — **Send now** emails it; **Not now** keeps it in Invoices for later.
4. On the due day the balance invoice is emailed by itself each morning, for whatever is still owed. No deposit? Then that is the only invoice, for the full amount. A booking made inside the window gets one invoice for the full amount straight away.

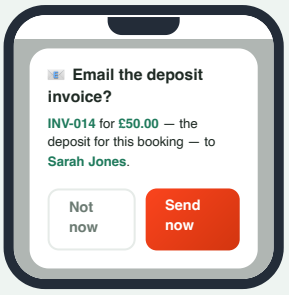
5. To leave a booking out — a regular you bill monthly, a friend — tick **Don't auto-bill this booking** on its form.

DESKTOP VIEW



The Auto billing box in Business settings — a 25% deposit, balance seven days before the stay.

MOBILE VIEW



Save a booking and you're asked before the deposit invoice goes.

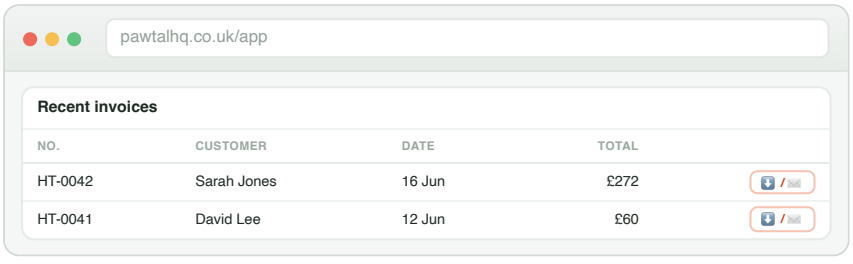
Every auto invoice lands in Recent invoices like any other, marked **Deposit**, **Balance** or **Auto**, with **Emailed** and the date once it has gone — you can still download it, email it again, or raise invoices by hand.

26 Custom charges & re-downloading old invoices

Sometimes you need a line that isn't a booking — a late pick-up fee, food you supplied, a discount. And every invoice you've ever made is kept, ready to download or re-send.

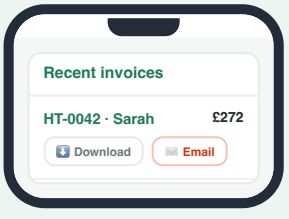
1. **Custom line** — while building an invoice, click **+ Add custom line**, type a **description** ("Late collection — Friday") and an **amount**. The × removes one.
2. **No booking at all?** Build an invoice from custom lines only — handy for one-off sales.
3. **Old invoice** — scroll to **Recent invoices** at the bottom, find it, and click **Download Invoice** (rebuilds the exact PDF) or **Email Invoice**.

DESKTOP VIEW



*Recent invoices — each has **Download Invoice** and **Email Invoice** buttons.*

MOBILE VIEW



Each invoice becomes a card with its own Download / Email buttons.

PART 6

Looking after your data

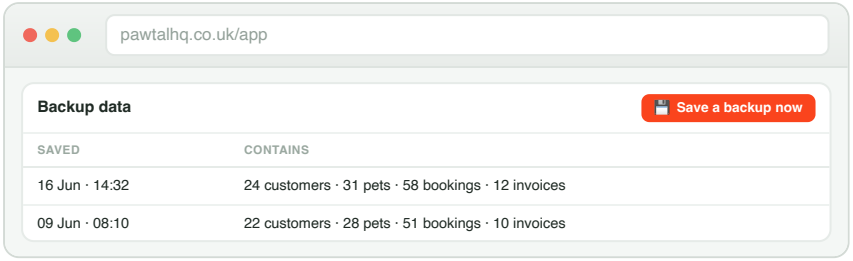
Save a safety copy of everything — and roll back if you ever need to.

27 Backing up your data

A backup is a snapshot of all your customers, pets, bookings and invoices at this moment. One click, a second or two, done.

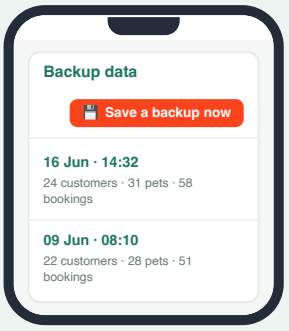
1. Click 💾 **Backup data** in the menu.
2. Click 💾 **Save a backup now**.
3. It appears in the list below with the date, time and exactly what it contains.

🖥 DESKTOP VIEW



One backup saved — date, time and contents listed.

📱 MOBILE VIEW



Same page, one column.

When to back up: before any big tidy-up, and every so often as a habit. Your **10 most recent** backups are kept — saving an 11th quietly removes the oldest. Backups only ever contain *your own* records.

Backup & Restore are owner-only. If you have staff, only you (the owner) see these two menu items.

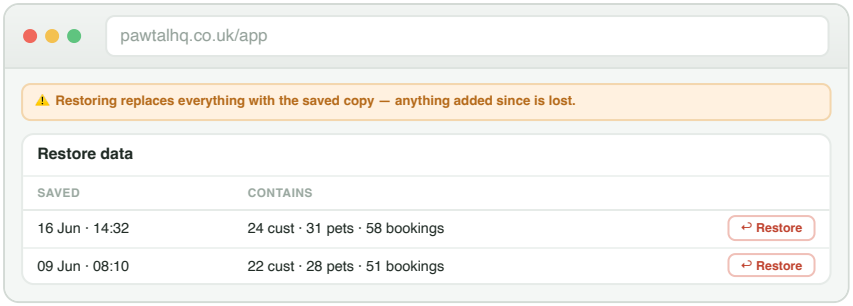
28 Restoring from a backup

Restoring rolls your data back to exactly how it was when a backup was saved. It's the undo button for big mistakes.

1. Click ♻️ **Restore data** in the menu.
2. Find the backup you want — the date and contents help you pick.
3. Click ↩ **Restore** and read the warning carefully.

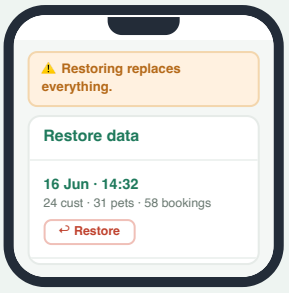
4. Click **OK** to go ahead. Your data is put back exactly as it was, and a message confirms it’s done.

DESKTOP VIEW



The Restore page — note the warning: restoring replaces everything with the saved copy.

MOBILE VIEW



Same list and warning on a phone.

Please read twice: restoring **replaces all** of your current data with the backup. Anything added since is lost, and a restore cannot be undone. If in doubt, save a fresh backup first — then you can even undo the restore itself.

PART 7

Let customers book you online

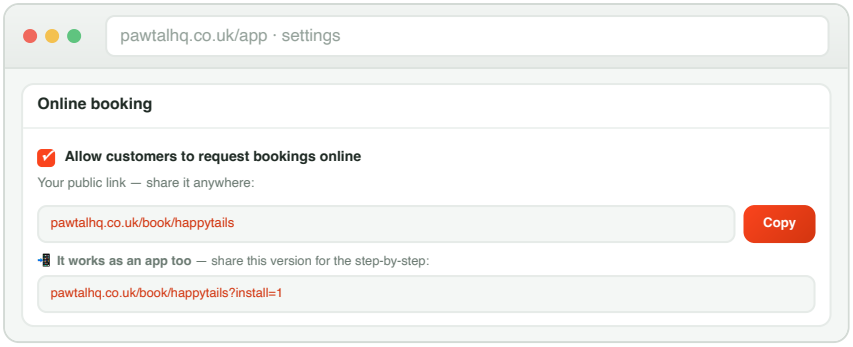
Give people a link so they can ask to book you, day or night — you still approve every one.

29 Turning on online booking

Give customers a link so they can ask to book you, day or night. You still approve every request — you stay in control.

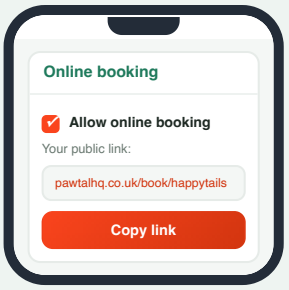
1. Click ⚙️ **Business settings**.
2. Find the **Online booking** box and tick **"Allow customers to request bookings online."**
3. Click **Save**. Your personal booking link appears — copy it and share it on your website, Facebook or in emails.
4. Your link is an **app** too: a customer who opens it on their phone is offered **Add to home screen**, and your booking page then sits on their phone as a tile with your logo (upload one in Business settings). The **step-by-step link** shown under your booking link opens those instructions straight away — share it with anyone who asks.
5. **Terms and conditions** — with terms in Business settings (Task 4), the page shows them and nobody can send a request without ticking that they agree. The request arrives marked ✓ **T&Cs agreed**, and accepting it records the agreement on their customer record.
6. **Several dates at once** — for anything but a boarding stay the page asks **How many visits?**: just the one, **the same days every week** until a date, or **pick dates on a calendar** — up to 60 in one request.

DESKTOP VIEW



Switch on online booking and share your public link.

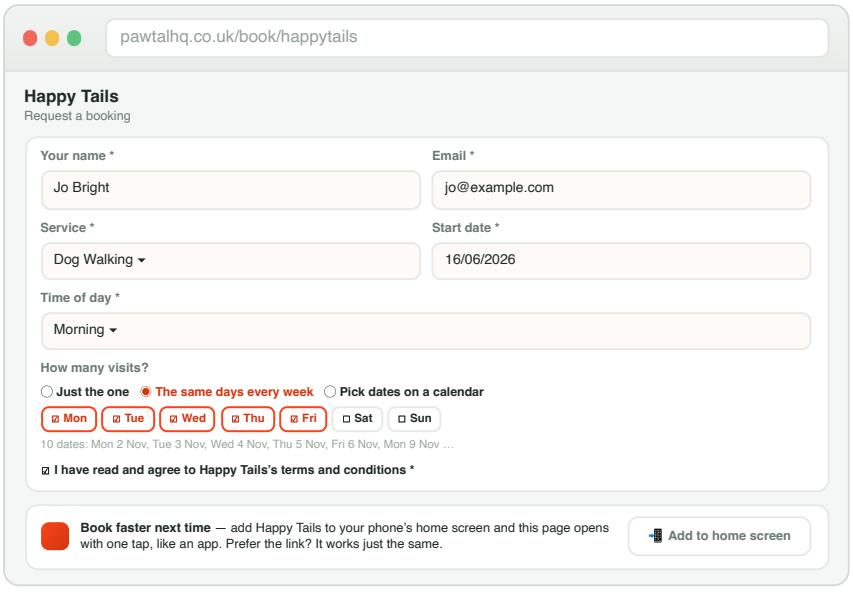
MOBILE VIEW



Same switch and link on a phone.

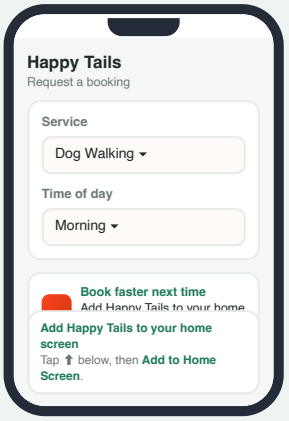
Times, slots and gaps. For anything that isn't boarding, your booking page asks the customer for a **start time** (and an end time if they know it — otherwise about an hour is assumed) — or, if you're on **Morning / Lunch / Afternoon** (Task 4), simply which **time of day** they'd like. If you've given that service a **gap between bookings** (Task 4), a request that lands inside a gap is turned away politely with the next free time — *"the earliest you can book after it is Thu 8 Oct at 1:00pm"* — and nothing about your other customers is shown. Requests that clear the check still come to you to approve, as always.

YOUR CUSTOMER'S COMPUTER



*The public booking page on a computer: a time of day (on a slots business), **How many visits?** with the weekdays ticked, the terms tick, and the app card underneath.*

YOUR CUSTOMER'S PHONE



What a customer sees on their phone: the Morning / Lunch / Afternoon choice (on a slots business), the "Add to home screen" card, and the one-time hint.

📲 **Your booking link is an app too.** Opened on a phone, a small card offers to **add it to the home screen**: on Android it installs with one tap; on an iPhone, Apple only allows this through the Share button, so the page shows the three steps (Share → Add to Home Screen → Add). Either way the customer gets a tile with your name and logo that opens straight onto your booking form — nothing to download from an app store — and the ordinary link still works for everyone else, computers included.

Included from day one: online booking is part of the one plan, and it works during your

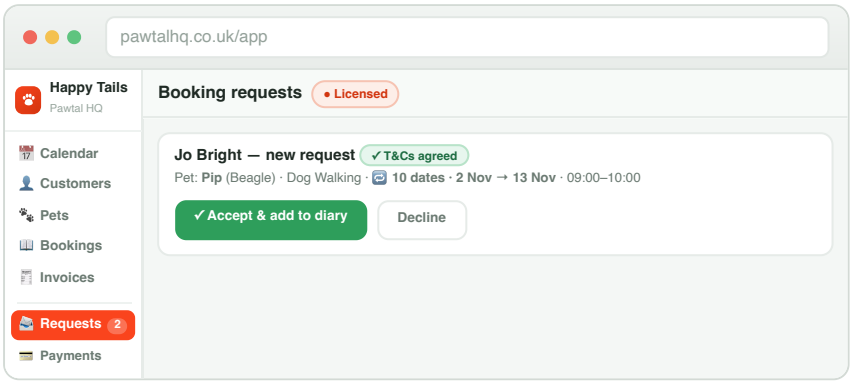
free bookings too — so what you try is exactly what you keep.

30 Saying yes (or no) to booking requests

When someone books online you get an email, and the request appears in your menu — ready to approve. Accepting opens a booking form that's already filled in for you.

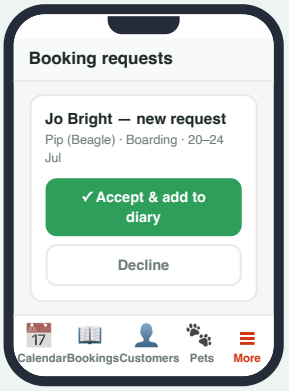
1. When someone books online, you get an **email**, and it appears under 📨 **Booking requests**.
2. Open **Booking requests** to see who, which pet, and the dates — and the time, or the Morning / Lunch / Afternoon slot, where the customer chose one. A request for several dates says so (🔁 **10 dates · 2 Nov → 13 Nov**, with the list a click away), and **✓ T&Cs agreed** shows they ticked your terms.
3. Click **✓ Accept & add to diary** — a ready-filled **booking form** opens: the customer, their pet, the date and any time or slot are already in place, and the price is worked out from your rates. For several dates, **Book more dates** opens with them already picked — click **Create N bookings** and the whole lot goes in the diary as a series (Task 16).
4. Check it over — tick extra pets if the whole family is coming — then click **Add booking** (if it sits too close to another booking you get the same gap warning as for any booking — Task 12). Change your mind? **Cancel** and the request stays in your inbox. Not right at all? Click **Decline** instead.

🖥️ DESKTOP VIEW



*Accept opens a ready-filled booking form — check it, click **Add booking**, and it's in the diary.*

📱 MOBILE VIEW



*Requests live under ≡ **More** on a phone; buttons stack full-width.*

📱 **On a phone…**

📨 **Booking requests** isn't one of the five bottom buttons, so tap ≡ **More** to find it. You'll also get an email each time, so you'll never miss one.

PART 8

Getting paid by card

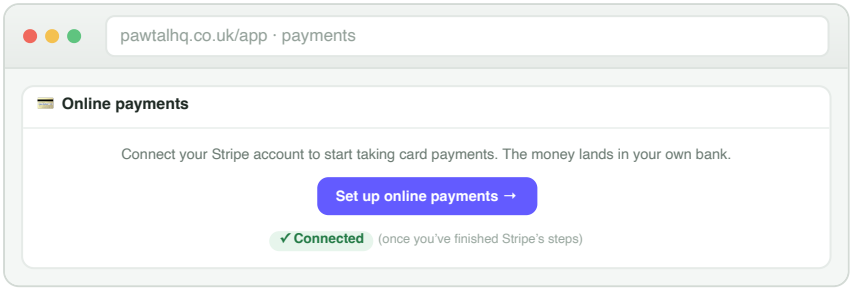
Let customers pay deposits or balances by card — the money goes straight to your own account.

31 Taking card payments

Let customers pay deposits or balances by card. The money goes straight into your own account.

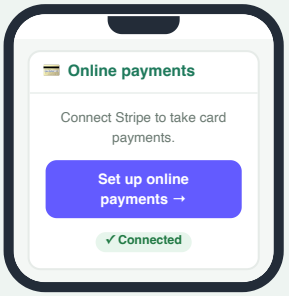
1. Click 💳 **Online payments**, then **Set up online payments**.
2. You'll be taken to **Stripe** (the secure payment company) to connect or create your account. Follow their steps — it takes a few minutes.
3. When it says **"✓ Connected,"** you're ready. A "Pay online" link is added to your booking confirmation emails automatically.

🖥 DESKTOP VIEW



Connect your Stripe account to start taking card payments.

📱 MOBILE VIEW



The same one-button set-up on a phone.

What it costs: Stripe takes their small card fee, and Pawtal HQ takes just **1%**. Everything else is yours.

PART 9

Messages that send themselves

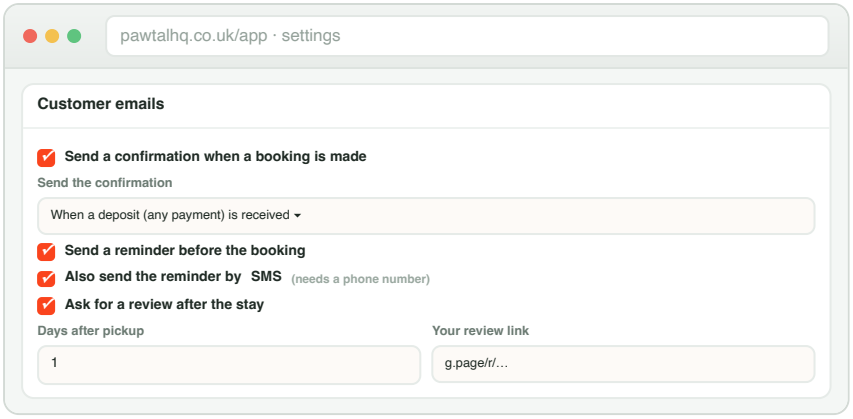
Let Pawtal HQ do the chasing for you — turn on as many or as few as you like.

32 Confirmations, reminders & review requests

Let Pawtal HQ do the chasing for you. Turn on as many or as few as you like.

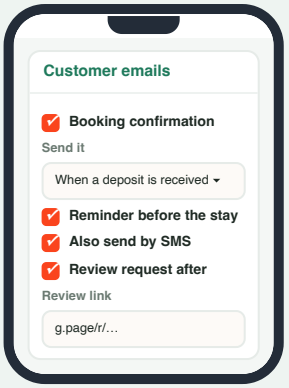
1. Click ⚙️ **Business settings** and find the **Customer emails** box.
2. Tick what you want: a **confirmation** when a booking is made, a **reminder** before the stay, and a **review request** afterwards.
3. Choose **when** the confirmation goes out: as soon as the booking is **entered**, when a **deposit** (any payment) is received, or only when the booking is **paid in full** — ideal if a stay only counts as booked once the money arrives. Recording the payment on the booking, or the customer paying online, both count.
4. To send reminders by **text message too**, tick **“Also send the reminder by SMS.”** (The customer needs a phone number saved.)
5. For review requests, paste your review link (e.g. your Google reviews page). Click **Save**.

DESKTOP VIEW



Choose which automatic messages to send — including SMS reminders.

MOBILE VIEW



Same tick-boxes, stacked for a phone.

Tip: reminders are brilliant for cutting no-shows, and the review request is sent at the perfect moment — just after a happy stay.

One stay needs a different rule? Every booking form has its own **Confirmation email** box (just under the payment fields) that overrides your account setting — so your Christmas stays can wait for the **full balance** while everything else confirms on deposit. Each booking only ever gets its confirmation once.

Email and SMS are both included: confirmations, reminders and review requests all work during your free bookings as well as on a subscription — there is nothing extra to buy.

PART 10

Bringing your list in

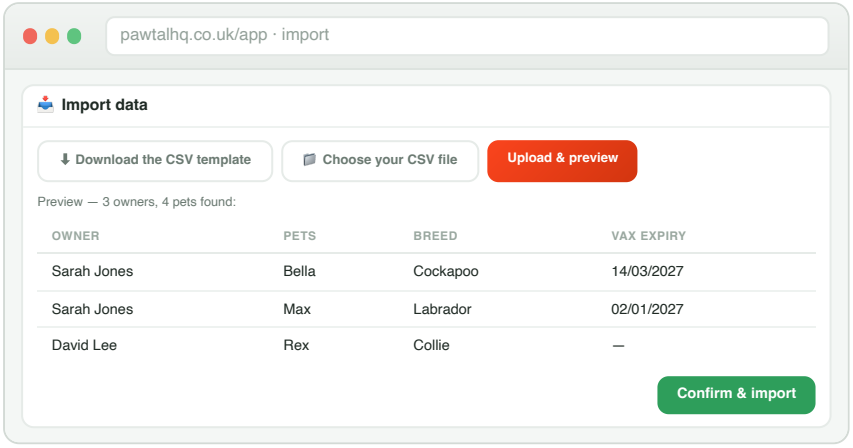
Already have a list of customers and pets? Bring them all in at once instead of typing them.

33 Importing from a spreadsheet

Already have a list of customers and pets? Bring them all in at once instead of typing them one by one.

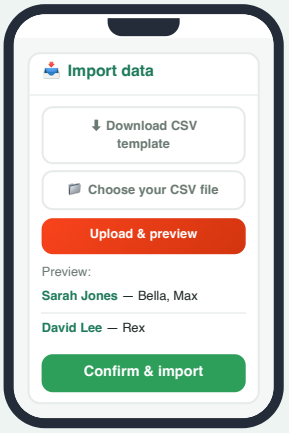
1. Click 📥 **Import data** in the menu.
2. Click **Download the CSV template** and fill it in (one row per pet — repeat the owner's details if they have more than one).
3. Click **Choose your CSV file**, pick your filled-in file, then **Upload & preview**.
4. If your spreadsheet didn't say what kind of animal each pet is, you'll be asked to choose — **Dog**, **Cat**, **Horse** or **Other**. It only applies to the rows that didn't say; any row naming its own species keeps it. Pawtal HQ won't guess for you.
5. Check the preview looks right, then click **Confirm & import**. Done!

🖥️ DESKTOP VIEW



Bring your customers and pets in from a spreadsheet — check the preview, then import.

📱 MOBILE VIEW



The buttons stack; the preview becomes a short list.

Tip: dates can be UK style (31/12/2026) or 2026-12-31 — both work.

PART 11

Your team

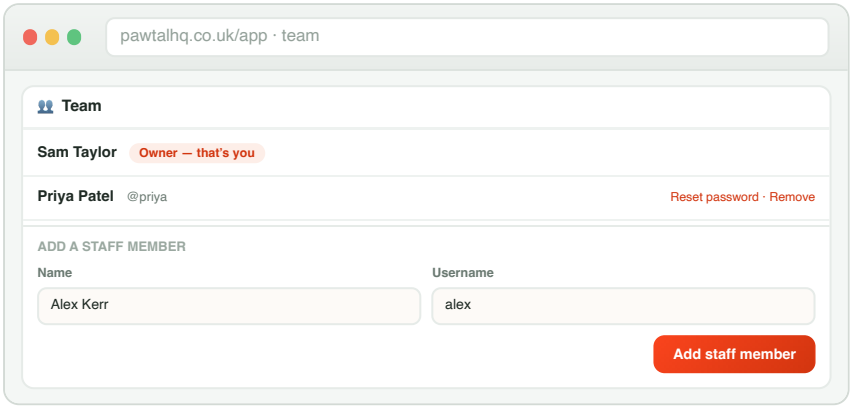
Give each person who works with you their own login — and decide who sees what.

34 Adding your staff

Got people helping you? Give them their own login so they can see the diary and add bookings — without sharing your password. There's **no extra charge**: one licence covers your whole team.

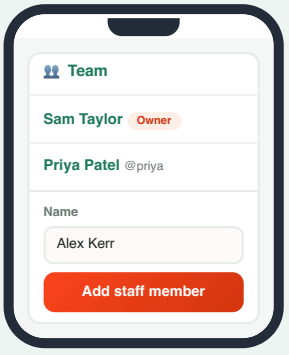
1. Click 👥 **Team** in the menu. (Only you, the owner, can see this.)
2. Under **Add a staff member**, type their **name**, a **username**, and a **password** (at least 8 characters, typed twice). Click **Add staff member**.
3. They can log in straight away at **pawtalhq.co.uk/app** on their own phone or computer.
4. To change someone's password later, click **Reset password**; to remove them, click **Remove**.

DESKTOP VIEW



The Team page: you (the owner) at the top, then each staff member with their own login.

MOBILE VIEW



Same page on a phone — found under ≡ More → Team.

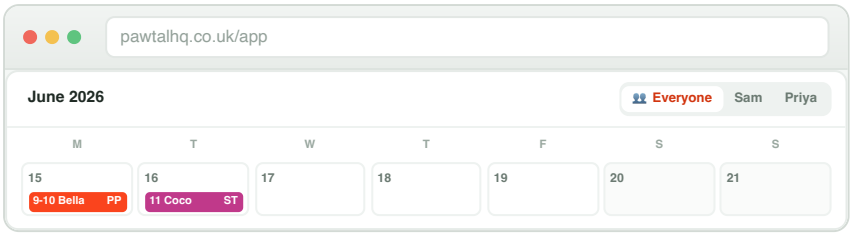
What can staff do? All the everyday work — calendars, customers, pets, bookings and invoices. The owner-only things stay with you: **Business settings, billing, the Team page, and backup & restore**. Each staff member can set their own password and two-step verification.

35 Assigning jobs & filtering your diary

Once you've got a team, you can give each booking an owner so everyone knows who's doing what.

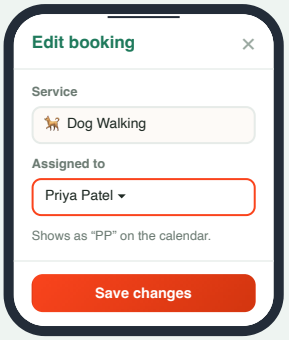
1. When you **add or edit a booking**, use the **Assigned to** box to choose a team member (or leave it **Unassigned**).
2. On the calendar, each booking shows that person's **initials**, so you can see who's on what.
3. Use the 👥 **Everyone** filter at the top of the diary to show just one person's jobs — handy for planning someone's day.

DESKTOP VIEW



Each booking shows the person's initials; the filter shows just one person's jobs.

MOBILE VIEW



Pick who's doing the job in the "Assigned to" box on any booking.

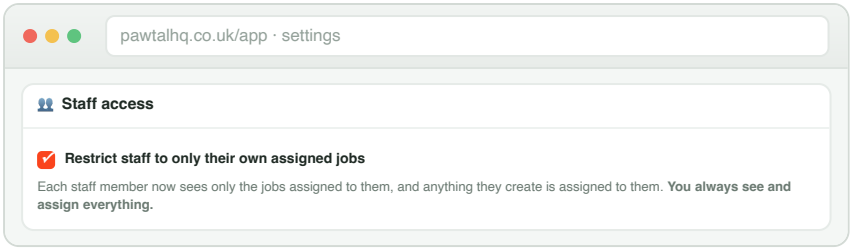
Just you? The "Assigned to" box and the staff filter only appear once you have more than one person on the team — so a one-person business never sees the extra clutter.

36 Staff access — who sees what

By default, your staff can see and manage **every** booking. If you'd rather each person only saw their own jobs, you can switch that on.

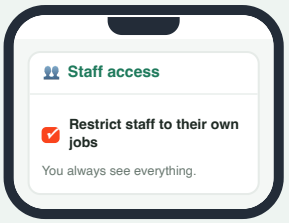
1. Click ⚙️ **Business settings** and find 👥 **Staff access**.
2. Tick **"Restrict staff to only their own assigned jobs."**
3. Click **Save**.

DESKTOP VIEW



Choose whether staff see the whole diary or only their own jobs.

MOBILE VIEW



One tick — the same on a phone.

Leave it unticked if you'd like everyone to help manage the whole diary. The owner (you) always sees and assigns everything, either way.

PART 12

Your licence & account

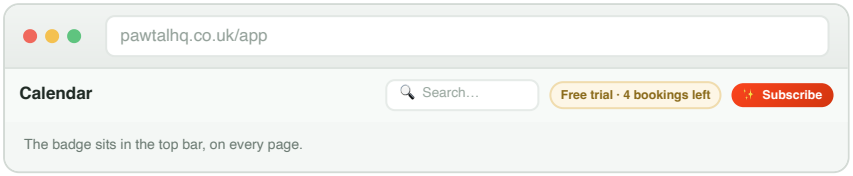
Your free trial, choosing a plan, and keeping your account safe.

37 Your free trial

Every new account starts with your first **10 bookings free** — no card needed, and no expiry date. Customers and pets are unlimited from the start, every feature is switched on, and nothing is ever charged automatically.

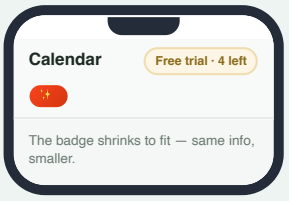
1. The badge at the top-right shows where you stand — for example **Free trial · 4 bookings left**.
2. Add as many customers and pets as you like — those are never limited. Only **bookings** count towards your 10, so put your real diary in it.
3. When you're ready, click ✨ **Subscribe** next to the badge (Task 39). Need a few more free bookings to be sure? Just ask via Help & support and we'll add some.

DESKTOP VIEW



On the trial: the badge counts down your free bookings, with the Subscribe button alongside.

MOBILE VIEW



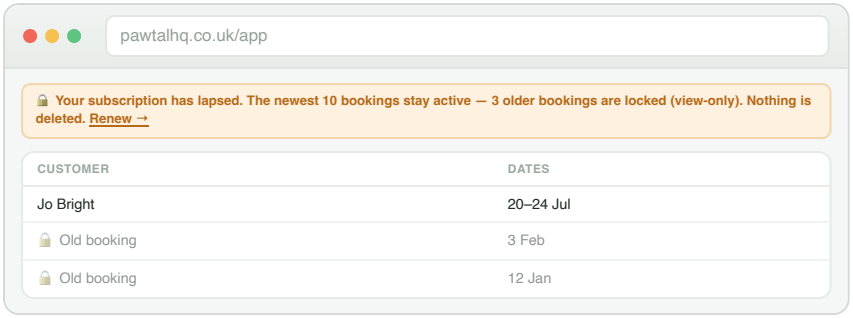
The same badge on a phone — always one glance away.

38 When your free bookings run out

Use up your 10 free bookings and **nothing at all happens to what you have already entered** — nothing is deleted, nothing is locked and nothing is charged. You simply can't add booking number 11 until you subscribe. (If a paid subscription lapses later on, older bookings do go to sleep — that's the case shown below.)

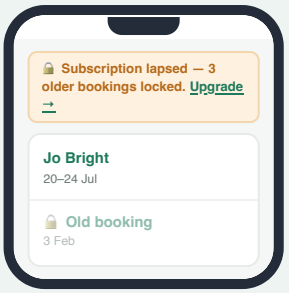
1. If a paid subscription lapses, your **newest 10 bookings stay fully active** — view and edit them as normal.
2. Anything older shows a 🔒 and becomes view-only. A banner across the top explains and counts them.
3. Tick **Hide locked** if you'd rather not see them for now.
4. Renew and everything unlocks instantly — exactly as it was.

DESKTOP VIEW



A lapsed subscription: the banner explains, and older bookings are padlocked until you renew.

MOBILE VIEW



Same banner and padlocks on a phone.

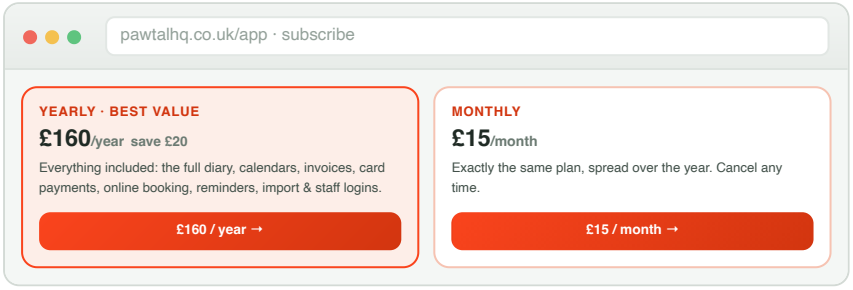
Nothing is ever lost. Locked bookings are just resting — upgrade or renew and they all come straight back exactly as they were.

39 Subscribing (£15 a month or £160 a year)

There is only **one plan**, so there is nothing to compare and nothing held back — the only choice is whether you'd rather pay monthly or yearly. Subscribing lifts the 10-booking limit. You pay securely by card through **Stripe** — Pawtal HQ never sees your card number — and your account unlocks within seconds.

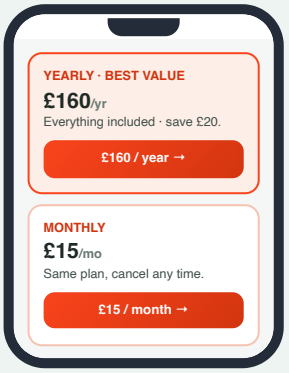
1. Click ✨ **Subscribe** at the top-right (or the link in any trial banner).
2. Choose **£15 a month** or **£160 a year** (the yearly price saves you £20), then pay by card via Stripe. Your account flips to ● **Licensed** straight away.
3. Once paid, **Manage billing** replaces the Subscribe button — see payments, download receipts, update your card, or cancel any time.

DESKTOP VIEW



One plan, two ways to pay it — and one secure card payment by Stripe.

MOBILE VIEW



The two payment options stack on a phone.

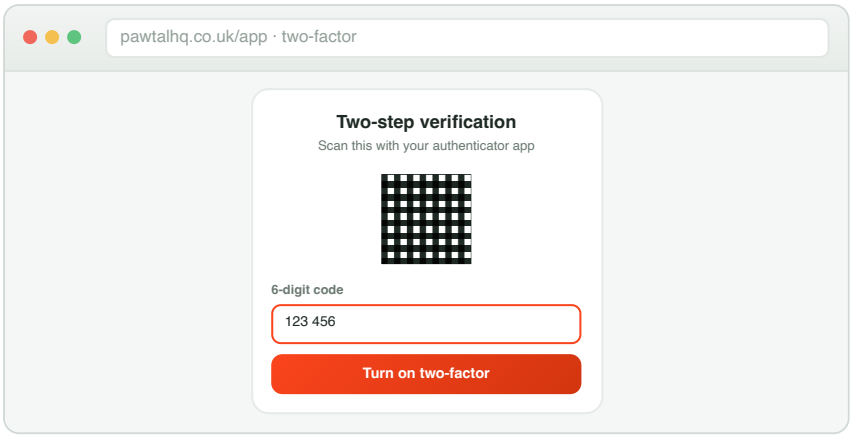
No contract. Cancel any time and your subscription simply runs to the end of the period you've paid for. Nothing is ever deleted, and you can export your data whenever you like.

40 Password & two-step verification

Two ways to keep your account — and your customers' details — safe. Change your password now and then, and add two-step verification (2FA) for a second lock.

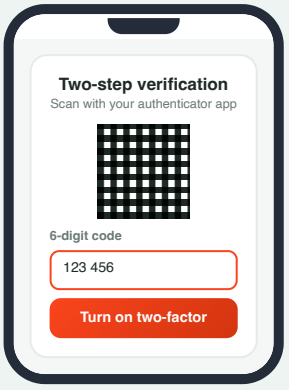
1. **Change password:** click 🔑 **Password**, type your **current** password then your **new** one twice (at least 8 characters), and click **Update password**.
2. **Two-step verification:** install a free authenticator app (Google or Microsoft Authenticator), click 🔒 **Two-factor**, and scan the square barcode with the app.
3. Type the 6-digit code the app shows and click **Turn on two-factor**. Save the **recovery codes** somewhere safe.

DESKTOP VIEW



Scan the square code with your phone's authenticator app, then confirm with the 6-digit code.

MOBILE VIEW



On a phone, you can even scan using the same device — or a second one.

Keep those recovery codes safe. Each one works once, and they're the only way in if your phone is ever lost or replaced.

PART 13

Help when you need it

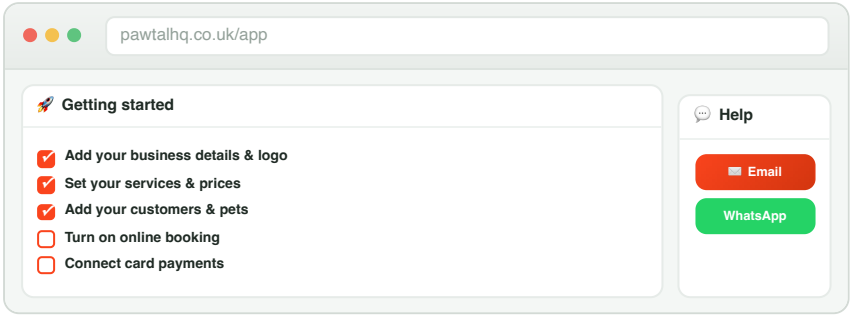
Whatever plan you're on, help is always a click away — there's a real person at the other end.

41 Getting help

Stuck on something? Help is available to **every** Pawtal HQ user, on **any plan** — nobody is left to work it out alone.

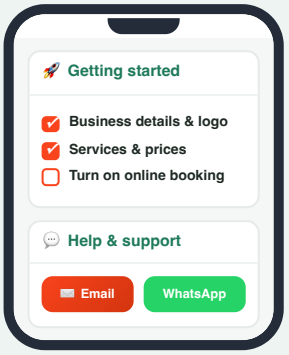
1. **By email** — write to **philip@pawtalhq.co.uk** any time with your question. This works whatever plan you're on.
2. **In the app** — click 💬 **Help & support** in the menu and choose **Email** for detailed questions or **WhatsApp** for quick ones. Tap the button and message us.
3. The **PDF guides** (this User Guide and the Quick Start) are linked on the login page too, so they're always within reach.

🖥️ DESKTOP VIEW



Everyone can reach us via 💬 Help & support (email or WhatsApp), and use the 🚀 Getting started checklist to get set up.

📱 MOBILE VIEW



Both pages live under ≡ More on a phone.

📱 On a phone…

Find 💬 **Help & support** by tapping ≡ **More**. The WhatsApp button opens your WhatsApp app straight away.

🚀 **Getting started tick-list:** everyone gets this too — a checklist in your menu that walks you through set-up and ticks itself off as you go. It shows the steps that apply to *your* plan.

That’s everything!

Remember the golden rule: you can’t break anything, and almost everything can be edited later. Dip in and out of this guide whenever you need a reminder.

Need a hand? 💬 **Help & support** is in your menu, or email **philip@pawtalhq.co.uk** — help is there for every plan.

ONE PLAN · EVERYTHING INCLUDED