

Session Planer

Session Planer – Manual

Schedule, people, billing and online booking – explained step by step

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About this manual

This manual explains every screen, every menu and every setting of Session Planer. The same texts are in the app under the question mark at the top right – there you can search them and jump straight to the right place with “Open”. The pictures show sample data with invented names.

Screenshots from the app with sample data. Photos: Session Planer’s own image library.



CHAPTER 01

Getting started

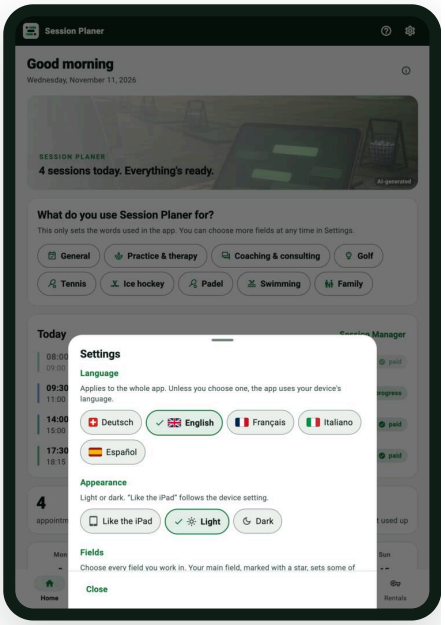
When you open the app for the first time, you agree to the terms, choose your language and fields, and see a short introduction. You can change all of this later.











Consent at first start

Where to find it: First start › Before you start

Before you start working, you read the essentials in brief and tick two boxes: Terms of Use and Privacy Policy. You can open both documents directly.

Without your consent, the app stays closed. It deletes nothing and sends nothing. If there is a new version later, the app asks again.

STEP BY STEP

1. Read “The essentials in brief”.
2. Open the two documents if you need to.
3. Tick both boxes.
4. Tap “Agree and start”.

Introduction

Where to find it: Home › About the app › Watch the introduction again

In a few pages, the introduction shows what the app contains: calendar, people, memberships and packages, online booking, rentals and where your data is stored.

On the last page you choose how you want to begin: bring over data from your previous system, add a person, set up online booking, redeem an invitation from your family, or just look around first.

> **Tip:** You can watch the introduction again at any time – from the “About the app” sheet.

Settings: language, appearance, fields

Where to find it: Gear icon at the top right › Settings

The gear icon at the top right opens the settings. There you choose the language of the app (German, English, French, Italian, Spanish). Unless you choose one, the app uses your device’s language.

Under “Appearance” you choose Light, Dark or “Like the iPad”.

Under “Fields” you choose all the fields you work in, for example Golf, Tennis, Padel or Coaching & consulting. The main field with the star determines words in the app, for example “Match” instead of “On-course session”. One field always stays selected.

“Family” turns a separate tab for family, rides and holidays on or off.

STEP BY STEP

1. Tap the gear icon at the top right.
2. Choose a language – it applies to the whole app straight away.
3. Choose Light, Dark or “Like the iPad”.
4. Tap the fields you work in.
5. If you have several fields: under “Main field”, tap the one that should carry the star.

The tabs at the bottom

Where to find it: Bar at the bottom

At the bottom are the tabs Home, Sessions, People, Notes, Billing and Rentals. If Family is turned on, a seventh tab, “Family”, is added.

On iPhone with seven tabs, only the selected tab shows its name; the icons still carry their names for VoiceOver.

Read-only mode without a subscription

Where to find it: Home › Subscription

Creating and editing are part of the subscription. Without an active subscription, the app is in read-only mode: your schedule, your people and all entries stay fully readable. Exporting and deleting all data work at any time. Nothing is locked away or removed.

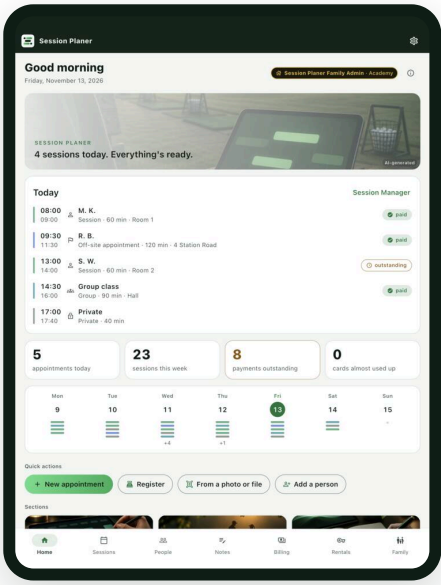
Where something belongs to a higher tier, the app explains it in three parts: what applies, what the app does and what you can do.

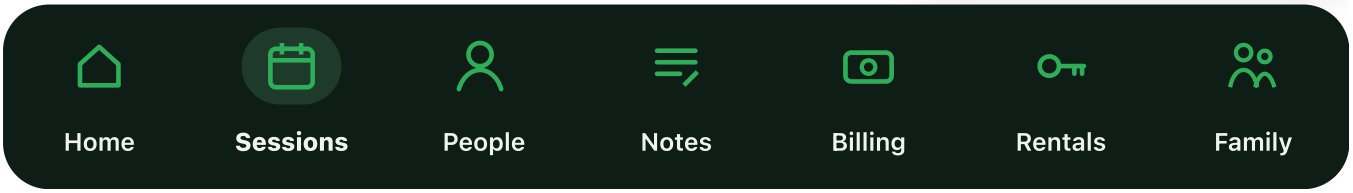


CHAPTER 02

Home

The home screen shows your day at a glance and leads into every area of the app with a tile.





Greeting, key figures and Today

Where to find it: Home

At the top are a greeting and a sentence about the day. Below them are key figures: appointments today, sessions this week, outstanding payments, overdue rentals and cards that are almost used up.

The “Today” block lists the day’s appointments with time, duration and whether they are paid or outstanding. If nothing is planned today, it shows the next appointment.

Quick actions

Where to find it: Home › Quick actions

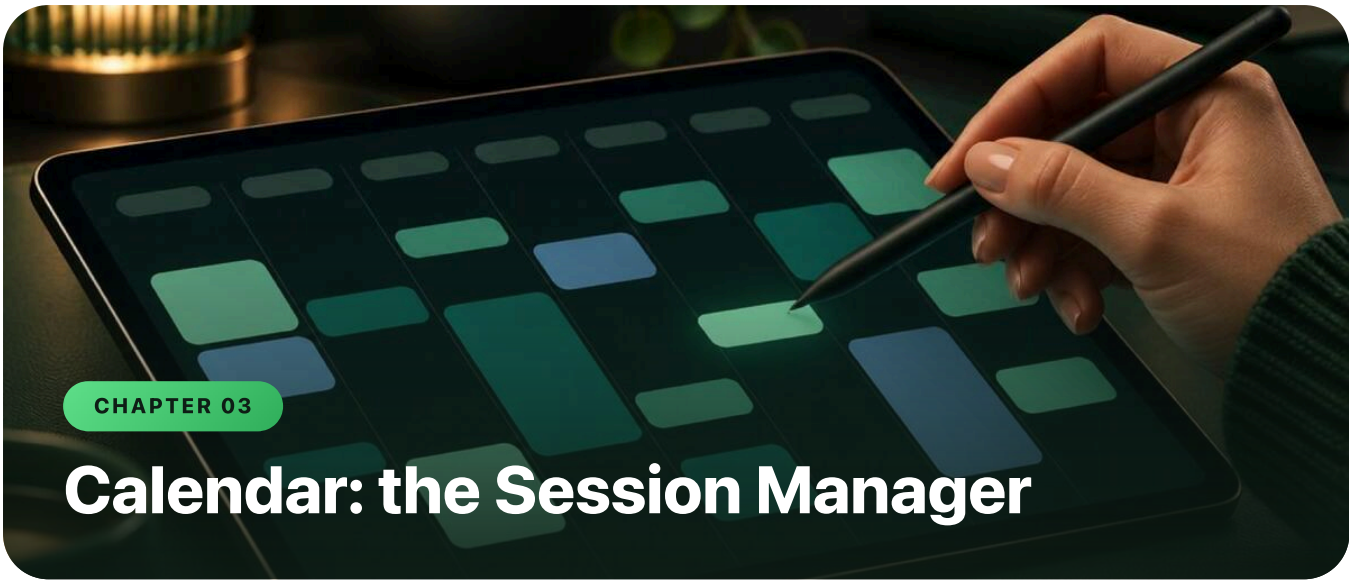
Three buttons for the most common tasks: “New appointment”, “Register” and “From a photo or file” (capture an appointment).

The sections as tiles

Where to find it: Home › Sections

Each tile opens a section and shows its status in one line: Session Manager, People, Notes, Packages & billing, Register, Rentals, Online booking, History, Switching over, Subscription and “Your data”.

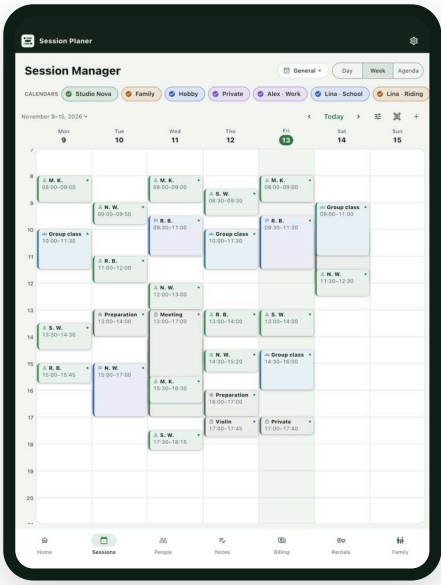
“Your data” opens the “About the app” sheet with privacy, backup, legal information and the support contact.



CHAPTER 03

Calendar: the Session Manager

In the “Sessions” tab you plan everything: sessions, groups, on-course sessions, private appointments and family. The menu bar at the top brings together navigation, search, export, capture and settings.



The menu bar

Where to find it: Sessions › Menu bar at the top

On the left: “Today” jumps to the current day, the arrows move by one day or one week, and the period in the middle opens the date picker.

Next to it you choose the view: Day, Week or Agenda.

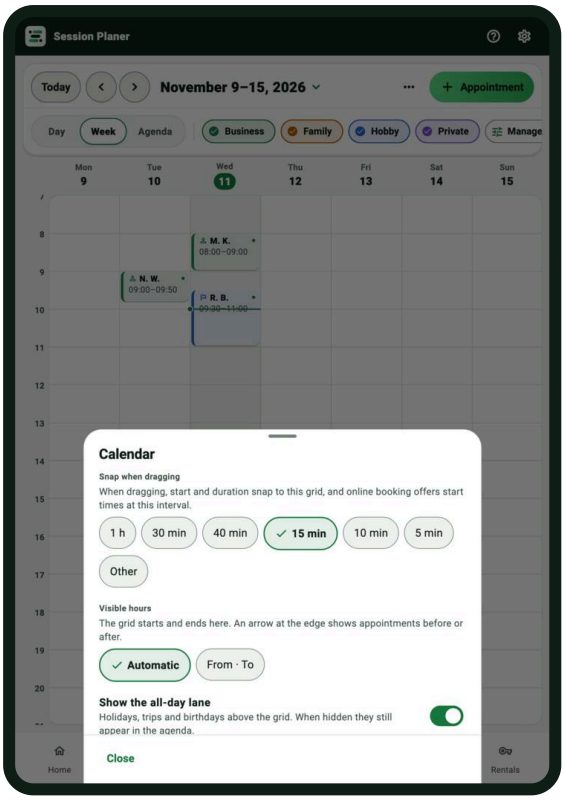
On the right: Search (magnifying glass), Export, Capture and the calendar settings (slider icon). If space is tight, they are under “More”. That is also where you find “Choose field”.

The green “Appointment” button creates a new appointment.

Choosing a date

Where to find it: Sessions › Tap the period

Tap the period in the menu bar. The picker goes from day to month to year and decade. Today is highlighted; “Choose today” jumps back.



Day, Week and Agenda

Where to find it: Sessions › View

Day and Week show an hourly grid with coloured appointments. Tapping an empty spot creates an appointment; tapping an appointment opens it. An arrow at the edge shows appointments before or after the visible hours.

The agenda lists all appointments day by day. Past appointments can be shown or hidden.

All-day appointments such as holidays, trips or birthdays appear in a lane above the grid.

Searching appointments

Where to find it: Sessions › Search

The search looks for name, title or place in all appointments – including hidden calendars. A result jumps to its day.

Export as a calendar file

Where to find it: Sessions › Export

Export shares the visible appointments of the period shown as a calendar file (.ics). This lets you bring them into another calendar or pass them on.

If nothing visible is in the period, the app tells you: change the period or show a calendar.

Showing and hiding calendars

Where to find it: Sessions › “CALENDARS” bar

Above the grid are your calendars, for example Business, Family, Hobby and Private. A tap hides or shows a calendar.

Hidden calendars disappear from Day, Week and Agenda. They still count when you plan: a family appointment blocks a session.

Managing calendars

Where to find it: Sessions › “CALENDARS” bar › Manage

Here you create new calendars (name and colour), rename them, change their colour, share or delete them. If you delete a calendar with appointments, they move to the Business calendar – no appointment is lost.

The Business calendar always stays: sessions, groups and on-course sessions belong there. You can rename it and change its colour.

From here you also reach “My devices, backup, accept invitation” and the “Family planner” switch.

STEP BY STEP

1. In the “CALENDARS” bar, tap “Manage”.
2. Under “NEW CALENDAR”, enter a name, for example “Club”.
3. Choose a colour.
4. Tap “Create calendar”.

Calendar settings

Where to find it: Sessions › Settings (slider icon) › Calendar

“Snap when dragging”: when you drag, start and duration snap to this grid (for example 15 min). Online booking offers start times at the same interval. Under “Other” you enter your own grid, for example 90 or 2 h.

“Visible hours”: automatic or from – to. An arrow at the edge shows appointments before or after.

“Show the all-day lane”: holidays, trips and birthdays above the grid. When hidden, they still appear in the agenda.

“Message after moving”: how long the app waits before a person is told about a new time. If you move an appointment several times, only one message is sent.

“Quiet hours 21:00 to 07:00”: messages from the night go out at 07:00.

Below that are the appointment types with image and display.

Appointment types with images

Where to find it: Sessions › Settings (slider icon) › Appointment types

Each type has an image and a display in the calendar: Text only, Image only, Image and text, or Text on image. A single appointment can change both.

With “New type” you create your own type, for example “beginners’ course”.

Appointments that are too short show text only – nothing is cut off. Tapping twice always opens an appointment.

STEP BY STEP

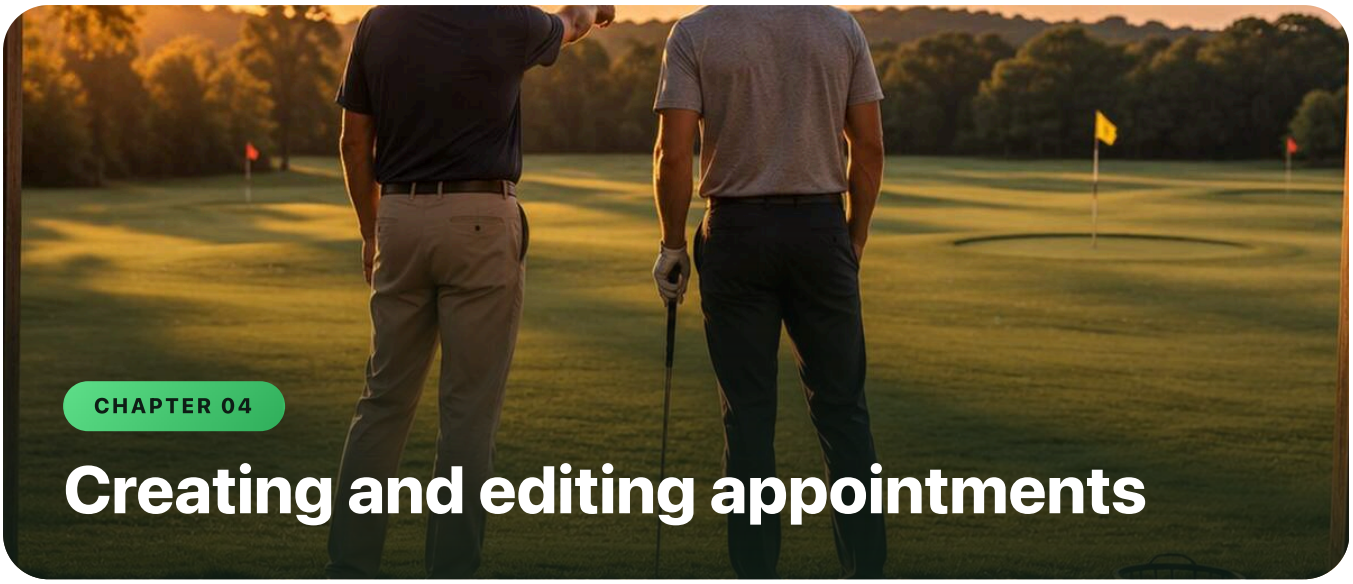
1. Open the calendar settings.
2. Under “Appointment types”, tap a type.
3. Choose an image from the selection or your own photo.
4. Choose the display and tap “Apply”.

Tip: For a single appointment: tap “Image and display” in the appointment. The type stays unchanged.

Choose field

Where to find it: Sessions › More › Choose field

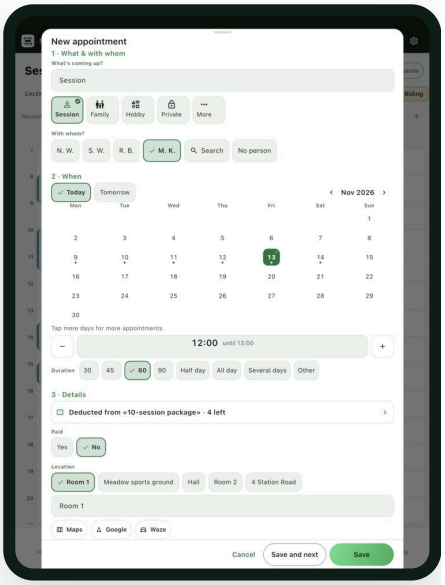
If you work in several fields, this is where you switch which one currently applies. It determines the words and images in the app, not your data.



CHAPTER 04

Creating and editing appointments

An appointment is made in three columns: What & with whom, When, Details. The app suggests, you decide.















New appointment

Where to find it: Sessions › Appointment (or tap an empty spot)

Column 1 “What & with whom”: choose a tile – for example Session, Group, On-course session, Family, Hobby or Private; under “More” there are others such as Personal time, Doctor, Break, Unavailable, Availability and Other. Add free text and, for sessions, the person and the offer.

Column 2 “When”: the day in the month view, the time (in 15-minute steps or typed in) and the duration. Tapping several days creates one appointment per day. “All day” and “Several days” enter all-day appointments.

Column 3 “Details”: billing, location, online link, receipt, repeat, maximum for groups, calendar and note.

STEP BY STEP

1. Tap “Appointment” or an empty spot in the grid.
2. Choose the tile and – for a session – the person.
3. Choose day, time and duration.
4. Add details if needed.
5. Tap “Save” – or “Save and next” for a series of single appointments.

> **Tip:** If the appointment overlaps with another, the app warns you. All calendars count, including hidden ones. It does not block anything – you decide.

Recording attendance

Where to find it: Appointment › What became of the appointment?

After the appointment you record: Attended, No-show, Cancelled at short notice or Cancelled.

With “Cancelled”, the unit goes back to the package. With a short-notice cancellation, it stays deducted; a fee in CHF is possible. If cancellation rules apply, the app suggests what your rules say.

Billing on the appointment

Where to find it: Appointment › Details › Bill via

A session is deducted from one of the person’s packages or billed individually with a price. The app shows how many units are left.

Under “Paid” you record whether and how it was paid: card, cash or QR bill. The app records what was agreed and what has been paid – it does not collect money.

Location, navigation and online link

Where to find it: Appointment › Details › Location

Every appointment has a location. The Maps, Google and Waze buttons open the route. An address only leaves the device when you tap, never automatically.

Under “More” you add an online link (Zoom, Teams, Meet). The appointment then shows “Join”.

Repeat, groups and note

Where to find it: Appointment › Details › More

“Repeat”: daily, weekly or monthly, with a number. If several days are selected, nothing is repeated – each day becomes one appointment.

For groups you set a maximum and add more participants. When the group is full, the app tells you.

“Receipt (photo)” shows the photo of a captured appointment card. The note takes anything that does not fit anywhere else.

Image and display of an appointment

Where to find it: Appointment › Image and display

Here you give a single appointment a type, an image (from the selection, your own photo or no image) and a display in the calendar. “Like the type” uses what is set for the type.

Appointments in shared calendars

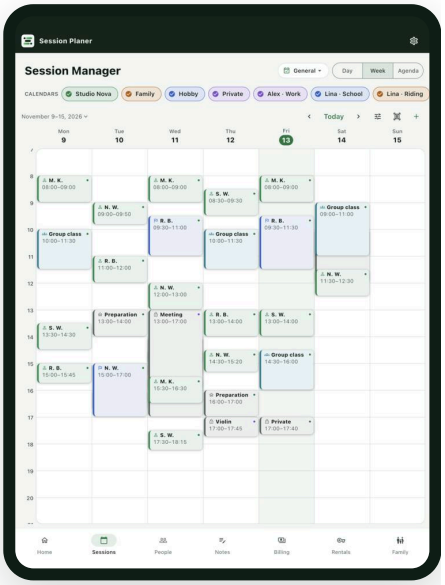
Where to find it: Appointment in a shared calendar

If a calendar is shared with you, your role is shown: Owner, Edit, Read, Busy only or Register. With “Read” you see the appointments; only the person who shares the calendar or may edit it can change them.

CHAPTER 05

Moving with confirmation

You move appointments by dragging, or without dragging in steps. Afterwards a card confirms what happened – with Undo.



1 Drag the appointment or choose “Move”

2 “Appointment moved” card with Undo

3 After the set time, an email goes out

Dragging

Where to find it: Sessions › Day or Week › Drag the appointment

Press and hold an appointment until it lifts, then drag it to a new time or a new day. It snaps to your grid. The handle at the bottom edge changes the duration.

While you drag, you see the new time and notes: overlaps, times outside your online hours, or whether something is rented out at the same time. You can still drop it.

Moving without dragging

Where to find it: Appointment › Move

For anyone who does not want to or cannot drag: move in steps (–/+ minutes, day –1 / day +1), change the duration or choose a date. The same logic applies as when dragging. The app shows “Before” and “New” side by side.

STEP BY STEP

1. Open the appointment.
2. Tap “Move”.
3. Move in steps or choose a date.
4. Check “Before” and “New” and tap “Move”.

The confirmation card

Where to find it: After moving › “Appointment moved” card

After every move, a card appears at the bottom: “Appointment moved” with the new time, and whether and when the person gets an email (“gets an email in 10 s”). With “Undo” the appointment goes back to how it was.

For series, the app asks whether only this appointment or all following ones should move too.

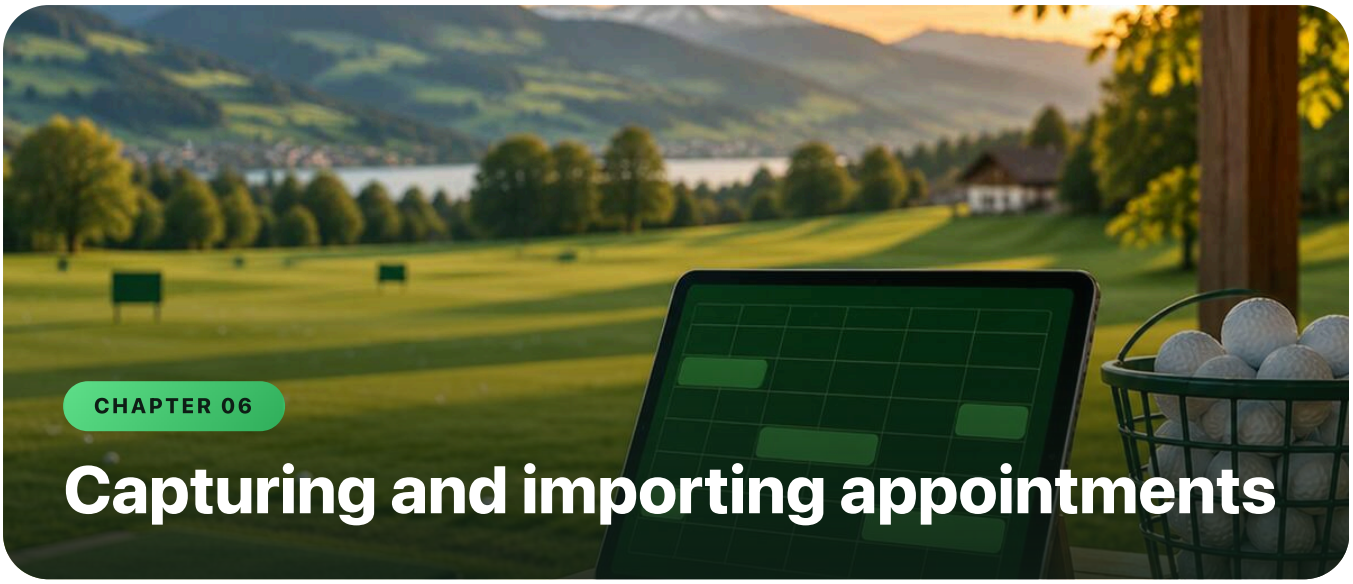
Message to the person

Where to find it: Appointment › “Message in …” indicator

Until the message goes out, the appointment shows an indicator. If you tap it, you choose “Send now” or “Don’t notify”. If you move the appointment again before then, only one message goes out – with the first old time and the last new time.

Emails are only sent for appointments in the Business calendar, to people with an email address and online booking. If a person has no email address, the app tells you and you can share the message yourself.

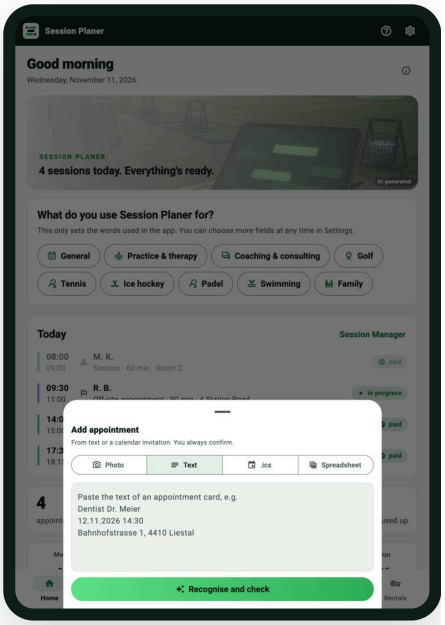
Moving is blocked in calendars you may only read. If attendance has already been recorded, the app asks first; package and payment do not change.



CHAPTER 06

Capturing and importing appointments

You do not have to type appointments in. The app reads them from a photo, a text, a calendar invitation or a spreadsheet. You always confirm.



From a photo

Where to find it: Sessions › Capture › Photo

Photograph an appointment card or choose a picture from Photos. Text recognition on the device reads the day, time and place. The photo stays with the appointment as a receipt.

From a text

Where to find it: Sessions › Capture › Text

Paste the text of an appointment card or message, for example “Dentist Dr. Meier, 12.11.2026 14:30, Bahnhofstrasse 1”. “Recognise and check” suggests the appointment.

From a calendar invitation (.ics)

Where to find it: Sessions › Capture › .ics

Paste the content of an .ics invitation (it starts with BEGIN:VCALENDAR). “Read appointments” lists all appointments found. Untick anything you do not want to bring over.

From a spreadsheet (schedule export)

Where to find it: Sessions › Capture › Spreadsheet

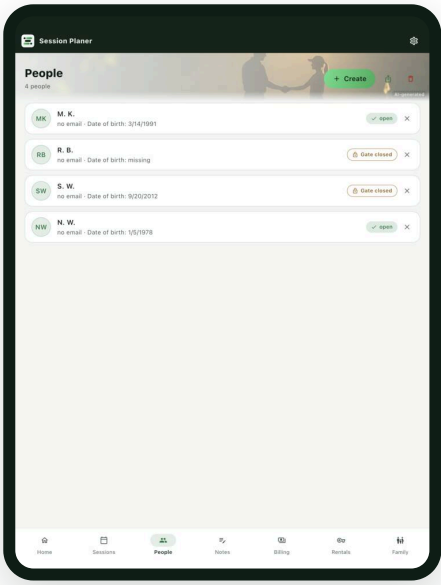
Choose the schedule export of your previous program as .xlsx. The columns Date, Start, End and Name are expected – the way ProAgenda exports them. All appointments are read and listed for checking. Nothing is saved automatically.



CHAPTER 07

People

Under “People” you find everyone you work with – with profile, consents, packages and notes.



The list

Where to find it: People

Each row shows name, email and date of birth. “Gate closed” means: the age gate is closed because the date of birth is missing or the person is under 16 and there is no parental consent. “online” means: the person may book online.

Tapping a person opens their profile for editing.

Adding a person with consent

Where to find it: People › Create

Two steps: first the details (first name, last name, email and date of birth are required), then the person confirms each consent separately: video and photo, store session data, AI processing (pseudonymised), share with the coach, marketing. Nothing is preselected; marketing is off by default.

For people under 16, a parent confirms, not the child. Without this confirmation, the person cannot be added.

STEP BY STEP

1. Tap “Create”.
2. Enter first name, last name, email and date of birth.
3. Tap “Continue to consent”.
4. Hand the device to the person or to a parent.
5. Set and confirm each consent separately.

> **Tip:** Without a date of birth, the age gate stays closed. A placeholder date is not a solution – enter the real date later.

Editing a profile

Where to find it: People › Tap a person

First name, last name, email (for the sign-in link, confirmation and reminder), phone and date of birth.

“May book online” needs an email address and a date of birth; under 16, only with documented parental consent. The booking service only receives first name, email and balance.

Exporting the data package and deleting

Where to find it: People › top right

“Export data package” copies all data as a data package to the clipboard. It contains personal data – only paste it where it belongs.

With the bin icon in a row you delete a person. Beforehand, the app tells you what will be deleted with them (appointments, packages, cards, rentals, notes).

“Delete all data” permanently removes appointments, packages, people, notes, resources, cards and photos. This cannot be undone.

> **Tip:** Before deleting the app, save the data package or create a backup – when the app is gone, the data is gone too.



CHAPTER 08

Notes

After the session, you record what mattered in one minute.

Writing notes

Where to find it: Notes

Choose the person and fill in four fields: Goal, Focus today, Main change and Task until the next session. Every entry is saved immediately.

“Copy notes” puts the text on the clipboard. The app sends nothing by itself – you send it the way you usually do.

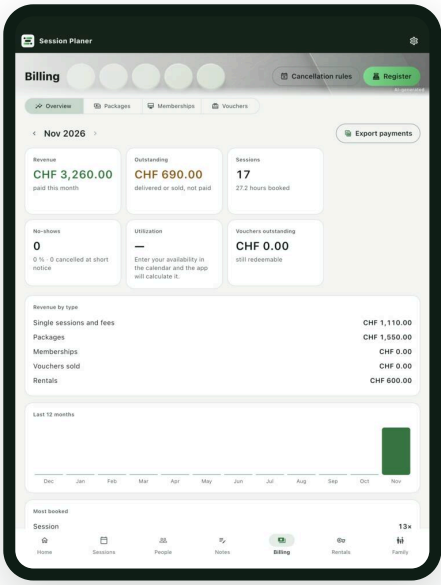
Passing it on is blocked while the person’s age gate is closed. The notes are saved anyway.



CHAPTER 09

Billing

The “Billing” tab contains Overview, Packages, Memberships and Vouchers. The app records what was agreed and what has been paid – it does not collect money.



Monthly overview

Where to find it: Billing › Overview

Revenue (paid this month), Outstanding (delivered or sold, not paid), sessions, no-shows, utilization and vouchers outstanding. Also revenue by type, the last 12 months and what is booked most.

The app calculates utilization as soon as you enter your availability in the calendar.

“Export payments” copies the payments as a table (CSV) – for Excel, Numbers or your accounting.

Packages

Where to find it: Billing › Packages

A package belongs to a person: with units to deduct (for example a 10-session package) or as single billing. Plus price, purchase date and validity.

Every session is deducted, every timely cancellation is credited back. By hand, you can use “Deduct unit” and “Top up unit”. “Record as paid” and “Undo payment” record the payment status. The history shows every movement.

If a package has expired, you decide whether you still grant open units.

STEP BY STEP

1. Choose the person.
2. Tap “Package”.
3. Choose the size (units or single), description, price, purchase date and validity.
4. Tap “Create”.

Memberships

Where to find it: Billing › Memberships

A membership with a fee per month, quarter, half-year or year – optionally with a discount on sessions, sessions included per period and “Weekdays only, 08–16” for a cheaper daytime membership.

The app shows outstanding fees with date and amount. “Cancel as of …” ends the membership; deleting removes it with all its fees.

Vouchers

Where to find it: Billing › Vouchers

“Sell voucher” creates a value voucher with a code, with value, name, buyer and validity. It is redeemed in full or in parts; the app keeps track of the remaining value.

Codes contain no 0, O, 1, I or L – so nothing can be mixed up.

Cancellation rules

Where to find it: Billing › Cancellation rules

Without rules, a simple deadline applies: free cancellation up to a certain time before, after that you decide case by case.

With cancellation rules you set levels on a timeline (for example half between 24 and 12 hours), separately for Single sessions, Memberships and packages, and Rentals. The handles can be dragged – you can set the same values below without dragging.

Exceptions: no-shows, illness with a medical certificate (you decide), weather (free cancellation outdoors) and a credit if you cancel yourself.

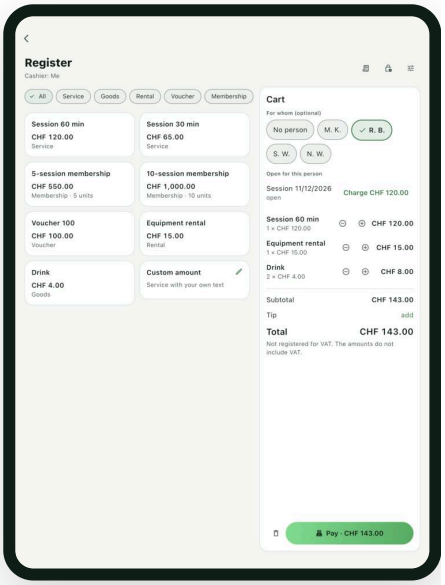
“Cancel and reschedule online” sets until when your people can cancel in the web app and how often they may reschedule themselves. The summary shows how your people read the rules.



CHAPTER 10

Register

The register sells sessions, memberships, vouchers, rentals and goods with receipts, voids and end-of-day close. It does not process payments itself – you confirm that the money has been received.



Selling

Where to find it: Home › Register

On the left you tap items; on the right the basket fills up. For each line you change quantity, price and discount (as a percentage or an amount). For one-off items there is “Custom amount”.

Optionally choose the person – for a membership it is required, because it creates a package for them. Open sessions of this person can be billed directly at the same time.

Tips carry no VAT and appear as a separate line on the receipt.

STEP BY STEP

1. Open the register from Home or Billing.
2. Tap items.
3. Optionally choose the person.
4. Tap “Pay”.
5. Choose the payment method and tap “Book”.

Paying

Where to find it: Register › Pay

Payment methods: Cash, Card, Invoice, Credit, Voucher and your own providers. Several partial payments are possible. For cash, the register calculates the change and rounds to 5 centimes.

“Invoice” means: the money has not been received yet. The receipt shows “open”; membership and voucher stay unpaid until you record the payment under Billing. The register does not create a QR bill yet.

“Credit” is recorded, not deducted – the app does not yet keep a money balance per person.

Receipts and voids

Where to find it: Register › Receipts

Every sale is recorded with a consecutive number and sealed. The app checks the chain of receipts: no gap, no altered receipt.

A receipt is never changed or deleted. “Void” books a void receipt with a new number that cancels the amount. Unused memberships and vouchers are taken back; you return the money yourself.

Receipts can be shared as PDF, printed and emailed; the cash book is available as CSV.

End-of-day close

Where to find it: Register › End-of-day close

The end-of-day close summarises a day’s receipts: by payment method, by the person who took payment, and by VAT rate. Optionally you count the cash; the app shows the difference from the expected amount.

A close is sealed and cannot be changed afterwards. If you sell something else on the same day, it goes into a further close. You can share it as PDF or CSV.

Register settings

Where to find it: Register › Register settings

“Items”: everything you sell, with type (service, goods, rental, voucher, membership), price, VAT rate, units in the membership and validity. “Insert examples” creates a few samples.

“Business and VAT”: name and address of the business (they appear on every receipt), country, VAT liability, number, VAT rates with validity date, footer and your logo.

“Who takes payments”: names of people allowed to take payments. Every receipt records who took the payment.

“Payment providers”: your own providers with a link or QR code.

Your own payment providers

Where to find it: Register › Register settings › Payment providers

Any provider with a payment link or QR code: Payrexx, Stripe, SumUp, TWINT, PayPal or your own link with placeholders. The register fills in amount and reference, shows a QR code or opens the provider’s app.

Your access details are stored only in this device’s keychain. Optionally, a webhook via the booking service reports, signed, that payment has been made.

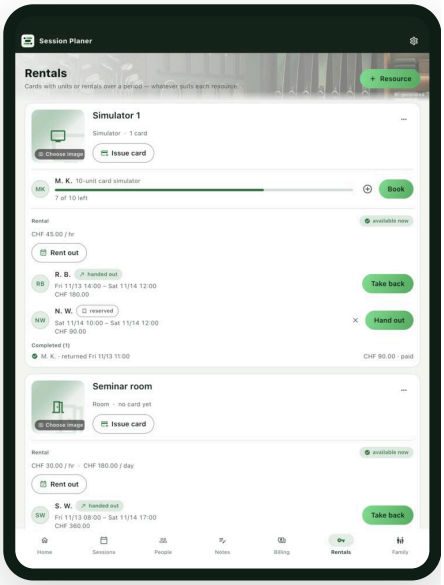
None of the templates has been tested against the real service. Make a small test payment first.



CHAPTER 11

Rentals

Cards with units or hire over a period – whatever suits each resource: simulator, measuring device, court, room or equipment.











Resources

Where to find it: Rentals › Resource

Create what you rent out: name, type (measuring device, simulator, court, room …) and, if you like, your own image. For hire over a period: stock, rates per hour, day or week (the cheapest always applies), deposit and buffer after return.

“Blocked” (faulty or in service) prevents renting until you lift the block.

Cards

Where to find it: Rentals › Resource › Issue card

A card belongs to a person: card with units, flat rate or annual card. “Book” deducts one unit, “Top up +10” adds more. When it is used up, the app tells you.

Hire: reserve, hand out, take back

Where to find it: Rentals › Resource › Rent out

Choose person, quantity and period. The price is calculated from the rates; you can change it. If nothing is available, the app tells you.

At handover you record the condition – that protects you both. At return you compare; a surcharge for late return, damage or loss is possible, and the deposit is returned.

A reservation can be cancelled; your cancellation rules for rentals apply.

STEP BY STEP

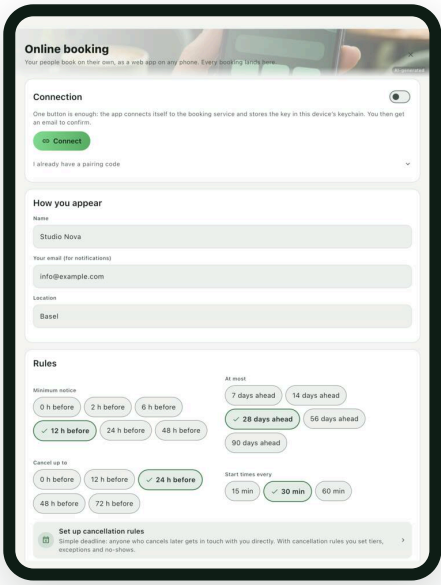
1. Open the resource and tap “Rent out”.
2. Choose person, quantity, From and To.
3. Check the price and tap “Reserve”.
4. At pickup, tap “Hand out” and record the condition.
5. At return, tap “Take back” and enter the condition and any surcharge.



CHAPTER 12

Online booking

Your people book on their own, as a web app on any phone, without a password. Every booking goes into your calendar; confirmation and reminder are sent by email.



1 A person books on your booking page → 2 The booking service accepts the booking → 3 Your app syncs and adds it → 4 The person receives an email

Setting up the connection

Where to find it: Home › Online booking › Connection

One button is enough: “Connect” connects the app to the booking service and stores the key in this device’s keychain. You then get an email to confirm. Until then, your people cannot sign in.

If you already have a pairing code, you pair with “I already have a pairing code”.

The app syncs in the background; “Sync now” fetches new bookings immediately. “Unpair” deletes everything of yours at the service; everything stays on the iPad.

STEP BY STEP

1. Under “How you appear”, enter your name and your email.
2. Tap “Connect”.
3. Open the email and tap “Confirm”.
4. Under “What is bookable online”, create an offer.
5. Under “Who may book online”, enable the people.

How you appear, logo and emails

Where to find it: Home › Online booking › How you appear

Name, your email for notifications, and location. Your logo appears in the emails to people, on receipts and the end-of-day close, and on your booking page. It is cropped to a square; location and camera data are removed.

“Design e-mails to people” opens the email templates.

Rules and weekly schedule

Where to find it: Home › Online booking › Rules · When bookable online

Rules: minimum notice in hours, at most how many days ahead, cancel up to, start times every … minutes.

Weekly schedule: one or more time windows per day. Busy times from your calendar are left out automatically – without names.

Season (for example outdoors from April to October), holidays and absences, “Not bookable on public holidays” and “At most per person and day”.

What is bookable online

Where to find it: Home › Online booking › What is bookable online

You offer sessions and resources individually, with a name in the web app, a duration and whether they may only be booked with a membership or package (or only with a card). Each offer can have its own times; otherwise your weekly schedule applies.

Who may book online

Where to find it: Home › Online booking › Who may book online

Here you enable people and set the reminder. The service only receives first name, email and balance. Notes, date of birth and health information stay on the device.

If the email address or date of birth is missing, the app tells you what to add.

Your booking link and your booking page

Where to find it: Home › Online booking › Your booking link

Your own address (3 to 30 characters) with a QR code to print, copy and share. If you change it, the old one still redirects for 30 days.

On the booking page you set: the title of your schedule, whether free times are publicly visible, whether new people may request access (optionally accepted automatically from 16), whether cancelling online is allowed, the language, and your phone number for short-notice requests.

“Add to your website”: as a button or as a calendar. Only websites you allow may show the calendar in a frame.

Requests from new people

Where to find it: Home › Online booking › Requests

New people request access on your booking page. You only see requests with a confirmed email address, and you accept or decline them. You add accepted people to your list of people to give them credit; this requires the date of birth.

Calendar subscription and busy times

Where to find it: Home › Online booking › Calendar subscription

Your appointments appear in Google Calendar, Apple Calendar or Outlook through a secret link that updates every 15 minutes. Notes are never included; names only if you turn that on. A new link makes the old one invalid immediately.

“Busy from your private calendar”: enter the secret iCal address of your private calendar. The booking service then offers nothing where you are busy, and keeps only start and end.

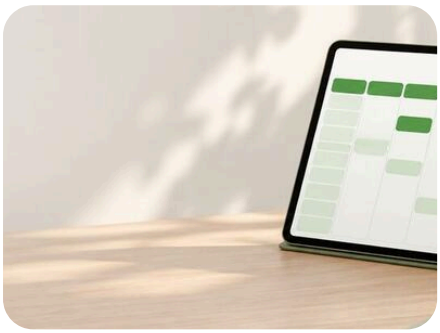
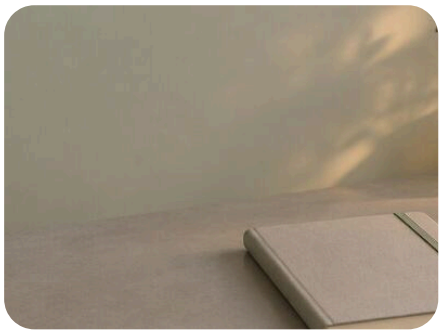
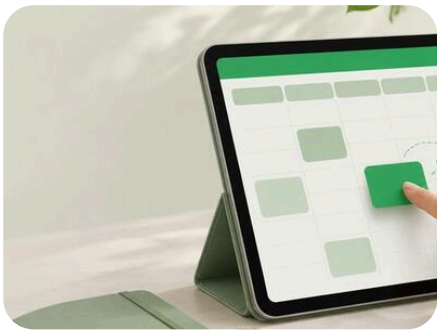
STEP BY STEP

1. Turn on “Offer appointments as a calendar subscription”.
2. Tap “Create link” and “Copy link”.
3. Google: on the left next to “Other calendars”, tap + › “From URL”. Apple: Settings › Calendar › Accounts › Add Account › Other › “Add Subscribed Calendar”. Outlook: Add calendar › “Subscribe from web”.

CHAPTER 13

E-mails to people

Booking, cancellation and rescheduling – this is how the emails your people receive look. You adjust texts, image and contact details and see the preview straight away.

Designing templates

Where to find it: Home › Online booking › Design e-mails to people

Choose the type (Booking, Cancellation, Rescheduling) and the language of the email. Then the subject, introduction, closing and greeting, and an extra note, for example directions to the place. Leaving a field empty means: the standard text applies.

Building blocks insert real values: first name, offer, date, time, place, your name, balance. Tap into a field and then on a building block.

Switches: banner image at the top, your logo at the top, show phone and your email address in the email.

STEP BY STEP

1. Open Online booking and tap “Design e-mails to people”.
2. Choose the type and language.
3. Adjust the texts and insert building blocks.
4. Check the preview.
5. Tap “Send a test e-mail to me”.

Tip: “Reset to standard” restores the standard texts.

Preview and test email

Where to find it: E-mails to people › Preview

The preview comes from the booking service and shows the designed email. Without a connection, your texts are still saved.

“Send a test e-mail to me” sends the email to your own address.

When e-mails are sent

Where to find it: E-mails to people › When e-mails are sent

Only for appointments in the Business calendar, to people with an email address and consent to online booking. Never to family, never for private appointments, breaks or past appointments. If you move an appointment between 21:00 and 07:00, the email goes out at 07:00.

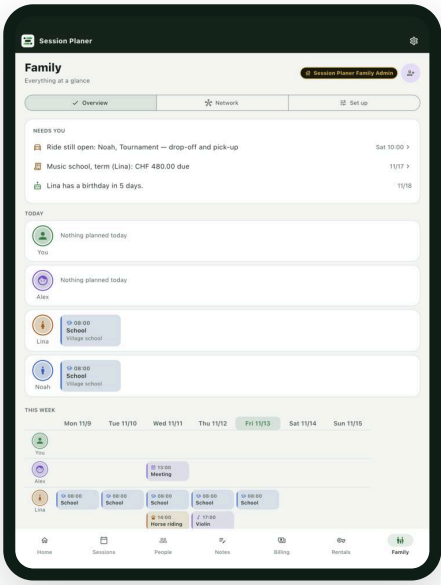
If an email was not sent, it is listed under “E-mails that were not delivered”. Check the address in the profile and tap “Send again”.



CHAPTER 14

Family

The family planner is a separate tab next to your work: who is where and when, who drives, what needs to come along and what needs to be paid.





Turning on Family

Where to find it: Gear icon › Settings › Fields › Family

Turn on “Family” in the settings or under Sessions › Manage calendars › “Family planner”. The “Family” tab appears at the bottom.

Overview

Where to find it: Family › Overview

Today and this week for each person, with drop-off and pick-up. “NEEDS YOU” collects open rides, course fees that are due, birthdays and requests from the children. If everything is in order, the app tells you.

People, areas and timetable

Where to find it: Family › Set up

Create each person: name, role (Parent, Child, Other), colour, photo or image, year of birth, birthday, household and protected emergency details.

Give each person areas such as School, Sport, Music, Riding, Therapy & doctor or Friends. Each area is its own calendar with a weekly timetable. Therapy and doctor appointments are protected.

You enter holidays by hand – the timetable then does not apply. Course fees with a due date remind you 14 days in advance on the family page.

Rides and packing list

Where to find it: Family › Tap an appointment

For each family appointment you enter who drops off and who picks up, and you keep a packing list. The app shows overlaps and open rides on the tile.

Network

Where to find it: Family › Network

The network shows who belongs to which calendar, who sees what and who drives. The same information is listed below.

Managing the family and inviting devices

Where to find it: Family › Set up › Manage family

Each person can have the app on their own device and sees there only what you share: Sees nothing, Busy only, Sees everything, May request or May edit – per calendar.

Children can suggest appointments; a parent accepts or declines them.

For each calendar there is an invitation with a code or QR code. On the other device: open the app, choose “Invited by my family” and redeem the code. No subscription is needed.

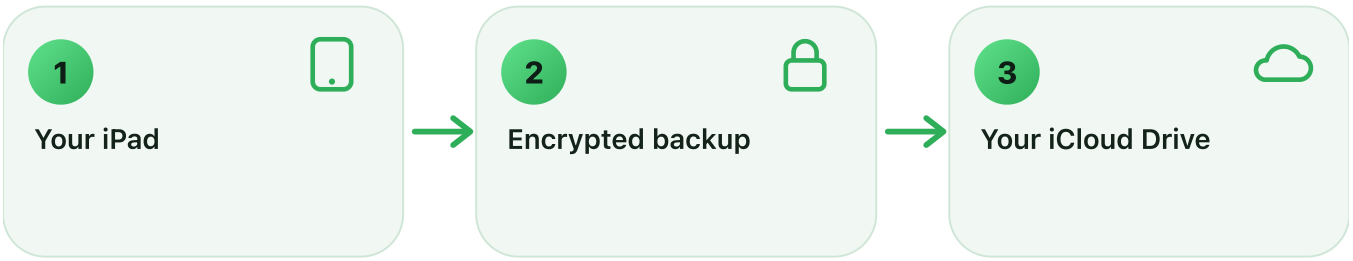
If a device is lost, you remove the person from every shared calendar. The keys then change.



CHAPTER 15

Devices, sharing and backup

Your data is stored on your device. With a recovery key you sync iPad and iPhone, share calendars and make encrypted backups.



Recovery key

Where to find it: Sessions › Manage calendars › My devices and backup

The key has 14 groups of four characters. Write it down or print it and keep it separate from the iPad. With it you bring all data onto a new device. Without it: if all your devices are lost, the data is lost too. Nobody can reset it.

STEP BY STEP

1. Open “My devices and backup”.
2. Tap “Create recovery key”.
3. Write down the key or save it as a file.
4. Confirm with “Written down”.

Connecting and syncing another device

Where to find it: My devices and backup › Connect another own device

The pairing code is valid once and for 15 minutes. On the other device: “Connect to my other device” and enter the code. Both devices then show the same fingerprint.

Syncing is encrypted. If an appointment was changed on two devices at the same time, the more recent version applies.

Backup

Where to find it: My devices and backup › Backup

Hourly and encrypted with your recovery key – to this device and to your own iCloud Drive. The publisher’s service never receives the backup. “Back up now” backs up immediately.

On a new device: “Restore on a new device”, enter the key and choose the backup file.

Sharing calendars and roles

Where to find it: Sessions › Manage calendars › Share this calendar

Only what you share leaves the device – encrypted. Roles: Owner, Edit, Read, Busy only and Register. The app suggests a role.

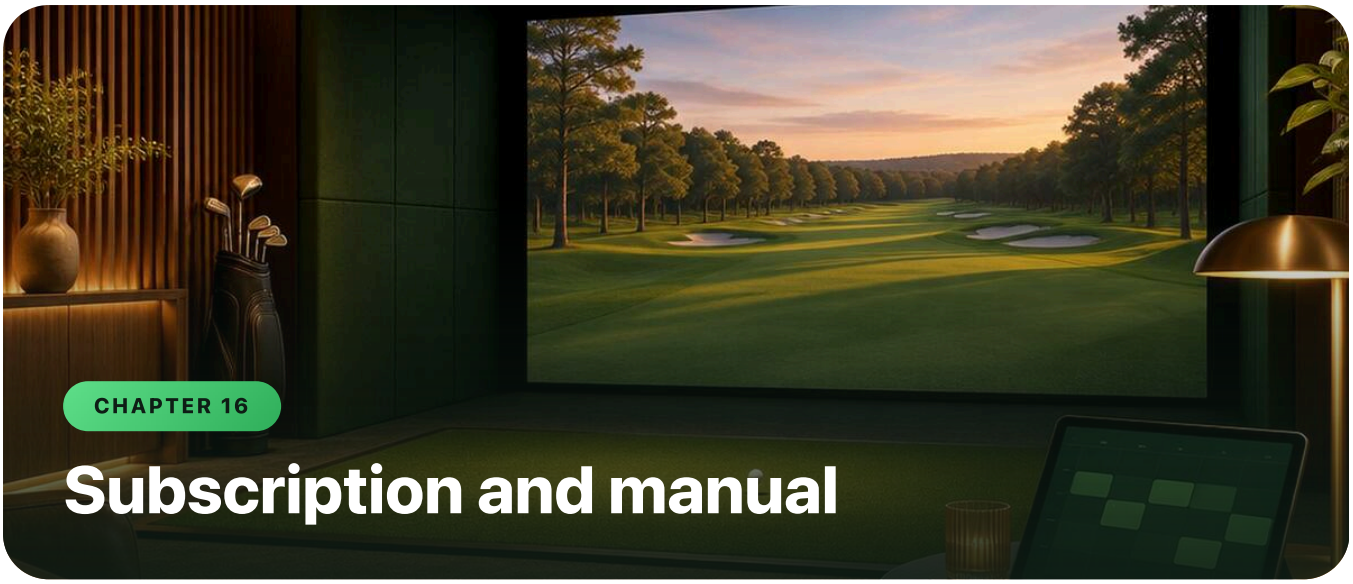
An invitation is valid once and for 7 days. The invited person sees your fingerprint – compare it together before they accept.

If you remove someone, the key changes. Data about people can only be shared in the Business calendar; working with a team is part of Academy.

Accepting an invitation

Where to find it: My devices and backup › Invitation

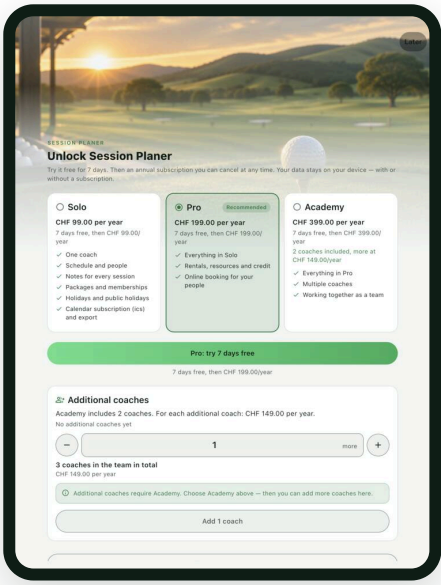
Paste the link or code of the invitation. Compare the fingerprint with what is shown under “My devices” on the inviting person’s device. If it does not match, decline.



CHAPTER 16

Subscription and manual

The first week is free. After that, an annual subscription you can cancel at any time. Your data stays on your device – with or without a subscription.



The tiers

Where to find it: Home › Subscription › View plans

Solo: one coach, schedule and people, notes, packages and memberships, holidays and public holidays, calendar subscription and export.

Pro: everything in Solo, plus rentals, resources and credit, and online booking.

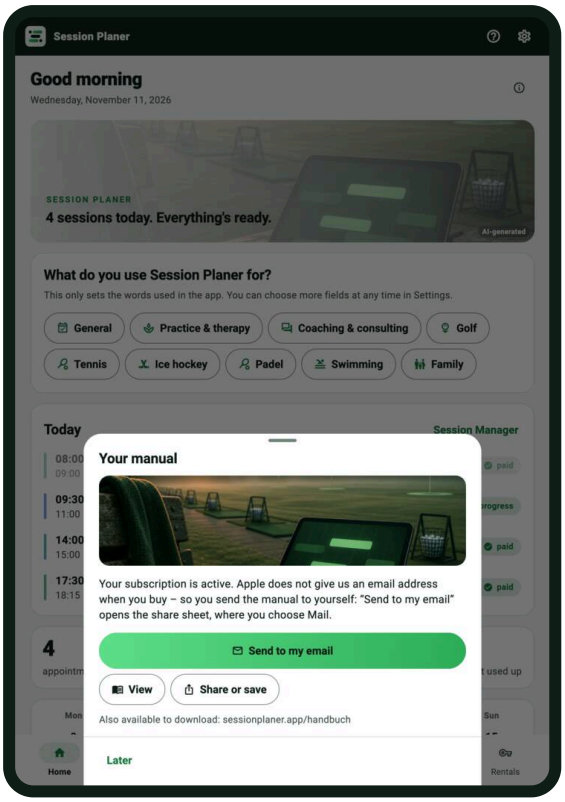
Academy: everything in Pro, plus several coaches and working together as a team. Academy includes 2 coaches; you add more as an annual subscription.

Managing the subscription, redeeming a code, restoring

Where to find it: Home › Subscription

You cancel and change the payment method via “Manage Subscription” in your App Store account. You redeem an offer code via “Redeem Code” directly with Apple. “Restore Purchases” brings an existing subscription onto a new device.

Subscription and Lifetime also apply to your family through Family Sharing. The subscription renews automatically for one year unless you cancel it at least 24 hours before it ends.



Your manual as a PDF

Where to find it: Question mark at the top right › Manual as PDF

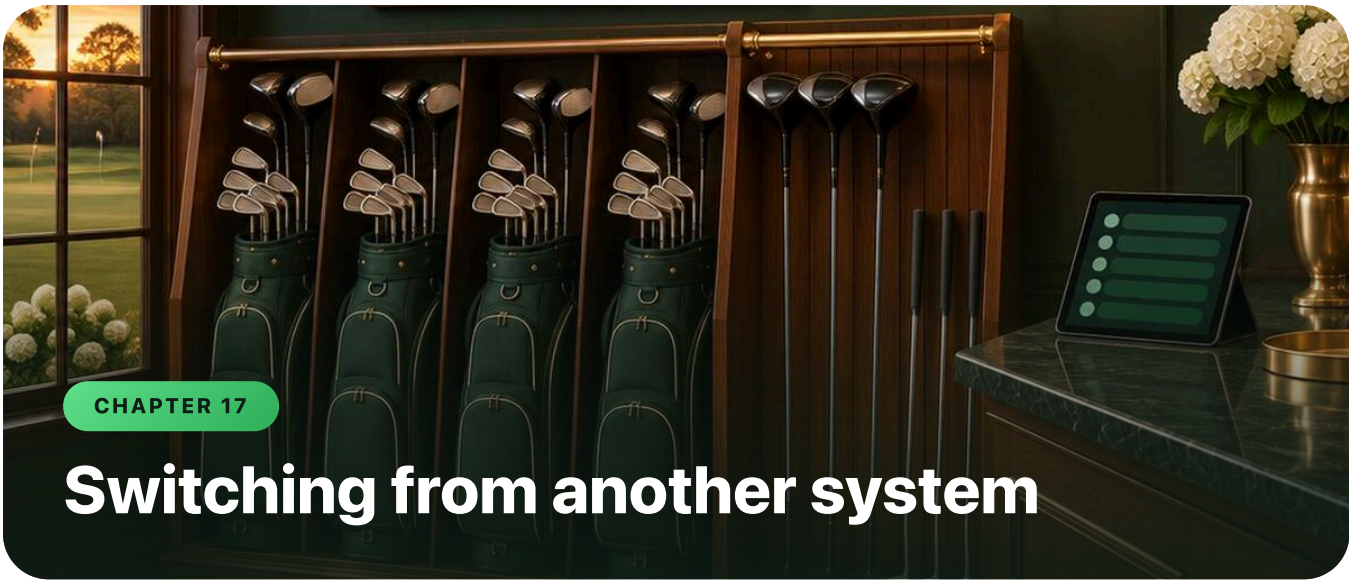
After buying or redeeming a subscription, the app shows the “Your manual” sheet. Apple does not give us an email address when you buy – so you send the manual to yourself: “Send to my email” opens the device’s share sheet, where you choose Mail.

“View” opens the PDF in the app; “Share or save” puts it, for example, into the Files app. The manual is stored in the app and works offline. It is also available to download at sessionplaner.app/handbuch.

Admin code

Where to find it: Home › Subscription › Admin code

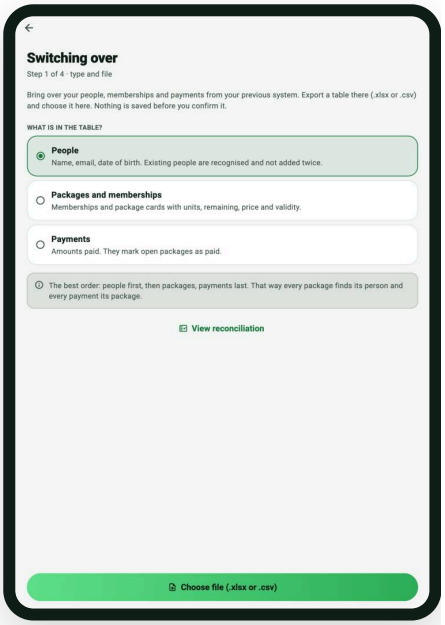
The admin code marks the publisher’s device as “Session Planer Admin” – for maintenance and support. It does not unlock any feature; only Apple purchases and offer codes do that. A code is only valid for the device ID it was issued for.



CHAPTER 17

Switching from another system

Are you coming from ProAgenda, Google Calendar, Outlook, Apple Calendar or Excel? This is how you bring along appointments, people, memberships and payments. Nothing is saved before you confirm it.



1 Export from the old program → 2 Import into the app and check → 3 Compare with the old system

The way in three steps

Where to find it: Home › Switching over

1. Export from the old program: people, memberships and payments as a spreadsheet (.xlsx or .csv), appointments as a schedule spreadsheet or calendar file (.ics).

2. Import into the app and check: people, packages and payments via “Switching over”, appointments via “Capture”.

3. Compare: the report in Switching over shows packages, units, used, remaining and outstanding for each person – put it next to the old system.

The best order: first people, then packages, last payments, and after that the appointments.

People, packages and payments from a spreadsheet

Where to find it: Home › Switching over › Choose file

Step 1: choose what is in the spreadsheet (People, Packages and memberships, Payments) and the file. Step 2: the app suggests how to match the columns by their names – check each one. Step 3: the preview shows every row with notes; rows without a tick are left out. Step 4: the comparison.

Existing people are recognised and not added twice. The app cannot read the old Excel format .xls – save the file as .xlsx or .csv.

STEP BY STEP

1. Open Home › Switching over.
2. Choose “People” and choose the file.
3. Match the columns and tap “Show preview”.
4. Check the rows and bring them over.
5. Do the same for “Packages and memberships”, then “Payments”.
6. Compare the result with the old system and tap “Copy report”.

From ProAgenda

Where to find it: Home › Switching over · Sessions › Capture › Spreadsheet

If your clients, lesson cards or payments from ProAgenda are available as a spreadsheet (.xlsx or .csv), you import them under Home › Switching over – first people, then packages, then payments. The app suggests how to match the columns; you adjust anything that is named differently in ProAgenda.

You import the ProAgenda schedule export (.xlsx with the columns Date, Start, End, Name) under Sessions › Capture › Spreadsheet. The app recognises lessons, groups, breaks and “Not available” and shows all appointments for checking.

From Google Calendar, Outlook or Apple Calendar

Where to find it: Sessions › Capture › .ics

Google Calendar: in the browser under Settings › “Import & export” › Export. You get one .ics file per calendar.

Outlook: save or share the calendar as an iCalendar file (.ics).

Apple Calendar on the Mac: choose the calendar › File › Export.

Open the .ics file in a text editor, copy the entire content (it starts with BEGIN:VCALENDAR) and paste it under Sessions › Capture › .ics. “Read appointments” lists all appointments; untick anything that should not come along.

> **Tip:** If you simply want your existing calendar to keep running, you do not need to move anything: enter its secret iCal address under Online booking › Calendar subscription › “Busy from your private calendar”. Online booking then offers nothing where you are busy.

From Excel or your own list

Where to find it: Home › Switching over

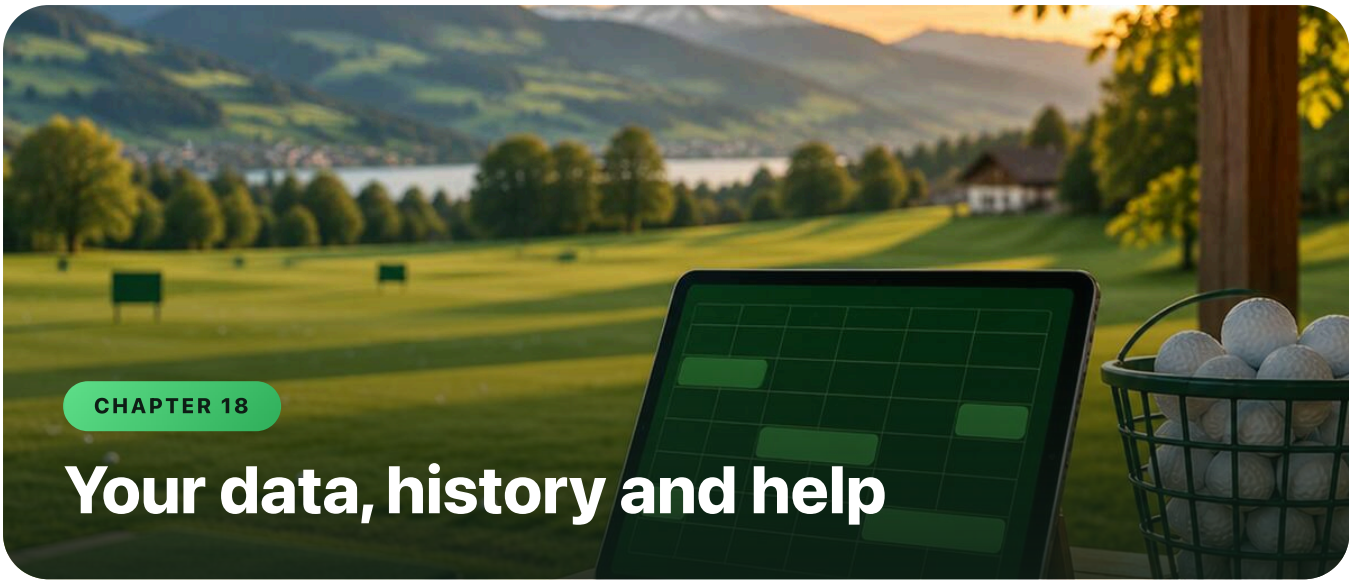
Your own list needs a header row and one row per person. For people, a name or email is enough; the date of birth may be missing and can be added later (until then the age gate stays closed). For packages: person, description and total or remaining units. For payments: person or package code, and amount.

Dates work best in the format DD.MM.YYYY. The app leaves ambiguous dates empty and tells you.

Other sources

Where to find it: Home › Switching over

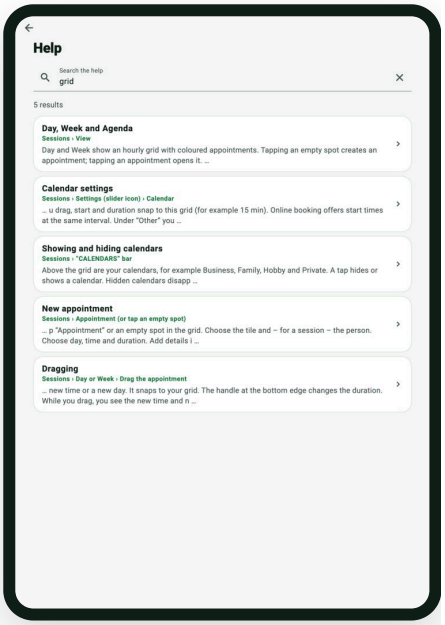
The same way applies to other programs: export a spreadsheet or a calendar file and import it. Which additional sources the app knows is stated in Switching over itself and in the switching guide on sessionplaner.app.



CHAPTER 18

Your data, history and help

Everything you enter is stored on this device. There is no account and no tracking, advertising or analytics service.



About the app

Where to find it: Home › Your data

The “About the app” sheet shows the version, where your data is stored and which connections to the outside exist: public holidays (without personal data), map apps when you tap a route, online booking with only what is needed, and encrypted sync and backup.

It also contains the introduction, subscription, history, Privacy Policy, legal notice, Terms of Use and the support email address.

History

Where to find it: Home › History

Who changed what and when: you, a person online, an import or another device. Filter by Appointments, Packages & payments, People, Online and Rentals. Entries can neither be edited nor deleted individually.

If something could not be saved

Where to find it: Notice at the top of the app

If a change could not be saved, a notice appears at the top. Check the free storage on your device and make the change again.

If the data could not be loaded at startup, it is still on the device. Close the app completely and open it again. Do not reinstall it – that would remove the data – but contact support instead.

Help in the app

Where to find it: Question mark at the top right

The question mark at the top right opens this help – also offline and in all five languages. The search field searches titles, texts, paths and related words. A result jumps to the section; “Open” takes you directly to the right place in the app.

Questions that find no answer here are answered by support: support@sessionplaner.app.

Session Planer

Schedule, people, billing and online booking – explained step by step

support@sessionplaner.app · sessionplaner.app

NEXUS ID · Anthony C. Biasio · Lausen BL · Switzerland · Version 1.0 · November 2026