

PJFC Photo *user manual.*

How to set up and run your studio in PJFC Photo, the all-in-one CRM for photography studios. Written for owners, managers and staff.

Last updated 8 October 2026 · Screenshots use a made-up demo studio, "Harbour Light Sydney".

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1. Quick start

Ten steps from sign-up to your first booking. Each one is covered in detail later in this manual.

1. **Sign up** at app.pjfc-solutions.com/signup. During the pilot you need an invite code.
2. **Confirm your email** from the link we send you. The link works for 3 days.
3. **Sign in** and set up your second sign-in step (authenticator app, email code or Face ID).
4. **Follow the setup wizard** (Studio setup → Setup). Do the steps in any order.
5. **Add your studio's details and logo**. They go on invoices, messages and booking pages.
6. **Set your packages, prices and shoot times**. These drive bookings and invoices.
7. **Import your clients** from a spreadsheet or GoHighLevel. Nobody is sent anything.
8. **Connect Stripe, Twilio and email** in Connections, then add your staff.
9. **Check the Shadow log**. Sending starts switched off, so you can see exactly what would go out.
10. **Switch sending on** from the Shadow log when you're happy. You're live.

Tip: Want to practise first? On the Setup page, click **Make a demo studio to practise in**. It has made-up clients and never sends anything.

2. What you need

- **A computer, tablet or phone with a modern browser.** Chrome, Safari, Edge or Firefox. PJFC Photo is hosted, so there's nothing to install.
- **An email address** for each person who signs in. Every person gets their own login.
- **A phone for the second sign-in step.** An authenticator app (such as Google Authenticator or 1Password), or Face ID / Touch ID. A code by email also works.
- **A Stripe account** to take card payments. Payments go straight into your own Stripe account, and Stripe charges its own fees.
- **A Twilio account and number** to send and receive texts. Twilio bills you directly for texts.
- **A studio mailbox** (for example hello@yourstudio.com.au) and its server details, so emails go from your address and replies come back into Messages.
- **Access to your domain's DNS** (or the person who looks after your website) if you want to send email from your own domain. Recommended.
- **Your client list as a CSV file**, or a GoHighLevel private integration token, if you're moving from another system.

You can start without Stripe, Twilio or email. Until they're connected, nothing is sent and no card is charged.

3. Sign-up and sign-in

Sign up

1. Go to **app.pjfc solutions.com/signup**.
2. Enter your **business name**, **your name**, **email** and a **password of at least 12 characters**.
3. Enter your **first studio's name** and choose its **time zone** (Perth, Darwin, Adelaide, Brisbane, Sydney / Canberra, Melbourne, Hobart or New Zealand).
4. During the pilot, enter the **invite code** you were given. Sign-up is invite-only until the pilot ends.
5. Tick to agree to the terms of service and privacy policy, then submit.

Your business, your owner login and your first studio are created straight away. Each studio gets its own private database.

Confirm your email

We email you a link. Click it to confirm your address. The link works for **3 days**. You can't sign in until you've confirmed. If the email doesn't arrive, check your junk folder, or ask for it to be sent again from the sign-up page.

Second sign-in step

Everyone confirms it's them one more way after their password. The first time you sign in, you choose how:

- **Authenticator app**. Scan the QR code with your app, then type the six-digit code it shows.
- **Code by email**. We email you a six-digit code each time.
- **Code by text message**. Only if your login has a mobile number.
- **Face ID / Touch ID (passkey)**. The quickest and safest way. Add it after your first sign-in: open **Account** → **Sign-in security** and click **Add Face ID / Touch ID**. On a desktop without Touch ID, choose "use a phone" and scan the code with your phone.

Tick **Remember this device for 30 days** when you sign in and that device won't ask again for 30 days. The sign-in page always offers your other ways too, in case you don't have your phone.

To change your password or your usual way, open **Account** → **Sign-in security**. You can also forget remembered devices there.

4. Trial, licence and subscription

Free trial

Every new business gets a **14-day free trial**. The trial includes 1 studio and up to 3 staff logins. The Setup page and Billing page show the date your trial ends.

Plans

Plan	Studios	Staff logins
Solo	1	3
Studio	3	10

Prices are on pjfcsolutions.com/apps/photo/. Texts (Twilio) and card fees (Stripe) are separate: those providers bill you directly.

Buy and enter your licence key

1. In PJFC Photo, open **Billing** (owner only) and click **Choose a plan**. Or go to pjfcsolutions.com/apps/photo/.
2. Buy the plan. Your licence key is emailed to you and shown in your PJFC Solutions account.
3. Back in **Billing**, paste the key into **Licence key** and click **Add licence**.
4. Billing now shows your plan. To change cards or see invoices, click **Invoices and card (your PJFC Solutions account)**.
5. Billing also has the **Your data** panel, where the owner can download everything (see [section 11](#)).

Dashboard
EVERY DAY
Leads
Leads to review
Messages 3
Mailbox
Tasks
Diary
Roster
Google reviews
Clients
SALES AND MONEY
Sales pipeline
Invoices
Payment plans
Gift vouchers
Discount codes
Booking links
Products

Harbour Light Sydney
Owner

Quick

Switch studio
Harbour Light Sydney

Billing

Harbour Light Portraits: Free trial plan, free trial until 22 Oct 2026.

Your plan

Studios: 1 of 1 · Staff logins: 1 of 3

PLAN	STUDIOS	STAFF LOGINS
Solo	1	3
Studio	3	10

Prices and plans are on pjfcsolutions.com/apps/photo. Texts (Twilio) and card fees (Stripe) are billed to your own accounts by those providers.

Choose a plan

Invoices and card (your PJFC Solutions account)

Licence key

After buying, your licence key is emailed to you and shown in your PJFC Solutions account. Enter it here.

Licence key

Add licence

Your data

Download everything your business has in PJFC Photo (every studio: clients, enquiries, bookings, invoices, payments, messages, notes, products and uploaded documents) as a zip or spreadsheet (CSV files). You need this to continue and for 90 days after cancellation.

Ask Claude

Billing: your plan, what you're using, and where to enter your licence key.

If your trial or subscription ends

- PJFC Photo checks your licence once a day.
- If your trial ends without a licence, or your subscription ends or a payment fails, you get **7 days' grace**. Billing shows a red notice asking you to renew.
- After the 7 days your account is **paused**: staff can't sign in and nothing is sent.
- Your data is kept**. Renew and enter your key, and you carry on where you left off.

To cancel, see [section 11](#).

5. Tour of the screen

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Good to see you, Alex
Harbour Light Portraits, +61491570156

Leads board Add client

18
Enquiries in the last 7 days

16
In the calling pool (Call 0 to 9)

13
Booked in the last 30 days

0
Flagged for review

Overdue leads below Call 10, no call for a week or more

Matilda Chen Call 3 9 days

Recently added clients

<u>Jordan Patel</u>	9 Oct 2026
<u>Mia Fernando</u>	9 Oct 2026
<u>Charlotte Anderson</u>	8 Oct 2026
<u>Amelia Ryan</u>	8 Oct 2026
<u>Olivia Nguyen</u>	8 Oct 2026
<u>Mia Hall</u>	7 Oct 2026
<u>Evie Scott</u>	7 Oct 2026
<u>Isla Clarke</u>	7 Oct 2026

Missed callbacks and follow-ups over an hour late

No missed callbacks.

Latest activity

- Alex Demo imported contacts
9 Oct 2026, 12:19 AM
- Demo data demo data filled studio
9 Oct 2026, 12:10 AM
- Alex Demo updated packages
9 Oct 2026, 12:05 AM
- Alex Demo updated settings
9 Oct 2026, 12:05 AM

Ask Claude

The dashboard: key numbers, overdue leads, missed callbacks, new clients and latest activity.

Menu (left)

The menu is grouped so daily work comes first. You only see what your role allows.

- **Dashboard:** your home page.
- **Every day:** Leads, Leads to review, Messages, Mailbox, Tasks, Diary, Roster, Google reviews and Clients.
- **Sales and money:** Sales pipeline, Invoices, Payment plans, Gift vouchers, Discount codes, Booking links and Products.
- **Results:** Reports and Insight.
- **Messages:** Spam numbers, Message templates, Follow-up schedules, Shadow log and Test leads.
- **Staff:** Staff access, Roles and Staff mailboxes.
- **Studio setup:** Setup, Studio details, Packages and prices, Connections, Settings, Website, Activity log, AI helper and Billing.

Top bar

- **Studio name** and the coloured stripe show which studio you're in.
- **Search:** type a name, phone number or email. Choose **Quick** for clients, or **Everything** to search wider.
- **Switch studio** appears if you work in more than one studio.
- **Account:** change your password and sign-in security, or sign out.

Bottom of every page

- **Ask Claude** (bottom right): the AI helper. See [Ask Claude](#).
- **Report a problem**: tell the PJFC Photo team something isn't right. It records the page you were on.

On a phone, the menu moves to a bar at the bottom of the screen.

6. How to

Step-by-step guides for everyday jobs. Owners and managers do the setup jobs. Everyone uses the daily ones.

6.1 Setup wizard

The setup wizard is a checklist of eight steps. It opens after your first sign-in. Find it any time in **Studio setup** → **Setup** (owner only).

1. Open **Setup**. Each step shows a tick when it's done.
2. Click **Start** (or **Change**) on a step to open its page. Save, and you come back to the checklist.
3. For steps you only need to check, such as shoot times or welcome messages, click **Mark as checked**.
4. When you're finished, click **I'm done for now: go to the dashboard**. You can come back any time.

The eight steps: studio details and logo; packages, prices and types of shoot; shoot times and office hours; products; bring your clients across; your team; connections; check your welcome messages.

The screenshot shows the 'Set up Harbour Light Sydney' setup wizard. The interface has a sidebar on the left with navigation links: Dashboard, EVERY DAY, Leads, Leads to review, Messages (5), Mailbox, Tasks, Diary, Roster, Google reviews, Clients, SALES AND MONEY, Sales pipeline, Invoices, Payment plans, Gift vouchers, Discount codes, Booking links, and Products. The main content area is titled 'Set up Harbour Light Sydney' with a subtitle 'Owner'. It includes a search bar and a 'Quick' dropdown menu. A banner indicates 'Free trial until 22 Oct 2026'. The setup steps are listed in a vertical stack:

- 1 Your studio's details and logo**: Your name, phone, email, address and logo go on invoices, messages and the pages your clients see. (Change)
- 2 Packages, prices and types of shoot**: What clients book and pay for: session fee, deposit, headshots and so on. (Change)
- 3 Shoot times and office hours**: Online bookings only offer these times. (Mark as checked, Start)
- 4 Products you sell (albums, wall art, digital files)**: For orders and invoices, and for P3FC Reveal in the viewing room. (Change)
- 5 Bring your clients across**: Import your client list from a spreadsheet or your old system's export (CSV). Nobody is sent anything. (Change)
- 6 Your team**: Give each person their own login and role. Everyone signs in with a second step. (Start, Ask Claude)

The setup wizard. Do the steps in any order.

6.2 Studio details and logo

1. Open **Studio setup** → **Studio details**.
2. Enter the studio name, business name on invoices (if different), legal entity, ABN, phone, email, address and website.
3. Check the **time zone**. All times and dates in the studio use it.

4. Enter the first name that signs your welcome messages.
5. Choose a **studio colour**. It's the stripe that shows which studio you're in.
6. Upload your **logo** (PNG or JPEG, up to 3 MB), then click **Save**.

These details appear on invoices, messages and the pages clients see (booking, gift vouchers and payments).

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Studio details

On your invoices and messages, and on the pages your clients see (booking, gift vouchers, payments).

Studio name	Business name on invoices (if different)
Harbour Light Sydney	Harbour Light Portraits
Legal entity (e.g. Smith Portraits Pty Ltd)	ABN
Studio phone	Studio email
0491 570 156	hello@harbourlight.example.com
Studio address	
12 Example St, Newtown NSW 2042	
Website	Time zone
https://harbourlight.example.com	Sydney / Canberra (NSW, ACT)
Welcome messages signed by (a first name)	Studio colour (the stripe that shows which studio you're in)
Alex	<input type="color" value="#00728f"/>
Logo (PNG or JPEG, up to 3 MB)	
Choose file No file chosen	

Ask Claude

Studio details.

6.3 Packages and prices

Packages are what a client is booked on, such as a session fee, a deposit, a special offer or headshots. Booking one makes its invoice straight away.

1. Open **Studio setup → Packages and prices**.
2. For each package, tick **Offer it**, then set its name, price (including GST) and the line shown on the invoice.
3. Set the **cancellation or rescheduling fee** (0 for none).
4. If you use the gift card offer package, set the credit it gives on the client's order.
5. List your **types of shoot**, one per line (for example Portrait, Family, Newborn).
6. Click **Save**.

Deposits are credited on the client's later order automatically. Products you sell at the viewing (albums, wall art, files) go in Products, not here.

Harbour Light Sydney

Owner

Search name, email or phone...

Quick

Dashboard
EVERY DAY
Leads
Leads to review
Messages 3
Mailbox
Tasks
Diary
Roster
Google reviews
Clients
SALES AND MONEY
Sales pipeline
Invoices
Payment plans
Gift vouchers
Discount codes
Booking links
Products

Packages and prices

What a client is booked on. Booking one makes its invoice straight away; once it's paid, the appointment takes its colour in the diary. Prices include GST. Products you sell at the viewing (albums, wall art, files) are in [Products](#).

OFFER IT	NAME	PRICE (\$)	LINE ON THE INVOICE	TYPE
☒	Portrait s	249.00		Session
☒	Booking c	75.00		Deposit, credited on the order
☐	Special o	100.00		Deposit, credited on the order
☒	Gift voucl	100.00		Session
☒	Free sess	\$0		Session
☐	Gift card	100.00		Deposit, credited on the order
☒	Headshot	100.00		Headshots
☐	Headshot	100.00		Headshots

Cancellation or rescheduling fee (\$, 0 for none)

Gift card offer: credit on the client's order (\$)

205.00

Ask Claude

Packages and prices. Prices include GST.

6.4 Shoot times

Online bookings only offer the times you set here.

1. Open **Diary → Shoot times & closures** (also a step in the setup wizard).
2. For each day, tick **Shoots** and type the start times, separated by commas (for example 9am, 11am, 1:30pm). Untick Shoots for a day with no shoots.
3. Set the **office and phone hours** for each day.
4. Click **Save the week**.
5. To close a day or a few days, fill in **Close a day (or a few)**: from, to (optional), why, and whether it's no shoots or office closed. Click **Close**.

6.5 Products

Products are what you sell on an order: albums, wall art, prints and digital files. They're also used by PJFC Reveal in the viewing room.

1. Open **Sales and money → Products**.
2. Click **Add product**. Enter its name, group (for example Albums or Wall art), description and price including GST. Save.
3. To load many at once, click **Import products from CSV**.
4. To stop selling one without losing its history, click **Take off sale**.

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Products

What's sold on an order, for Harbour Light Sydney only. Prices include GST. Appointment packages (session fee, deposit, gift voucher, headshots...) are set in [Packages and prices](#) and aren't products. [What's selling](#)

On sale All Import products from CSV Add product

Albums

Signature leather album, 20 images Hand-bound Italian leather, lay-flat pages.	\$1,450.00	Take off sale
Mini folio box, 10 matted prints Linen box with ten 5x7 matted prints.	\$690.00	Take off sale

Digital files

Digital collection, 10 images High-resolution retouched files.	\$750.00	Take off sale
Digital collection, all images Every retouched image from the session.	\$1,490.00	Take off sale

Prints

Gift prints, set of 6 (8x10) Fine-art paper, presentation sleeve.	\$240.00	Take off sale
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Ask Claude

Products, grouped and priced.

6.6 Importing clients from a spreadsheet or GoHighLevel

Imported clients are not treated as new enquiries. **Nobody is sent anything**, and no follow-ups start.

From a spreadsheet (CSV)

1. Export your client list as a CSV file. In Excel or Numbers: File → Export → CSV. GoHighLevel, Studio Ninja, Táve, Light Blue and Mailchimp can all export one.
2. Open **Clients → Import from a spreadsheet** (or the setup wizard step).
3. Choose the file (up to 10 MB and 20,000 clients) and click **Upload and preview**.
4. Check which column is which. PJFC Photo recognises first name, last name, full name, mobile, second phone, email, second email, postcode, street address, suburb, notes, how they found us, date added and tags. Change any that are wrong.
5. The preview shows how many are new, how many are already in PJFC Photo, and how many can't be used. Click to import.
6. Made a mistake? Click **Undo** on the import. It removes the clients that import added, unless someone has since given them a lead, booking or invoice.

Straight from GoHighLevel

1. In GoHighLevel, go to Settings → Private Integrations → Create. Tick **View Contacts** and copy the token.
2. Find your **Location ID** under Settings → Business Profile.
3. In PJFC Photo, paste both into **Or straight from GoHighLevel** and click **Read my GoHighLevel contacts**.

4. Check the preview and import, as above.

The token is used once to read your contacts and isn't kept. Nothing in GoHighLevel changes.

PJFC PHOTO

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Import clients

Bring your client list across from your old system or a spreadsheet. Save it as a CSV file (Excel and Numbers: File → Export → CSV; GoHighLevel, Studio Ninja, Táve, Light Blue and Mailchimp all export one). You'll see a preview before anything is added, and you can undo it. Imported clients get no messages.

CSV file (up to 10 MB, 20,000 clients)

[Choose file](#) No file chosen

Columns we recognise: First name, Last name, Full name, Mobile / phone, Second phone, Email, Second email, Postcode, Street address, Suburb, Notes, How they found us, Date added, Tags. You can change the matching on the next page.

[Upload and preview](#)

Or straight from GoHighLevel

In GoHighLevel: Settings → Private Integrations → Create, tick View Contacts, copy the token. Your Location ID is under Settings → Business Profile. The token is used once to read your contacts and isn't kept; nothing in GoHighLevel changes. StudioCloud, Studio Ninja and others: export your clients to a CSV file and use the form above.

Private integration token **Location ID**

[Read my GoHighLevel contacts](#)

Earlier imports

- [GoHighLevel contacts](#) · 9 Oct 2026, 12:24 AM · Alex Demo · not imported
- [clients.csv](#) · 9 Oct 2026, 12:19 AM · Alex Demo · imported (2 added)

[+ Ask Claude](#)

Import clients from a CSV file or GoHighLevel.

6.7 Adding staff and roles

1. Open **Staff → Staff access** and click **Add staff member**.
2. Enter their first name, last name, mobile and the email they'll sign in with.
3. Choose their **role in each studio**. Leave a studio on "No access" and they'll never see it.
4. Click **Add staff member**. PJFC Photo shows a temporary password once. Give it to them privately. They change it the first time they sign in, then set up their second sign-in step.

Roles: Company director or partner, Studio manager, Booking consultant, Image consultant / photographer, Production, Accounts and Marketing. The business owner (Group owner) sees every studio and Billing.

- **Roles** (Staff → Roles) shows every permission against every role, for the studio you're in. Change a tick to change it for everyone in that role.
- On a person's page you can allow or deny single permissions just for them.
- **View as** lets you see PJFC Photo exactly as someone else sees it. It's read-only and recorded in the activity log.
- Your plan sets how many staff logins you can have (see [section 4](#)).

PHOTO

Harbour Light Sydney
Owner

Search name, email or phone...

Quick

Switch studio
Harbour Light Sydney

Add staff member

First name Last name Mobile

Email, used to sign in

Studio access

Choose a role in each studio they work for. Leave a studio on "No access" and they'll never see it. [See exactly what each role can do.](#)

HARBOUR LIGHT SYDNEY No access

DEMO STUDIO No access

Add staff member Cancel

Ask Claude

Add a staff member and choose their role in each studio.

6.8 Connections: texts, card payments and email

Connections link PJFC Photo to your own accounts. Clients see your studio, and each provider bills you directly. Keys are stored encrypted and never shown again. Open **Studio setup → Connections**.

Connect Stripe (one click)

1. Click **Connect Stripe**.
2. Sign in to Stripe (or create an account) and approve the connection.
3. You come back to Connections, which shows **Connected**. Clients' payments go straight into your Stripe account, and Stripe pays out to your bank.

Advanced: instead of Connect Stripe, you can type your own Stripe keys (secret key, publishable key and webhook signing secret). The page tells you the webhook address to add in Stripe.

Twilio (texts)

1. In Twilio, go to Account → API keys & tokens. Copy your Account SID and Auth token.
2. Paste them into the Twilio section. Add a Messaging service SID if you use one (optional).
3. Enter your Twilio number (+61...) and click **Save Twilio**.

Email (your studio mailbox)

1. Enter your mail server, mailbox address and mailbox password. Add the incoming mail server if it's different.
2. Click **Save Email**. Emails to clients go from your address, and replies come back into Messages.

Send email from your own domain (recommended)

1. In **Send email from your own domain**, enter your address (for example hello@yourstudio.com.au) and add it.
2. PJFC Photo shows three DNS records. Add them where your website's DNS is kept, or send them to whoever looks after your website.
3. Click **Check**. Once the records are found, your emails go out from your own address and land in inboxes, not junk. Replies still come back to your own mailbox.

To leave a saved key in place, leave its box empty. To delete one, tick **Remove the saved one** and save.

Coming soon

- One-click **Meta**: Facebook and Instagram lead forms and messages. Coming soon
- One-click **Google** (Google Business Profile, reviews and Analytics). Coming soon
- One-click **WhatsApp**. Coming soon

PJFC PHOTO

Harbour Light Sydney
Owner

Search name, email or phone... Quick ▾

Connections

Your own accounts for texts, card payments and email: clients see your studio, and each provider bills you directly. Keys are stored encrypted and never shown again. One-click Connect buttons (Stripe, Google, Meta, WhatsApp) are coming.

Stripe: card payments, the easy way Connected
Your Stripe account acct_s1m_ef17f0a72217 is connected. Clients' payments go straight into it; Stripe pays out to your bank. Fees are Stripe's own.
[Disconnect](#)

Twilio (texts) Partly set Simulated on this server
Texts go from your own Twilio account and number, billed to you by Twilio. In Twilio: Account → API keys & tokens.
Account SID

☐ Remove the saved one
Auth token

Messaging service SID (optional)

Your Twilio number (+61...)

[Save Twilio](#)

[Ask Claude](#)

Connections: Stripe connected with one click, and the Twilio keys.

 PHOTO

Dashboard

EVERY DAY

Leads

Leads to review

Messages 3

Mailbox

Tasks

Diary

Roster

Google reviews

Clients

SALES AND MONEY

Sales pipeline

Invoices

Payment plans

Gift vouchers

Discount codes

Booking links

Products

Mailbox (e.g. hello@yourstudio.com.au)

Mailbox password

Incoming mail server, if different

Save Email

Send email from your own domain Waiting for DNS

Recommended: your emails go out from your own address (e.g. hello@yourstudio.com.au) through PJFC Photo's sending service, so they land in inboxes, not junk. Replies still come back to your own mailbox. You (or whoever looks after your website) add three DNS records once.

Sending from hello@harbourlight.example.com. Add these at your domain host (where your website's DNS is kept):

TYPE	NAME	VALUE	PRIORITY	STATUS
MX	send	feedback-smtp.ap-northeast-1.amazonaws.com	10	not started
TXT	send	v=spf1 include:amazonses.com ~all		not started
TXT	resend._domainkey	p=MIGfMA0G...		not started

Check

Remove

Back to setup

Ask Claude

Send email from your own domain: add the three DNS records, then click Check.

6.9 Leads and calling

New enquiries arrive in **Leads**. They come from your website's enquiry form (see Settings → Website), your online booking pages, and clients you add yourself.

The leads board

- New enquiries start in **Call 0**. Each call you log moves them along (Call 1, Call 2 ... Call 10+).
- Leads not booked after 10 calls move to **Aged 60, 90 and 120**.
- Use the tabs to see Calling, Aged, Maybe later, Not interested, Booked, Problem clients and To review.
- Search, or sort by newest, oldest, campaign, longest since last contact or name.

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Leads

Newest enquiry first in each column

Search name, phone or email Search

Sort by Newest enquiry first Send a test lead

Calling 19 Aged 0 Maybe later 2 Not interested 1 Booked 18 Problem clients 0 To review 0

► To book 13 who to ring and book now, and why

Columns 1-5 of 12

Call back booked	Call 0	Call 1	Call 2	Call 3
Evie Scott Open Call back 9 Oct 4:30 PM 0491 575 482 Last interaction 1 day ago Enquired 7 Oct 2026 Reason Family photos with the kids before they grow up Postcode 2230 ► Move	Charlotte Anderson Open 0491 571 160 Last interaction Today Enquired 8 Oct 2026 Reason A gift for my mum and me Promo Mother's Day Glamour Postcode 2230 ► Move	Daniel Fraser Open 0491 579 034 Last interaction 1 day ago Enquired 7 Oct 2026 Reason Updated photos of me for my 40th Promo Spring Portrait Special Postcode 2031 ► Move	Ruby O'Brien Open Discovery call booked 15 Oct 0491 570 367 Last interaction 3 days ago Enquired 3 Oct 2026 Reason A gift for my mum and me Promo Mother's Day Glamour Postcode 2048 ► Move	Lily 049 Last Enq Reas
Hannah Kaur Open Call back 9 Oct 4:30 PM 0491 576 505 Last interaction 1 day ago Enquired 5 Oct 2026 Reason Something just for me after a big year	Amelia Ryan Open 0491 572 183 Last interaction Today Enquired 8 Oct 2026 Reason Headshots for LinkedIn and our website	Grace Williams Open Discovery call booked 10 Oct 0491 576 275 Last interaction 1 day ago Enquired 6 Oct 2026 Reason A gift for my mum and me	Harper Cooper Open 0491 571 390 Last interaction 4 days ago Enquired 2 Oct 2026 Reason Family photos the kids before they	Mat 049 Last Enq Reas

Ask Claude

The leads board. Each column is a call stage.

Calling a lead

1. Click a lead to open its card.
2. Tap the phone number to call. It opens your phone or calling app.
3. Type a **call note** for the next person.
4. Log what happened:
 - **No answer / left message:** you're offered a text to send.
 - **Spoke, call back later:** pick the time, and a callback task is made.
 - **They'll call us:** the lead waits, and you get a task to check in 2 days.
 - **Booked:** opens the booking form.
 - **Maybe in the future, Not interested** (tick "Also stop marketing" if they ask), **Wrong number, Other location, Doesn't recall entering** or **Problem client**.

Calls aren't recorded, so log every call by hand from the lead card. Made a mistake in a note? Click **Fix the note** under the call.

Harbour Light Sydney
Owner

Search name, email or phone... Quick ▾

Leads / Call back booked

Evie Scott

Call back booked

Client since 7 Oct 2026, postcode 2230 (NSW)

0491 575 482
Total calls: 1 - last 8 Oct 2026, 9:37 PM - Jess Nguyen

Call note (optional)
Anything the next person should know

No answer / left message

Call back at
dd/mm/yyyy, --:-- --

Spoke, call back later

They'll call us

Booked

☐ Also stop marketing

Maybe in the future

Not interested

Doesn't recall entering

Wrong number

Problem client

First touch where they came from

Entered 7 Oct 2026, 6:33 PM

Source website

Reason Family photos with the kids before they grow up

Form Website enquiry

Postcode 2230 (NSW)

► **Form answers**

► **Consent they agreed to**

First-touch details are kept exactly as received and can't be edited.

Model release

None signed yet.

Text the link **Email the link** **Print to sign on paper**

► **Signed a printed copy? Mark it completed**

Documents scans, and photos the client sends

No documents yet.

➕ **Ask Claude**

A lead card. Log every call with one of the outcome buttons.

Tip: The **To book** list in the Diary shows who to ring next and why: replies, callbacks due, keen notes, rebooks and new enquiries not called yet.

6.10 Messages

Messages shows every client conversation in one place: texts, calls and emails.

1. Open **Messages**. **Needs reply** shows conversations waiting on you.
 2. Filter by studio inbox, your mailbox or everyone, and by type.
 3. Click a conversation, type your reply and send. Texts go through your studio's Twilio number.
 4. If no reply is needed, click ✓ **Done, no reply needed**. Tick several and click **Done for ticked** to clear many at once.
- A client who replies STOP has their marketing stopped automatically.
 - Spam number? Open it and click 🚫 **Mark as spam**. Its texts are put away, not deleted.
 - **Message templates** holds every text and email. Edit the words, or use **Edit design** for emails.
 - **Follow-up schedules** are the automatic messages (welcome, reminders, follow-ups). Switch each one on or off.

The screenshot shows the 'Messages' section of the Harbour Light Sydney software. On the left is a sidebar with various navigation links. The main content area is titled 'Messages' and includes filters for 'Showing' (Studio inbox), 'Type' (Everything), and 'Needs reply' (5). It also has a search bar and a 'Sort' dropdown set to 'Newest first'. Below the filters is a list of messages from clients. One message from Willow Russo is expanded, showing the text of the message and a 'Send' button. The interface is clean and modern, with a light blue and white color scheme.

Messages: every conversation in one place.

6.11 Diary and bookings

Book an appointment

1. From a lead choose **Booked**, or click an empty time in the **Diary**, or click **Book** on a client or in the To book list.
2. Choose the type: photoshoot, discovery call, viewing or corporate headshots.
3. Choose the package, the type of shoot, the day and the time.
4. Save. If the time clashes, you're warned and can confirm.

The booking makes its invoice automatically. The client gets the booking email and reminders (once sending is on).

Confirm, move or cancel

- Open the appointment in the Diary.
- **Confirm**, or send the confirmation text. Tomorrow's list is under **Tomorrow's confirmations**.
- **Reschedule**: pick the new time. The client is told the new time.
- **Cancel**: soft (they want to rebook, a follow-up task is made) or hard (gone).
- Mark **No-show** or **Attended**. Clicked Attended by mistake? Use **Undo attended**.

Use Day, Week and Month views, and the Show ticks to filter. Colours show what's paid.

Harbour Light Sydney
Owner

Search name, email or phone... Quick

Diary

Week of 12 Oct - 18 Oct 2026

Today 14/10/2026 Day Week Tomorrow's confirmations Shoot times & closures

Show: ☒ Photoshoots ☒ Discovery calls ☐ Cancelled

☐ Unpaid ☐ Paid: gift card offer or free ☐ Paid: session fee ☐ Paid: deposit or special offer ☐ Headshots ☐ Discovery call ☐ Viewing ☐ Call back (from a lead) ☐ No-show ☐ Cancelled

☒ Blocked out

To book 13 Hide

Who to ring and book now, and why: replies, missed calls, callbacks, keen notes, people who asked to be called about now, rebooks and new enquiries.

CALLBACK DUE

Evie Scott
Call back as agreed
Call 0491 575 482 [Book](#)

Hannah Kaur
Call back as agreed
Call 0491 576 505 [Book](#)

Jasmine Santos
Call back as agreed
Call 0491 577 528 [Book](#)

SOUNDED KEEN

Grace Williams
8 Oct: "Left a voicemail, will try again"

	Mon 12	Tue 13	Wed 14	Thu 15	Fri 16	Sat 17
	+ Who's working	+ Who's working	+ Who's working	+ Who's working	+ Who's working	+ Who's working
9am	Photoshoots 9:00 Freya Young	Discovery calls 9:00 Tahla Lee	Photoshoots 9:00 Emily White	Discovery calls 9:00 Mei Baker	Photoshoots 9:00 Indi Reid	Discovery calls
10am						10:00 Aaliyah Doyle
11am		11:00 Jess Hughes	11:00 Willow Russo	11:00 Lucy Campbell		
12pm						
1pm			1:00 Priya Murphy			
2pm	1:30 Rosa Brown	1:30 Nina Bell 2:00 Kat Wri			1:30 Maddisor Wilson	1:30 Kate Wright
3pm						
4pm						

[Ask Claude](#)

The diary in week view, with the To book list.

6.12 Online booking links

Clients can book themselves online. Open **Sales and money** → **Booking links**.

1. Choose **Where it's going**: website, Facebook post, Instagram post, a Facebook or Instagram ad, email or Google Business Profile.
 2. Add a campaign name if you like.
 3. Click **Copy** next to the link you want, and paste it into your website, post or ad.
- Links are tagged, so Reports show where each booking came from.
 - There are links for a photoshoot (any type, or one type such as Family or Newborn), each special offer, a free 10-minute discovery call and the gift voucher shop.
 - An offer's own links are the only ones that show its price. Use them only in that offer's ad or post.
 - **Your own booking links** are in your name. When a client books and pays through them, the booking counts for you.
 - Online bookings only offer your shoot times and the packages chosen in Settings.

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- Invoices
- Payment plans
- Gift vouchers
- Discount codes
- Booking links**
- Products

Harbour Light Sydney
Owner

Quick ▾

Links for the website and social media

Copy a link into the website, a Facebook or Instagram post, or an ad. Choose where it's going first: the link is tagged so Reports show where each booking came from.

Where it's going

Website (no tag) ▾

Campaign name (optional)

e.g. Spring portraits

Your own booking links (Alex Demo)

Send these to a client yourself (text, email or Messenger). When they book and pay through your link, the booking is in your name, so you get the booker bonus. Online bookings through the public links below don't earn a bonus.

Photoshoot (Portrait session)	http://localhost:8200/book/harbour_light_sydney/shoot?by=YjczNTI	Copy
Booking deposit	http://localhost:8200/book/harbour_light_sydney/shoot?offer=ZGIzY	Copy
Special offer session	http://localhost:8200/book/harbour_light_sydney/shoot?offer=ZGIzY	Copy

Book a photoshoot (Portrait session, \$249.00)

These only ever show that price.

Any type of shoot	http://localhost:8200/book/harbour_light_sydney/shoot	Copy
Portrait	http://localhost:8200/book/harbour_light_sydney/shoot?type=portrait	Copy

Ask Claude

Booking links for your website and social media.

6.13 Invoices and payments

1. Open the invoice from the client, the appointment or **Invoices**.
2. In the payment section, choose how they're paying and click **Record payment**, or click **Make payment link** to send a link:
 - **Card or bank account: charge through the CRM (Stripe).**
 - **Payment link** texted or emailed to the client.
 - **Card processed in the studio (EFTPOS machine)**, cash or bank transfer. These are recorded only.
 - **Humm** or **Payright** finance.
3. Add a discount code on the invoice if needed.
4. Use **Print / PDF** to print or save the invoice.

A booking deposit or gift card credit comes off an order as a deduction ("Less booking deposit already paid"). It is never added twice. All prices include GST.

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Harbour Light Sydney

Owner

Search name, email or phone...

Quick

Invoices

Invoice 1026

Open Sale (products ordered)

Edit Print / PDF Client card Appointment

Client Maddison Wilson

Call Text Email

Issued 6 Oct 2026 · due 23 Oct 2026

Image consultant Sarah Mitchell

Order Waiting for payment

DESCRIPTION	QTY	EACH	AMOUNT
Canvas trio 3 x 16x24	1	\$1,290.00	\$1,290.00
Gift prints, set of 6 (8x10)	2	\$240.00	\$480.00
Total (incl. GST)			\$1,770.00
GST included			\$160.91
Paid			\$400.00
Owing			\$1,370.00

Ordered at the viewing.

Terms and conditions on this invoice (product sale)

Payment plan

For the \$1,370.00 still owing.

First payment 09/10/2026

How often Fortnightly

Work it out from The instalment amou

Instalment (\$) e.g. 20

How they'll pay Type the card in next (over the phone)

The plan is live straight away. With a direct debit form, it goes out with the plan's dates and amounts filled in, and once they sign, their card or bank account becomes the plan's way of paying. With a card or bank account the CRM takes each payment; otherwise record each payment on the order and it's ticked off the plan. Payment details can be added any time.

Set up the plan

Direct debit authority

Ask Claude

The client fills in their details and driver's licence, chooses card

Payments

\$400.00 Card (charged through the CRM, Stripe)

Remove

An invoice, with the payment plan panel on the right.

6.14 Payment plans

1. Open an unpaid order invoice. In **Payment plan**, set the first payment date and how often: weekly, fortnightly or monthly.
 2. Choose to work it out from the number of payments or the instalment amount.
 3. Under **How they'll pay**, type the card in, send the client a secure link, or choose a **direct debit form** to text, email or print.
 4. Click **Set up the plan**.
- Payments are taken automatically from 7am on the day.
 - The client gets a reminder text first: 7 days before a monthly payment, 3 days before weekly and fortnightly ones.
 - A declined card is tried again 1, 3 and 7 days later. If it still fails, the client is texted and you get a task.
 - On the plan you can pause, change amounts or dates, move a missed payment, retry now, take an extra payment, swap the card or cancel. Each change needs a reason.
 - The **Waiting for card or bank** tab shows plans with nothing to charge yet.
 - **Booking fee direct debit** takes a booking fee on a set date.



PHOTO

Harbour Light Sydney

Owner

Quick ▾

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On a payment plan

Booking fee direct debit

Active

Needs attention

Waiting for card or bank (2)

Paused

Paid off

Cancelled

Name, phone, email or order number

Search

CLIENT ▾	ORDER ▾	OWING ▾	NEXT PAYMENT ▾	PLAN ▾	CARD ▾	STATUS ▾
Emily White	#1016	\$2,280.00	\$380.00 on 14 Oct 2026	\$380.00 fortnightly · 6 left	No card	Waiting: add card or bank account (not charging) Paid manually
Lucy Campbell	#1018	\$2,400.00	\$300.00 on 15 Oct 2026	\$300.00 fortnightly · 8 left	No card	Waiting: add card or bank account (not charging) Paid manually

► Best time to charge

All charged from 7am

Ask Claude

Payment plans and their status.

6.15 Gift vouchers

- Clients buy vouchers through your gift voucher shop link (in Booking links). They pay through a payment link.
- Open **Gift vouchers** to see every voucher: awaiting payment, paid and ready to book, booked with credit left, all used, and expired or cancelled.
- To book a voucher, book the **Gift voucher** package and enter its code. The voucher pays for the package it was sold for.
- Any extra credit sits on the client's file and comes off their order by itself.
- Change the voucher texts to the buyer and the person it's for in Settings.

6.16 Discount codes

A code anyone can use

1. Open **Discount codes**. Under **New generic code**, type the code.
2. Choose what it works on: anything, online bookings, gift vouchers or orders.
3. Choose dollars off or percent off, and the amount.
4. Add start and end dates and a limit on uses if you like. Click **Create code**.

A batch of one-use codes

1. Under **New batch of unique codes**, enter how many and what each code starts with.

2. Set what it works on and the discount, then click **Make and download** to get a spreadsheet to send out.

Staff can add a code to any invoice.

The screenshot shows the 'Discount codes' page in the Harbour Light Sydney owner dashboard. The left sidebar contains navigation links: Dashboard, EVERY DAY, Leads, Leads to review, Messages (9), Mailbox, Tasks, Diary, Roster, Google reviews, Clients, SALES AND MONEY, Sales pipeline, Invoices, Payment plans, Gift vouchers, Discount codes (highlighted), Booking links, and Products. The main content area is titled 'Discount codes' and includes a sub-header: 'Generic codes anyone can use (with optional dates and a limit), and batches of unique one-use codes. Codes work on online bookings, gift vouchers and orders, and staff can add one to any invoice.' There are two tabs: 'On' (selected) and 'All'. The 'New generic code' form has fields for Code (SPRING50), Works on (Anything), Discount (Dollars off), Amount (50 or 10), Starts (optional) (dd/mm/yyyy), Expires (optional, last day it works) (dd/mm/yyyy), Most uses (optional) (No limit), and Note (optional) (e.g. Spring Facebook campaign). A 'Create code' button is at the bottom. The 'New batch of unique codes' form has fields for How many (20), Start each code with (VIP), Works on (Anything), Discount (Dollars off), Amount (50 or 10), Starts (optional) (dd/mm/yyyy), and Expires (optional) (dd/mm/yyyy). A note states: 'Each code works once. You can download them as a spreadsheet to send out.' There are 'Make and download' and 'Make' buttons. At the bottom, there is a 'Generic codes' section showing 'None yet.' and an 'Ask Claude' button.

Discount codes.

6.17 Sales pipeline

The **Sales pipeline** shows every client after their shoot, from booked to picked up.

1. Open **Sales pipeline**. Clients are in columns such as Booked: shoot to come, No-show, Photographed: no outcome yet.
2. After the viewing, click **Create order**, add the products and who sold it. Credits on file come off automatically.
3. Or click **No sale** or **May order later** (with a follow-up date).
4. Orders move to In production once paid in full, then Completed and Picked up. Use **Move** to move a card by hand.



PHOTO

Harbour Light Sydney

Owner

Search name, email or phone...

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Sales pipeline

Every client after their shoot, in one place each. Record No sale or May order later here or on the appointment; orders move along by themselves as they're paid (in production only once paid in full), then staff mark them completed and picked up.

Everyone after the shoot

Orders only

Search name, phone, email or invoice no.

Search

All time

Sort by

Newest shoot / order first

Columns 1-5 of 17

Booked: shoot to come 7 Holly Kelly Shoot 22 Oct 2026 Sarah Mitchell Move Sienna Thompson Shoot 21 Oct 2026 Sarah Mitchell Move Georgia Smith Shoot 20 Oct 2026 Sarah Mitchell Move Aaliyah Doyle Shoot 17 Oct 2026	No-show 0 None.	Cancelled shoot 0 None.	Call to rebook 0 None.	Photographed, no outcome yet Kate Wright Shoot 17 Oct 2026 Sarah Mitchell Create order No sale May order later Move Maddison Wilson Shoot 16 Oct 2026 Sarah Mitchell Create order No sale May order later Move Ask Claude
--	---------------------------------------	---	--	---

The sales pipeline.

6.18 Reports and end-of-day report

1. Open **Reports**. Pick a period (today, last 7 or 30 days, this month, custom dates and more) and click **Show**.
2. Each tile says what it counts. Click **Details** to see the list behind it.
3. Use **CSV**, **PDF** or **Print** if your role allows. Every download is logged.

Reports include enquiries, campaigns, cost per lead, booking and sale, the calling pool, bookings by source, staff calls, overdue payments, the sales sheet and weekly commission.



PHOTO

Harbour Light Sydney

Owner

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Reports

Harbour Light Sydney · 10 Sep - 9 Oct 2026

End-of-day report

Staff calls

Commission sheet

Weekly commission

Overdue payments

Sales sheet

Sent end-of-day reports

Bookings by source

Last 30 days ▾

Show

CSV

PDF

Print

Enquiries

Details >

New enquiries in the period (Meta forms, the website, phone and walk-ins), by offer. One person can enquire more than once.

38

38 people · 0 from Meta

General enquiry or promotion entry

38

Top campaigns

Details >

The ad campaigns that brought in the most enquiries in the period.

6

campaigns with enquiries

Mother's Day Glamour	8
Spring Portrait Special	8
(no campaign)	7
Boudoir Confidence Shoot	6
Portrait photographer Sydney	6
Family Session \$50	3

Cost per lead, booking and sale

Details >

Ad spend (Meta and Google) in the period against what that period's enquiries became: booked, attended, bought, and the sales they made.

\$962.82

ad spend in the period (Meta and Google)

Cost per lead (from ads)	\$38.51
Cost per booking	\$87.53
Cost per sale	\$160.47
Leads → booked → bought	38 → 16 → 8
Sales from these leads	\$9,105.00
Return on ad spend	9.5x

Website

Details >

Visits, visitors, pages and where they came from and this studio's website enquiries (visitor numbers come with the Google connection).

8

website enquiries (visitor numbers: Google Analytics not connected yet)

Reasons for entering

Details >

The answers to 'why did you enter?' on the period's enquiries, and how many of each booked and bought.

7

reasons for entering, by what they led to

something just for me after a big year	6 leads · 67% booked · 3 bought (\$4,530.00)
--	--

Calling pool

Details >

Leads waiting to be called right now, by how many calls they've had. Always today's position: the dates don't change it.

19

being called now (Call 0 to 10+); not dated

Call back booked

3

Ask Claude

Reports for the last 30 days.

End-of-day report

1. Open **Reports → End-of-day report**.
2. Check your calls, bookings, sales and banking for the day.
3. Add any notes, click **Preview the email**, then **Send my end-of-day report**.

Photographers and above attach the daily banking sheet, the daily sales sheet (only if there were orders) and commission. A manager chooses who receives it in Settings.

6.19 Ask Claude (the AI helper)

Click **Ask Claude** at the bottom right of any page. Type a question, or tap  **Talk** and speak. It only uses what you're allowed to see.

- **Ask how to do something:** "How do I set up a payment plan?"
- **Open a page:** "show me Sarah Smith", "open tomorrow's diary".
- **Check things:** "did the deposit invoice go?", "check today's payment plans".
- **Search:** "texts from today", "what's booked in December".
- **Get a note or task ready:** "remind me to call Sarah back on Friday". You see what it wrote with **Confirm** and **Cancel**. Nothing is saved until you click Confirm.
- **Screenshots:** click  **Screenshot**, or paste or drag one in, and ask about it.

Claude never sends texts or emails for you. If an answer doesn't help, click **Didn't help?** and say what you were after. The owner sets a monthly spending limit in **Studio setup → AI helper**.

6.20 The send switch and Shadow log

Every studio has a master **send switch**. It starts **off**. While it's off, nothing leaves PJFC Photo: no texts, no emails. Every message is written to the **Shadow log** instead, so you can see exactly what would have gone, to whom, and why.

1. Open **Messages** → **Shadow log**.
2. Read through the messages. Fix any template wording you don't like in Message templates.
3. When you're ready, type the studio name to confirm and click **Switch sending on**.

Only the group owner can change the switch, and every change is recorded. Switch it off again the same way if you need to stop everything.



PHOTO

Harbour Light Sydney

Owner

Quick

Switch studio

Harbour Light Sydney

Shadow log

Every message the CRM would send in Harbour Light Sydney, and why it was or wasn't sent. While sending is off, nothing here has gone to anyone.

Sending is OFF for Harbour Light Sydney

Type Harbour Light Sydney

Switch sending on

WHEN	TO	MESSAGE	RULE	RESULT
8 Oct 2026, 11:35 PM	Leah Taylor SMS 0491 578 551	Hi Leah, absolutely, bring 3 outfits! Solid colours work best. We'll go through them with you on the day. Sarah	Messages reply Sarah Mitchell	Held: would have been sent Demo data: not really sent
8 Oct 2026, 2:25 PM	Jess Hughes EMAIL jess.hughes26@example.com	Re: Viewing time Hi Jess, No problem at all, we've moved your viewing to 3:30pm. See you both then! Sarah Harbour Light Portraits	Messages reply Sarah Mitchell	Held: would have been sent Demo data: not really sent
8 Oct 2026, 12:57 AM	Isla Clarke SMS 0491 573 206	Hi Isla, we'd love to have you all (dog included)! We have Saturday 10am or Sunday 2pm. Which suits? Jess	Messages reply Jess Nguyen	Held: would have been sent Demo data: not really sent
7 Oct 2026, 10:54 AM	Rosa Brown SMS 0491 579 804	Thank you Rosa! It was a joy. Enjoy it on the wall xx	Messages reply Sarah Mitchell	Held: would have been sent Demo data: not really sent

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+ Ask Claude

The Shadow log, with sending switched off.

6.21 Demo studio

1. Open **Setup** and click **Make a demo studio to practise in** (owner only).
2. Switch to it with the studio switcher at the top.

The demo studio is filled with made-up clients, leads, bookings and invoices. **Nothing in it is ever sent to anyone.** Use it to train staff or try things out. You can only have one.

6.22 More than one studio

- Each studio (location) has its own clients, diary, money, settings and private database.

- To add one, open **Setup** and click **Add another studio**. Enter its name and time zone. You're switched into it to set it up.
- Your plan sets how many studios you can have: Solo 1, Studio 3.
- Staff get a role in each studio they work in. Use **Switch studio** at the top to move between them. Everything you see is for the studio you're in.
- If a lead wants another studio, log **Other location** and pass them on. Nothing moves between studios automatically.

7. Settings reference

Where to find each setting. Most are for owners and managers.

Page	What it sets
Setup	The setup checklist, adding a studio, the demo studio.
Studio details	Name, business name, legal entity, ABN, phone, email, address, website, time zone, who signs welcome messages, studio colour, logo.
Packages and prices	Packages offered, prices, invoice lines, cancellation fee, gift card credit, types of shoot.
Shoot times & closures (Diary)	Shoot start times, office hours, closed days.
Products	What's sold on orders and their prices.
Connections	Connect Stripe, Stripe keys, Twilio, studio mailbox, send email from your own domain.
Settings	Invoice details, Twilio number, commission %, monthly sales budget, invoice due days, booker bonus, end-of-day recipients, invoice terms, gift voucher texts, online booking packages, payment plan self-service, commission approval, discovery call hours, Google review link, lead rules, welcome delay.
Website	The enquiry form code to give your web designer.
Message templates	Every text and email, quick replies, missed-call texts.
Follow-up schedules	Automatic messages on or off, and the go-live preview.
Staff access / Roles	Staff logins, roles per studio, single permissions, View as.
Staff mailboxes	Each staff member's own mailbox.
Activity log	Who did what, and when.
AI helper	Ask Claude's monthly budget and usage.
Billing	Plan, trial end date, licence key, Export all my data (owner only).
Account → Sign-in security	Your password, second sign-in step, passkeys, remembered devices.

Lead rules (in Settings)

- **Red tag:** a returning person whose last enquiry is older than this many days starts again at Call 0 with a red tag.
- **Overdue:** leads below Call 10 with no call for this many days show as overdue on the dashboard.
- **Too old, not booked:** after Aged 120, leads move here after this many days since the last call.
- **Welcome delay:** 0 sends the welcome text and email the moment a lead arrives.

Invoice terms changes apply to new invoices only. Each invoice keeps the terms it was issued with.

8. Tips and tricks

- **Start in the Shadow log.** Leave sending off for a few days and read what would have gone. It's the safest way to go live.
- **Train in the demo studio.** New staff can click anything without risk.
- **Use View as** to check a new staff member sees the right things.
- **Add Face ID / Touch ID.** It's faster than typing codes, and safer.
- **Work the To book list** in the Diary first thing each morning.
- **Always write a call note.** The next person to call will thank you.
- **Tag your links.** Choose "Where it's going" before copying a booking link so Reports show what's working.
- **Search from anywhere.** Type a name, phone or email in the top bar.
- **Notes save as you type.** The box says "Saved".
- **Fix, don't fake.** Remove a task made by mistake with **Made by mistake? Remove it** rather than marking it done.
- **Ask Claude about the page you're on.** "This client" works, because it knows where you are.
- **Send email from your own domain.** Your emails are far less likely to land in junk.

9. Troubleshooting

Problem	Fix
The sign-up page says it's invite-only.	Enter the invite code you were given. No code? Email hello@pjfcsolutions.com .
The confirmation email didn't arrive.	Check junk. Ask for it again from the sign-up page. The link works for 3 days.
"That code didn't match" when setting up the authenticator app.	Check the time on your phone is set automatically, and type the newest code.
I don't have my phone for the second step.	On the sign-in page, choose another way, such as a code by email.
Nothing is being sent to clients.	Sending is probably off. Check the Shadow log. Also check Twilio and email are connected in Connections.
Texts don't send.	In Connections, check your Twilio Account SID, Auth token and number (+61...).
Emails go to junk.	Set up Send email from your own domain and click Check until all three records are found.
DNS records still show "not started".	DNS can take a few hours to update. Check the records were added exactly as shown, then click Check again.
A card payment didn't go through.	Check Stripe shows Connected in Connections. Try again, or send the client a payment link.
A payment plan isn't charging.	Look in the Waiting for card or bank tab. Add a card or send the client the secure link.
Online booking shows no times.	Check Shoot times & closures. Make sure Shoots is ticked and start times are entered, and the day isn't closed.
A package doesn't show online.	Tick Offer it in Packages, and check the online booking packages in Settings.
A staff member can't see a page.	Check their role in that studio in Staff access, and use View as to see what they see.
"Not found" after switching studio.	The record belongs to another studio. Switch back to that studio.
I can't add another studio or staff member.	You've reached your plan's limit. Change plan in Billing.

Problem	Fix
"That licence key was not found."	Copy the key again from your email or PJFC Solutions account. Check for spaces.
Staff can't sign in.	Your trial or subscription may have ended. Check Billing and enter or renew your licence.
I imported the wrong file.	Open the import under Earlier imports and click Undo.
A client asked us to stop texting.	A STOP reply does it automatically. Otherwise set Stop marketing under Flags on their client card.

10. FAQ

Do I need to install anything?

No. PJFC Photo runs in your web browser on a computer, tablet or phone.

Will clients get messages while I'm setting up?

No. Sending starts switched off. Imported clients are never sent anything. You switch sending on when you're ready.

Who pays for texts and card fees?

You do, directly to Twilio and Stripe. PJFC Photo doesn't add a margin, and payments go straight into your own Stripe account.

Can I use Facebook and Instagram lead forms?

One-click Meta connections for lead forms and messages are coming soon. For now, leads come from your website form, online booking pages and clients you add.

Does it connect to Google or WhatsApp?

One-click Google and WhatsApp connections are coming soon.

Are calls recorded?

No. Log each call by hand on the lead card.

Can staff only see their own studio?

Yes. Give them a role only in the studios they work in. Leave the others on "No access".

Can Claude send messages or change things on its own?

No. Claude never sends texts or emails. Anything it gets ready, such as a note or task, waits for you to click Confirm.

Does it work with PJFC Reveal?

Yes. Your product list is used by PJFC Reveal in the viewing room.

Are prices shown with GST?

Yes. All prices in PJFC Photo include GST, and invoices show the GST included.

Can I get all my data out?

Yes. The owner clicks **Export all my data** in Billing for a zip of CSV files covering every studio, plus uploaded documents. It works any time, and for 30 days after cancelling.

How do I cancel?

See [section 11](#).

11. Updates, backups and your data

Updates

PJFC Photo is hosted, so updates arrive automatically. There's nothing to download or install.

Where your data lives

- PJFC Photo is hosted in **Sydney, Australia**.
- Each studio has its **own private database**. Other businesses can never see your data.
- Connection keys are stored encrypted and never shown again.
- Sign-ins need a second step, and actions such as exports and View as are recorded in the activity log.

Backups

Every studio's database is backed up **every night**. Backups are kept for **14 days**, in Sydney.

Exporting your data

- **Clients**: click **Export CSV** on the Clients page (if your role allows).
- **Reports**: download any report as CSV or PDF.
- **Invoices**: print or save any invoice as a PDF.

Export all your data (owner only)

1. Open **Billing**.
2. In the **Your data** panel, click **Export all my data**.
3. A zip file downloads. It has one folder per studio, with one spreadsheet (CSV) per table: clients, enquiries, bookings, invoices, payments, payment plans, messages, notes and products. Uploaded documents are included too.

You can export at any time, and for 30 days after cancelling.



Dashboard
EVERY DAY
Leads
Leads to review
Messages 3
Mailbox
Tasks
Diary
Roster
Google reviews
Clients
SALES AND MONEY
Sales pipeline
Invoices
Payment plans
Gift vouchers
Discount codes
Booking links
Products

Harbour Light Portraits: Free trial plan, free trial until 22 Oct 2026.

Your plan
Studios: 1 of 1 · Staff logins: 1 of 3

PLAN	STUDIOS	STAFF LOGINS
Solo	1	3
Studio	3	10

Prices and plans are on pjfcsolutions.com/apps/photo. Texts (Twilio) and card fees (Stripe) are billed to your own accounts by those providers.

Choose a plan

Invoices and card (your PJFC Solutions account)

Licence key
After buying, your licence key is emailed to you and shown in your PJFC Solutions account. Enter it here.

Licence key

Add licence

Your data
Download everything your business has in PJFC Photo (every studio: clients, enquiries, bookings, invoices, payments, messages, notes, products and uploaded documents) as a zip of spreadsheet (CSV) files. You can do this at any time, and for 30 days after cancelling.

Export all my data

Ask Claude

Billing → Your data: download everything as a zip of CSV files.

If you cancel

- You can cancel at any time, from your PJFC Solutions account or by emailing us. You keep access to the end of the period you've paid for.
- After that, you have **30 days to export** your data with **Export all my data** in Billing.
- After 30 days, your data is **deleted**. Backups roll off within a further 14 days.

The [terms](#) and [privacy policy](#) have the full details.

12. Getting help

- **Ask Claude:** the button at the bottom right of every page answers most how-to questions straight away.
- **Report a problem:** the link at the bottom of every page sends a note to the PJFC Photo team, with the page you were on.
- **Email us:** hello@pjfcsolutions.com. Tell us your business name and what you were doing. Please don't send passwords or keys.

PJFC Photo is made in Australia by PJFC Solutions.