

A TUA GESTÃO

A Tua Gestão manual

Guides for businesses, teams and clients

Contents

1. [Welcome to the help centre](#)
2. [Getting started](#)
3. [First sign-in](#)
4. [The dashboard](#)
5. [Prepare your workspace](#)
6. [Manage your subscription](#)
7. [Using the calendar](#)
8. [Create an appointment](#)
9. [Change or cancel an appointment](#)
10. [Appointment notifications](#)
11. [Add and manage clients](#)
12. [View a client's history](#)
13. [Treatment plans](#)
14. [Intake forms](#)
15. [Client portal](#)
16. [Create and manage services](#)
17. [Organise service categories](#)
18. [Professionals and team](#)
19. [Set working hours](#)
20. [Users and permissions](#)
21. [Manage business locations](#)
22. [Settings and branding](#)
23. [Record and follow leads](#)
24. [Follow contacts in CRM](#)
25. [Your clients' payments](#)
26. [Record manual payments](#)
27. [Refund a payment](#)
28. [Review finances and reports](#)
29. [Email and notifications](#)
30. [WhatsApp](#)
31. [Training and courses](#)
32. [Create and manage cohorts](#)
33. [Add students to a cohort](#)
34. [Training certificates](#)
35. [Alumni community and mentoring](#)
36. [Equipment](#)
37. [Equipment rentals](#)
38. [Coworking: manage rooms](#)
39. [Rent a room](#)
40. [Automations](#)

Welcome to the help centre

Find practical guidance for setting up your workspace and handling everyday tasks. Choose a topic in the menu or search for what you want to do.

Where to start

1. Sign in and check that you can open the menu.
2. Prepare the services, professionals and working hours you need.
3. Add a client and create your first appointment.

The platform runs in your browser. Menus and actions depend on your plan, account permissions, configuration and workspace version. If an option is missing, ask your business administrator or [contact support](#).

Examples and screenshots in this centre use fictional data. Screenshots show the Portuguese interface; the button names below match what appears on screen.

Getting started

There is no app to install: use a browser and the access address for your business.

Prepare the essentials

Have your authorised email, services and their prices and durations, working hours and business contact details ready.

A useful order

1. Sign in and check your profile.
2. Review the workspace details and add your services.
3. Check professionals and their available hours.
4. Add a client and create an appointment.
5. Review the communications and payments you intend to use.

Team features, integrations and other modules vary by plan. When testing, use fictional data and make sure no real messages will be sent.

First sign-in

The subscription owner and other users may enter through different routes.

Business owner

1. Sign in to your A Tua Gestão account dashboard with the authorised email.
2. Once the workspace is ready and access is enabled, select **Abrir o meu espaço** (open my workspace).
3. Check that the workspace menu appears.

Team members and clients

Use the workspace address provided by the business and sign in with your authorised account, or accept the invitation you received. Clients can follow the client portal guide.

If the menu or an option is missing, check that you used the correct account. Access depends on the role and plan; the business administrator or support team can help.

The dashboard

Dashboard gives an overview of the workspace. Indicators and shortcuts vary by plan, role and available data.

After signing in, review the **Clientes** (clients), **Hoje** (today's appointments) and other cards shown. Use the **Agenda** and **Clientes** shortcuts to open those modules. The upcoming appointments area helps you follow planned visits.

If you sign in as a client, you will see your own area with appointments and, when available, plans and payments.

Prepare your workspace

Start by checking the details and availability used for appointments.

1. In **Espaços** (locations), when available to your plan and role, review the name, contact details, address and time zone.
2. In **Serviços** (services), check each service's categories, duration and price.
3. In **Agenda** (calendar), open **Horários** (working hours) and check professional availability.
4. In **Utilizadores** (users), an administrator can review the roles of people already registered.

A primary location may be created during activation even when the menu for managing multiple locations is not included in your plan. Also check the email and payment settings you intend to use.

Manage your subscription

Your A Tua Gestão subscription is separate from payments your business receives from its clients.

1. The account owner signs in to the central A Tua Gestão dashboard.
2. Open **Pagamentos** (payments) to see the subscription, billing details and available options.
3. Use **Portal de Faturação** (billing portal) to manage the payment method, see documents or cancel, as offered on screen.

Plan and tax-detail changes follow the checks shown in the dashboard. A plan change only takes effect after the necessary confirmation. If access is suspended or a payment is pending, follow the message on screen or contact support.

How plans differ

- **Começar:** calendar, clients, services and appointments in the client area.
- **Essencial:** adds options including leads, CRM, finance, manual payments, treatment plans and automations.
- **Pro:** adds, for example, WhatsApp, exports, online payments after setup, training, equipment and coworking.
- **Studio:** includes higher capacity and advanced options such as a custom domain and community and mentoring features when available in your workspace version.

Limits, permissions, settings and the workspace version also affect the options you see. Check the [current plan comparison](#) and contact support if an expected feature is missing.

Using the calendar

Agenda (calendar) shows appointments and helps you follow your business's availability.

Use the controls next to the calendar to move between dates and choose month, week, day or list views. Open **Filtros** (filters) to narrow what you see, for example by professional or status, when those options are available.

Select an appointment to see details and actions. Use **Nova marcação** (new appointment) to create one, **Horários** (working hours) to review availability and **Bloqueios de agenda** (calendar blocks) to manage unavailable periods, subject to access.

Agenda
Gira as marcações do espaço

Bloqueios de agenda

Horários

Nova marcação

Filtros
Todas as marcações visíveis

Calendário de marcações
40 marcações • 7 feriados Vários espaços Feriados

< Hoje >

26 Out - 1 Nov 2026

Mês Semana Dia Agenda

	SEG 26 out	TER 27 out	QUA 28 out	QUI 29 out	SEX 30 out	SÁB 31 out	DOM 1 nov
08:00		Helena Almeida - Depilação Laser - Axilas - Lisboa (UTC+0) 08:30 - 08:50					Todos os santos - Portugal 00:00 - 23:59
09:00	Beatriz Oliveira - Depilação Laser - Pernas Inteiras - Lisboa (UTC+0) 09:00 - 10:00	Daniela Costa - Limpeza de Pele Profunda - Lisboa (UTC+0) 09:00 - 10:00	Orianda Teixeira - Limpeza de Pele Profunda - Lisboa (UTC+0) 09:30 - 10:30				Todos os santos - Portugal 00:00 - 23:59
10:00	Beatriz Oliveira - Depilação Laser - Pernas Inteiras - Lisboa (UTC+0) 09:00 - 10:00	Rita Azevedo - Peeling Químico - Lisboa (UTC+0) 10:15 - 11:00 Mariana Sousa - Depilação Laser - Pernas Inteiras - Lisboa (UTC+0) 10:00 - 11:00 Daniela Costa - Limpeza de Pele Profunda - Lisboa (UTC+0) 09:00 - 10:00	Orianda Teixeira - Limpeza de Pele Profunda - Lisboa (UTC+0) 09:30 - 10:30	Ivo Martins - Peeling Químico - Lisboa (UTC+0) 10:00 - 10:45			Todos os santos - Portugal 00:00 - 23:59

Weekly calendar with fictional appointments and the Nova marcação button, shown in Portuguese

Create an appointment

Before you start, check that a client, service and professional with available hours exist.

1. Open **Agenda** (calendar) and select **Nova marcação** (new appointment).
2. Choose the **Cliente** (client) and one or more **Serviços** (services).
3. Select the **Profissional** (professional) and **Espaço** (location).
4. Choose **Data** (date) and a **Horário disponível** (available time).
5. Review payment mode and notes, if applicable, and select **Criar marcação** (create appointment).
6. Check the result and find the appointment in the calendar.

If no time is shown, review the professional's hours, location and service duration. If there is a conflict, follow the message and choose another time. Creating an appointment does not guarantee that a message was delivered: check the displayed status.

Change or cancel an appointment

1. In **Agenda**, select the appointment to open its details.
2. To change its date, time or other details, choose **Editar** (edit), make the changes and save.
3. To update the visit, use the actions offered, such as **Confirmar** (confirm), **Iniciar** (start) or **Concluir** (complete). Available actions depend on the current status.
4. To cancel, select **Cancelar** when available and check the updated status.

Eliminar permanently deletes the appointment; it is not the same as cancelling. Check the consequences before deleting. Depending on the plan and workflow, completing a visit may show payment options.

Appointment notifications

Confirmations and reminders help keep clients informed. Availability, sending and the channel depend on your plan, contact details and configured integrations.

After creating an appointment, read the result shown to see whether an email or message was sent. A sent status does not necessarily mean it was delivered or read.

If a message does not arrive, check the client's contact details, the channel configuration and the status in **Email** or **WhatsApp**, when those modules are available. Contact support if the problem continues.

Add and manage clients

Clientes (clients) holds your client records and lets you find, edit and inspect each person.

Add a client

1. Open **Clientes** and select **Novo cliente** (new client).
2. Enter **Nome completo** (full name) and **Telefone** (phone), including the country code. Both are required.
3. Add an email if available. Email is optional when creating the record, but is needed to invite the person to the client portal.
4. If the person requests tax details on an invoice, select **Quero NIF na fatura** and complete the requested fields.
5. Select **Criar cliente** (create client) and check that the record appears in the list.

If you do not enter an email, the list may show a temporary address ending in `.invalid`. It cannot receive messages: edit the client and add a real email before inviting them to the portal.

Find or change a record

Search by name, email or tax number. Use **Ver detalhes** (view details) to open the record or **Editar cliente** (edit client) to update it. Deactivation and deletion depend on permissions and should be used carefully.

Voltar

Helena Almeida

Ativo

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Informações pessoais

Nome

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+351912000007

Data de nascimento

15 de janeiro de 1998 (28 anos)

NIF

-

Última visita

27 de outubro de 2026

Nova marcação

Editar cliente

Detalhes do registo

Cliente desde

27 de outubro de 2026

Última atualização

27 de outubro de 2026

Marcações recentes

Data	Serviço	Estado
29/10/2026, 14:30	Depilação Laser - Pernas Inteiras	Marcada
27/10/2026, 08:30	Depilação Laser - Axilas	Concluída
14/10/2026, 15:00	Limpeza de Pele Profunda	Concluída
14/09/2026, 14:30	Drenagem Linfática - Facial	Cancelada

A fictional client record with personal information and recent appointments, shown in Portuguese

14 / 44

View a client's history

Open **Clientes**, find the person and select **Ver detalhes** (view details). The record brings together information and recent appointments; visible details and actions vary by role and available modules.

Use **Editar cliente** (edit client) to correct details and **Nova marcação** (new appointment), when available in the record, to start an appointment for that client. Check you have the correct record before making changes.

Treatment plans, payments and additional records only appear when available and permitted. Handle personal information confidentially.

Treatment plans

A treatment plan organises a package of sessions for a client. Availability depends on the subscription plan and user permissions.

Create a plan

1. In **Clientes**, find the person and choose **Editar cliente** (edit client).
2. In **Planos de tratamento** (treatment plans), choose **Novo plano** (new plan) or **Criar plano** (create plan).
3. Select the service and enter the name, number of sessions and requested price.
4. Review the amounts and choose **Criar plano de tratamento** (create treatment plan).

When creating an appointment, you can associate a compatible plan if the option is offered. The session is counted when the appointment is completed. The client can also view their plans in the client portal when included and authorised.

Intake forms

An intake form collects information supplied by the client. Availability and access depend on the user's role and the workspace configuration.

1. Open the person in **Cientes** and find the **Ficha de anamnese** (intake form) options.
2. Enter only the information needed and check it before saving.
3. When offered, follow the signature request and form status.

Health information is sensitive: limit access to authorised people. A Tua Gestão supports business operations and does not replace clinical software.

Client portal

The client portal lets a person view their own appointments and, when available, treatment plans and payments.

Invite a client

1. In **Clientes**, check that the record is active and has a valid email.
2. On that person's row, select **Convidar para o portal do cliente** (invite to the client portal), if your role offers that action.
3. Ask the person to accept the invitation and sign in with the same email.

Make an appointment as a client

1. Open the address provided by the business and sign in.
2. Open **Marcações** (appointments) and select **Nova marcação** (new appointment).
3. Select the services, professional, location, date and available time.
4. Review the details and confirm. Find the appointment in your list.

To cancel, open the appointment and use **Cancelar** when available. Options depend on the workspace rules, plan and appointment status. If you cannot sign in or find a time, contact the business.

View your health record

From the menu, open **Ficha de saúde** (health record). Read the consent text: if you wish to authorise the described processing, select the checkbox and choose **Registar consentimento** (record consent). With active consent, you can complete the necessary fields and choose **Guardar ficha** (save record). **Retirar consentimento** (withdraw consent) is available on the same page. If consent cannot be recorded, contact the business.

Planos (plans) and **Pagamentos** (payments) may also appear in the menu, depending on the plan and available records.

 **Nova marcação**

Escolha serviço, profissional, espaço e horário disponível.

Serviços

☐ **Peeling Químico**
45 min - €85.00

☒ **Limpeza de Pele Profunda**
60 min - €65.00

☐ **Depilação Laser - Buço**
15 min - €29.00

☐ **Depilação Laser - Costas**
45 min - €75.00

1 selecionado(s) · 60 min · €65.00

Profissional

Ana Rodrigues

Espaço

A Tua Gestão Lisboa (Lisboa)

Data

29/10/2026

Horário disponível

Horários no fuso horário do espaço

14 horários

14 disponíveis

09:00
10:00

09:30
10:30

10:00
11:00

10:30
11:30

11:00
12:00

11:30
12:30

12:00
13:00

12:30
13:30

13:00
14:00

13:30
14:30

14:00
15:00

14:30
15:30

15:00
16:00

15:30
16:30

16:00
17:00

16:30
17:30

Example of the new appointment window in the client portal, with fictional data and Portuguese labels

19 / 44

Create and manage services

Services describe what your business offers and are used when creating appointments.

Create a service

1. Open **Serviços** and select **Novo serviço** (new service).
2. Fill in **Nome** (name), **Categorias** (categories), **Duração (minutos)** (duration) and **Preço (€)** (price).
3. Add a description if useful and select **Criar serviço** (create service).
4. Check that the service appears in the list and is available for use.

To change a service, open its edit action, review the fields and save. Categories help organise the list. Creation and the number of services depend on the role and plan limits.

Organise service categories

Categories group services so they are easier to find.

1. In **Serviços**, choose **Gerir categorias** (manage categories).
2. Select **Nova categoria** (new category) and complete the requested details.
3. Save, then select the category when creating or editing a service.

When changing or removing a category, review the consequences shown on screen and check that services remain organised as intended.

Professionals and team

Professionals are the people who may appear as appointment options, depending on their role and workspace configuration.

An administrator can review existing users in **Utilizadores** (users) and check their **Perfil** (role). To set a professional's availability, open **Agenda** and then **Horários** (working hours).

Adding team members and user limits depend on your plan and account access process. If you need to add someone and cannot find the option, contact support. You do not need to share another person's account.

Set working hours

Working hours help determine which times are available for appointments.

1. In **Agenda**, choose **Horários** (working hours).
2. Select the professional, when your account allows it.
3. Review working days and intervals and make the necessary changes.
4. Select **Guardar horários** (save hours) and check the success message.

For a specific unavailable period, see **Bloqueios de agenda** (calendar blocks). Offered times also depend on the location, blocks and service duration. Check the location's time zone before booking.

Users and permissions

In **Utilizadores** (users), an administrator can review registered accounts, search by name and check their status and role.

Change an existing account's role

1. Open **Utilizadores** and find the person.
2. In the **Perfil** (role) column, select the appropriate role from the options shown.
3. Check that the person can perform only the tasks they need.

Administrators, managers, receptionists, professionals and clients have different access. The plan can also limit modules and capacity. To add someone when there is no option in the dashboard, contact support.

Manage business locations

Espaços represents the business's locations. It is different from **Coworking**, which manages rooms and rentals.

When the module is included and your role has access, open **Espaços** to review locations. Use **Novo espaço** (new location) to create one and complete the requested details, including the time zone. To change a location, use the edit action in the list.

Check the address and time zone before using a location for appointments. Your plan may limit the number of locations; a single-location plan can use the primary location created at activation without showing this menu.

Settings and branding

Available settings depend on your plan and role. You may find business details in **Espaços** (locations) and visual customisation in **Branding**, when available.

In **Branding**, an administrator can review presentation options and save changes. For working hours use **Agenda → Horários**; for communications and payments, see their respective modules.

Payment and integration credentials are sensitive. Enter them only in the appropriate fields and never share them in messages or screenshots.

Record and follow leads

A lead is a contact who has expressed interest and is being followed up. The module depends on the plan and permissions.

1. Open **Leads** and select **Novo lead** (new lead).
2. Enter the contact details and source using the fields shown.
3. Choose **Criar lead** (create lead) and follow the card on the board.
4. Use search to find a contact; open the card to review or update details.

When conversion is available, check the details before selecting **Converter em cliente** (convert to client). First check whether the person already has a record.

Follow contacts in CRM

Leads shows commercial follow-up of contacts; **CRM** brings together relationship indicators and client information. Both depend on the plan and role.

On the leads board, follow cards and update the stage using the options available. Open a card to review its details and next contact. In **CRM**, review indicators and clients who may need follow-up.

Some communication actions can send real messages. Check recipients and content before confirming any send.

Your clients' payments

The **Pagamentos** (payments) module, when included in your plan, helps you follow payments associated with your business. It is separate from your A Tua Gestão subscription.

1. Open **Pagamentos** and review **Pagamentos recentes** (recent payments).
2. Check the client, amount, method and status before opening details.
3. For an eligible manual payment, use the confirmation action shown. For Stripe payments, synchronisation and refunds depend on configuration and payment status.

Online payments require separate setup. Saving credentials does not confirm processing is operational; follow the dashboard guidance and verify the flow before using it with clients.

Record manual payments

A manual payment records a payment received outside online processing, such as a payment at the premises, when the feature is available.

When completing an appointment, follow the **Registrar pagamento** (record payment) options shown. Check the amount and method before confirming. In **Pagamentos**, review the record's status and use manual confirmation when available.

A manual record does not charge the client automatically. First check that you received payment through the agreed method.

Refund a payment

A refund can return money to a client. The option depends on the payment method, status and your permissions.

1. Open **Pagamentos** and find the correct transaction.
2. If **Reembolsar** (refund) is available, open it and choose **Reembolso total** (full refund) or **Reembolso parcial** (partial refund).
3. Check the amount and information shown before confirming.
4. Review the details and status to follow the outcome.

Do not repeat an operation whose outcome is uncertain. If the status is unclear, consult the payment provider or contact support.

Review finances and reports

In **Financeiro** (finances), authorised users can review revenue indicators and reports available in their plan.

Choose the period and filters shown to analyse the data. When included in the plan, reports offer options such as **Exportar receita (CSV)** (export revenue) and **Exportar pagamentos (PDF)** (export payments). Check the period and content before downloading.

Displayed figures depend on the records and statuses available. For questions about amounts or tax documents, check with your business's finance contact.

Email and notifications

Email can be used for messages such as confirmations and reminders, depending on the plan and configuration. The **Email** menu, when available to your role, lets you review channel information.

Check records and displayed statuses when investigating a message. Confirm the recipient's address and configuration before trying again. Sent, delivered and read are different statuses; not every provider supplies all of them.

Before sending communications, review the recipients, content and applicable preferences.

WhatsApp

WhatsApp lets you manage messages through the channel when it is included in the plan and correctly configured.

1. Open **WhatsApp** and check the connection status.
2. If offered, use **Ligar WhatsApp** (connect WhatsApp) or **Continuar configuração** (continue setup) and follow the provider's instructions.
3. Review statuses under **Mensagens recentes** (recent messages). **Nova mensagem** (new message) starts a send when available.
4. Review settings and templates before using automatic messages.

Connection, approved templates and provider limits can affect sending. A send status does not confirm that a message was read.

Training and courses

Formações (training), when included in the plan, brings courses, cohorts and students together.

1. Open **Formações** and choose **Novo curso** (new course).
2. Complete the requested course information and save.
3. Open the course to see options such as **Turmas** (cohorts) and **Materiais** (materials).
4. Create a cohort and add students using the options available.

Content, enrolment and certificate options depend on permissions and the course configuration.

Create and manage cohorts

A cohort associates a group of students with a course and its schedule.

1. In **Formações**, select **Nova turma** (new cohort), or open a course and choose that action.
2. Choose the course, complete the details and schedule shown, then select **Criar turma** (create cohort).
3. Open the cohort to review sessions and available management options.

Check dates and capacity before adding students. Changing or deleting a cohort may affect associated records; read the confirmation before continuing.

Add students to a cohort

1. Open **Formações** and find the relevant cohort.
2. Use **Adicionar alunos** (add students) when available.
3. Select the people and cohort in the form, review the selection and confirm.
4. Open the cohort to follow its students and available sessions.

If the person does not yet exist, you may need to create their record first. Training-related details and payment options depend on configuration and permissions.

Training certificates

Certificates depend on the plan, course and conditions applicable to the training.

From **Formações** or the course details, open the available **Certificados** (certificates) options. In the certificate list, check the student, course and status before downloading an available file.

If an expected certificate is missing, check the course conditions and account access with the person responsible for training.

Alumni community and mentoring

These advanced areas may be available on the **Studio** plan, depending on your workspace version and permissions. They let you find alumni, view events and request guidance from an available mentor.

Open the areas

Sign in to your workspace. If the options do not appear in the menu, add one of these paths to your workspace address:

- `/dashboard/ex-alunos` for **Comunidade de ex-alunos** (alumni community);
- `/dashboard/eventos-ex-alunos` for **Eventos da comunidade** (community events);
- `/dashboard/mentoria` for **Programa de mentoria** (mentoring programme).

Use the same domain where you signed in, followed by the path. If you cannot open an area, check your plan and access with your administrator or support.

Find people or events

In **Comunidade de ex-alunos**, search by name, area or company and, if useful, filter by location or mentoring availability. In **Eventos da comunidade**, review the details and select **Inscriver-se** (register) when an event is available.

Request mentoring

1. In **Programa de mentoria**, choose **Pedir mentoria** (request mentoring).
2. Select an available mentor, enter focus areas, and choose the communication preference and frequency.
3. Add notes if you wish and select **Enviar pedido** (send request).
4. Follow the status under **As minhas mentorias** (my mentoring). If no mentors are available, contact the person responsible for training.

Equipment

The **Equipamentos** (equipment) module, when available, helps organise equipment and its rentals.

1. Open **Equipamentos** and select **Novo equipamento** (new equipment).
2. Complete the requested details and choose **Criar equipamento** (create equipment).
3. Review each item's status and available actions in the list.

Before changing availability or removing equipment, review the rentals and consequences shown on screen. Access depends on your plan and role.

Equipment rentals

When available, a rental associates equipment with a client and a period of time.

1. Open **Equipamentos** and find **Alugueres** (rentals).
2. Select **Novo aluguer** (new rental), choose the requested details and review the period.
3. Choose **Criar aluguer** (create rental) and check the record in the list.

Open the details to follow the status and any documents or payments shown. Check availability before agreeing the rental with the client.

Coworking: manage rooms

Coworking manages rooms and their rentals. Rooms are different from business locations in **Espaços**.

1. Open **Coworking** and choose **Nova sala** (new room).
2. Complete the requested details and select **Criar sala** (create room).
3. Review the list and its edit or availability options.

The module and actions depend on the plan and permissions. Before deactivating or deleting a room, read the impact shown for existing rentals.

Rent a room

1. Open **Coworking** and select **Novo aluguer** (new rental).
2. Choose the room, client and period in the fields shown.
3. Check availability and rental details, then select **Criar aluguer** (create rental).
4. Use **Alugueres** (rentals) to follow the record.

If a conflict appears or no availability is shown, choose another period or review blocks. Payment options depend on the business configuration.

Automations

Some operations can use automations, subject to plan, permissions and configuration. The existing automations area relates to equipment-rental operations.

When available in your workspace, review the automations and their status before changing a rule. Check actions and recipients carefully: an active automation may initiate communications or other tasks.

If you cannot find the option, check availability with your administrator or support. Do not assume an automation is active merely because it is included in the plan.