MY PSICO AGENDA

Center Manager Guide

Complete handbook for psychology centers

The calendar and clinical-management software for psychologists, therapists and psychology practices.

🌐 mypsicoagenda.com

User guide · English · June 2026

Welcome to **My Psico Agenda**, the all-in-one management platform for your psychology center. As a center manager, you have a dedicated dashboard from which you coordinate your therapists, rooms, the shared calendar, billing and the statistics of the whole clinic. This guide walks you through every feature step by step so you master it from day one.

Contents

1 Center plans and pricing

The **center** plans include an account for each therapist, the center dashboard, rooms and centralised invoicing. **No lock-in**: scale up or cancel anytime.

🏢 Center Mini

124,99 € / month

For practices with up to 5 therapists.

- ✓ **Patient portal**
- ✓ Up to 5 therapists
- ✓ «Júnior» calendar for each therapist
- ✓ Center dashboard with KPIs and rankings
- ✓ Centralised rooms and schedule management
- ✓ Center invoicing with separate series
- ✓ 450 Verifactu invoices / month (center)
- ✓ 50 Verifactu invoices / therapist / month
- ✓ 50 automatic WhatsApp reminders / therapist / month

MOST POPULAR

🚀 Center Super

199,99 € / month

For growing practices with up to 15 therapists.

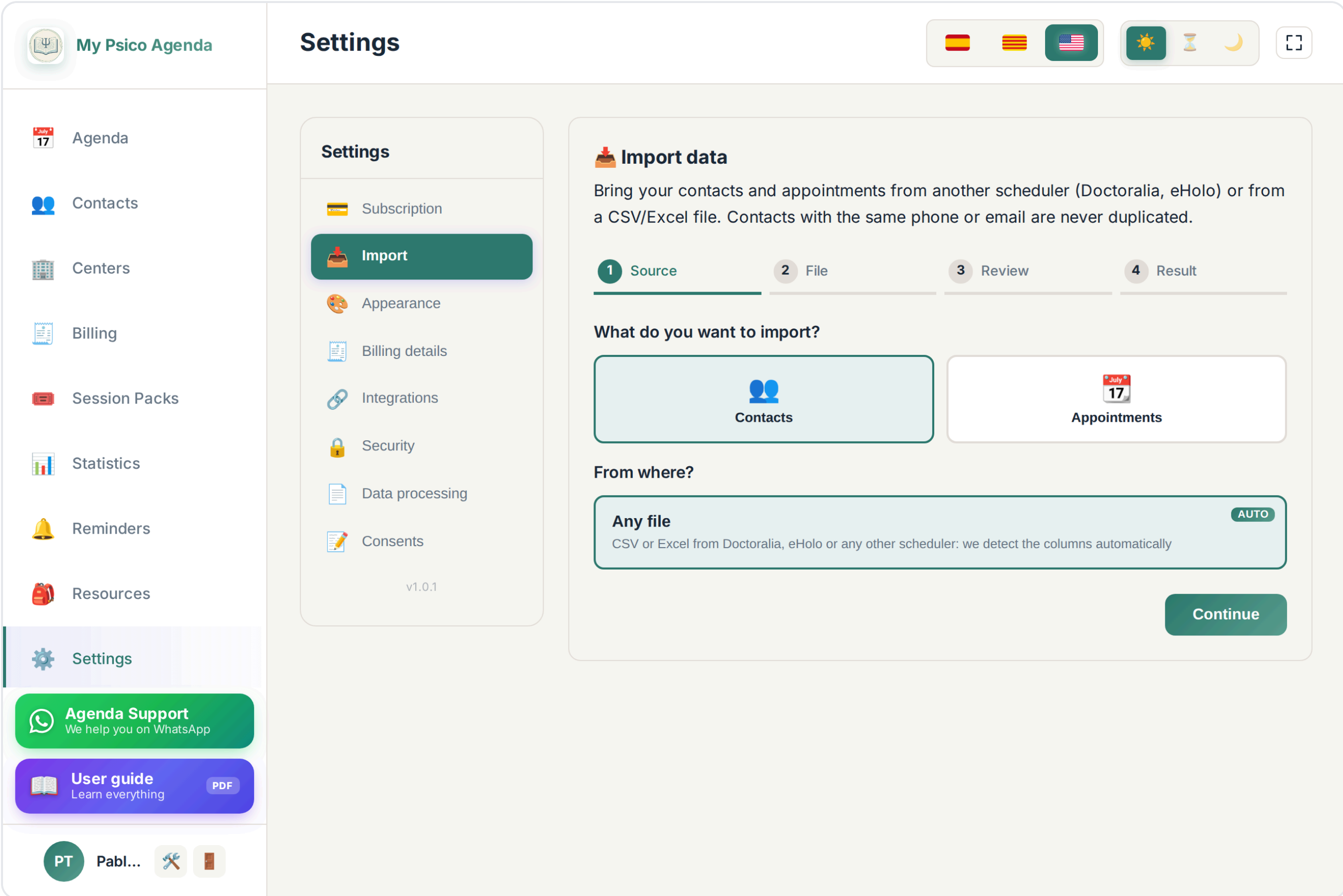
- ✓ **Patient portal**
- ✓ Up to 15 therapists
- ✓ «Sénior» calendar for each therapist
- ✓ ASD / ADHD resources included
- ✓ Per-therapist statistics and PDF reports
- ✓ Priority support and onboarding
- ✓ 1000 Verifactu invoices / month (center)
- ✓ 200 Verifactu invoices / therapist / month
- ✓ 200 automatic WhatsApp reminders / therapist / month

No lock-in · VAT not included · mypsicoagenda.com

💡 **Tip:** Each therapist in the center gets a **Júnior** or **Sénior**-style view depending on the plan. Manage your subscription from **Settings · Subscription**.

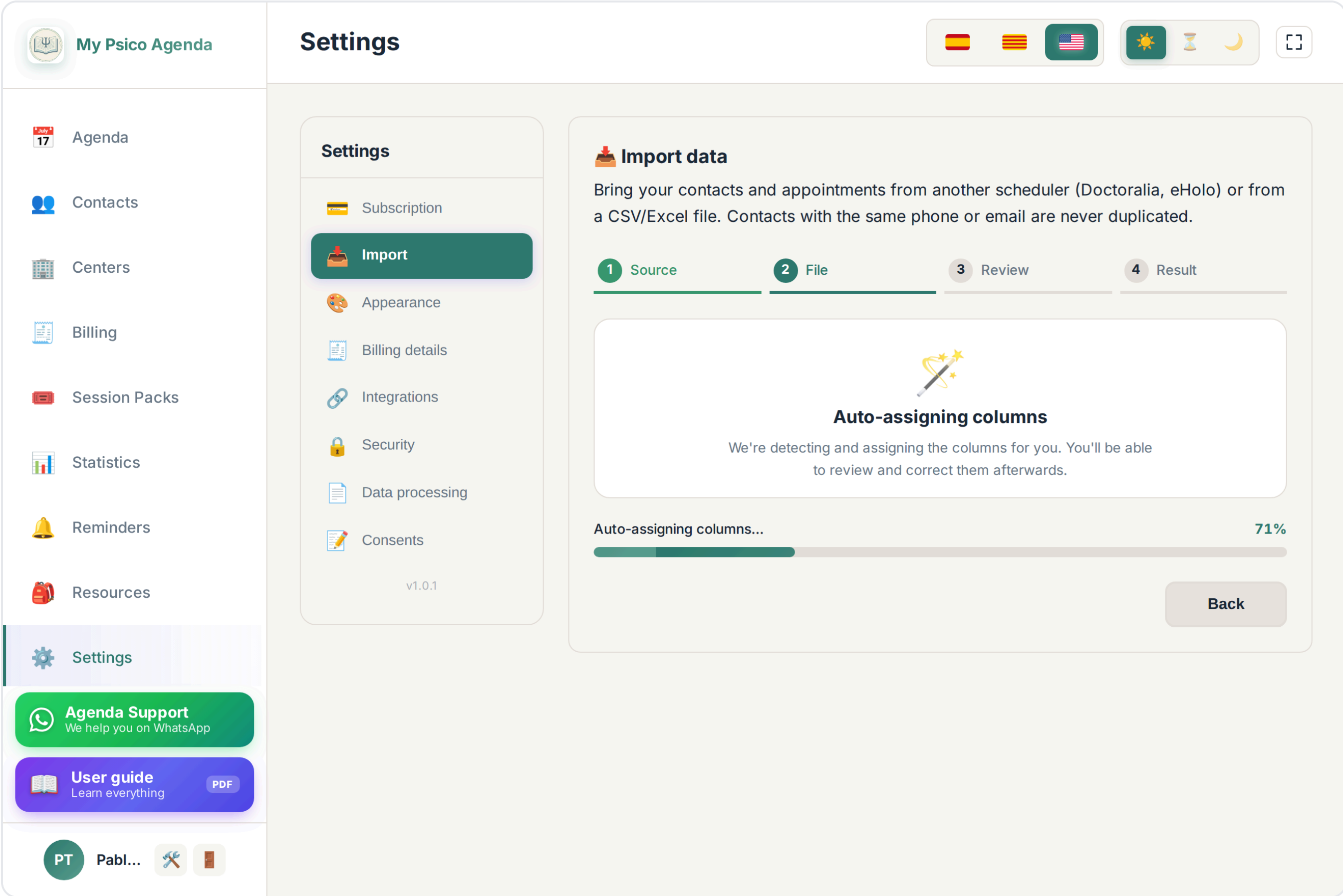
2 Import contacts and appointments

Each therapist can bring their patients and appointments from another scheduler (such as **Doctoralia** or **eHolo**) or from a CSV/Excel file, from **Settings › Import** in their own calendar. This makes the practice's initial setup immediate, with no manual typing.

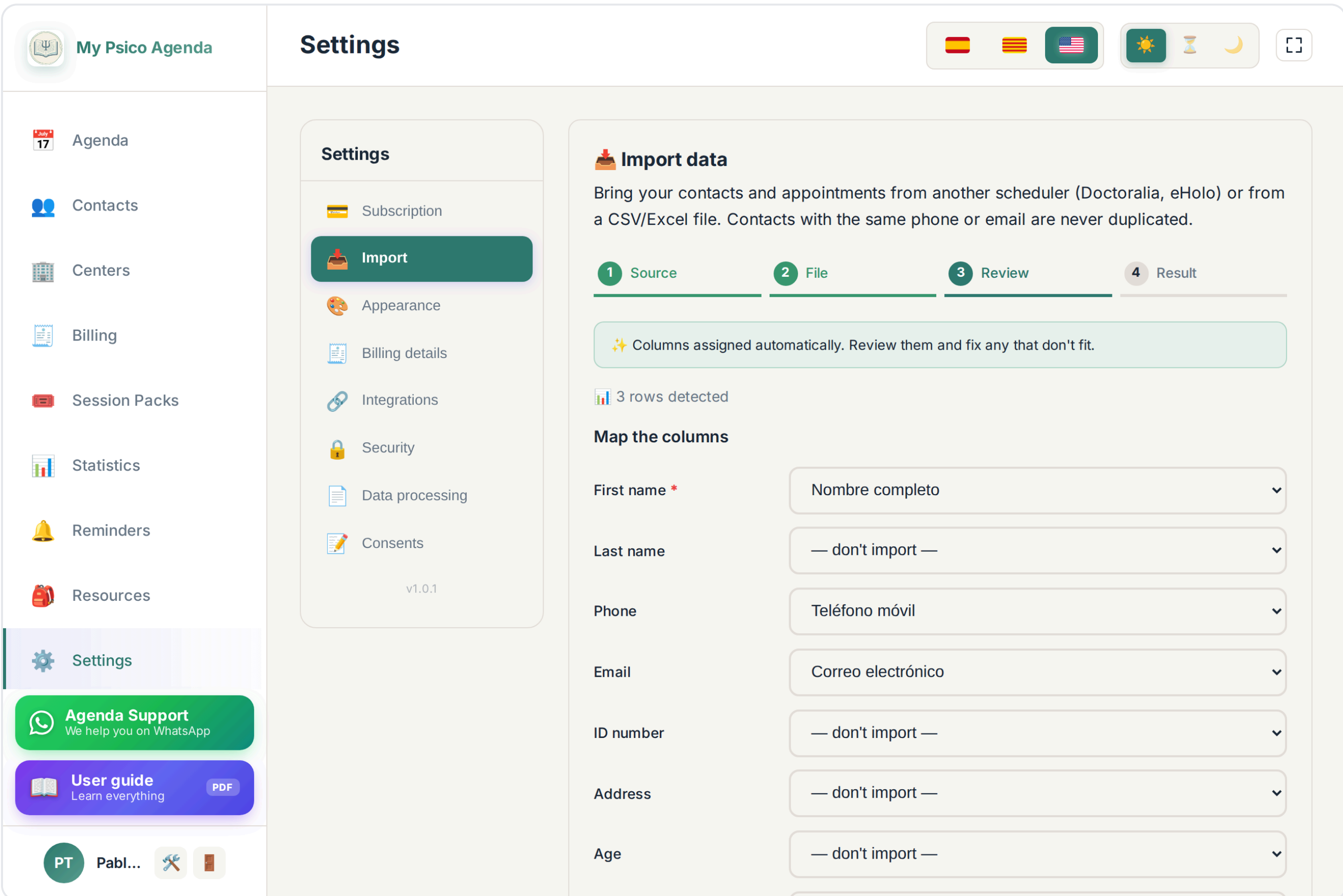


Choose whether to import contacts or appointments. The wizard detects the columns automatically, whatever the source scheduler.

Upload your **CSV or Excel** file (up to 200 MB). The wizard reads the columns and assigns each one to the right field (name, phone, email, date...). If there is no clear match, it leaves the field unassigned.

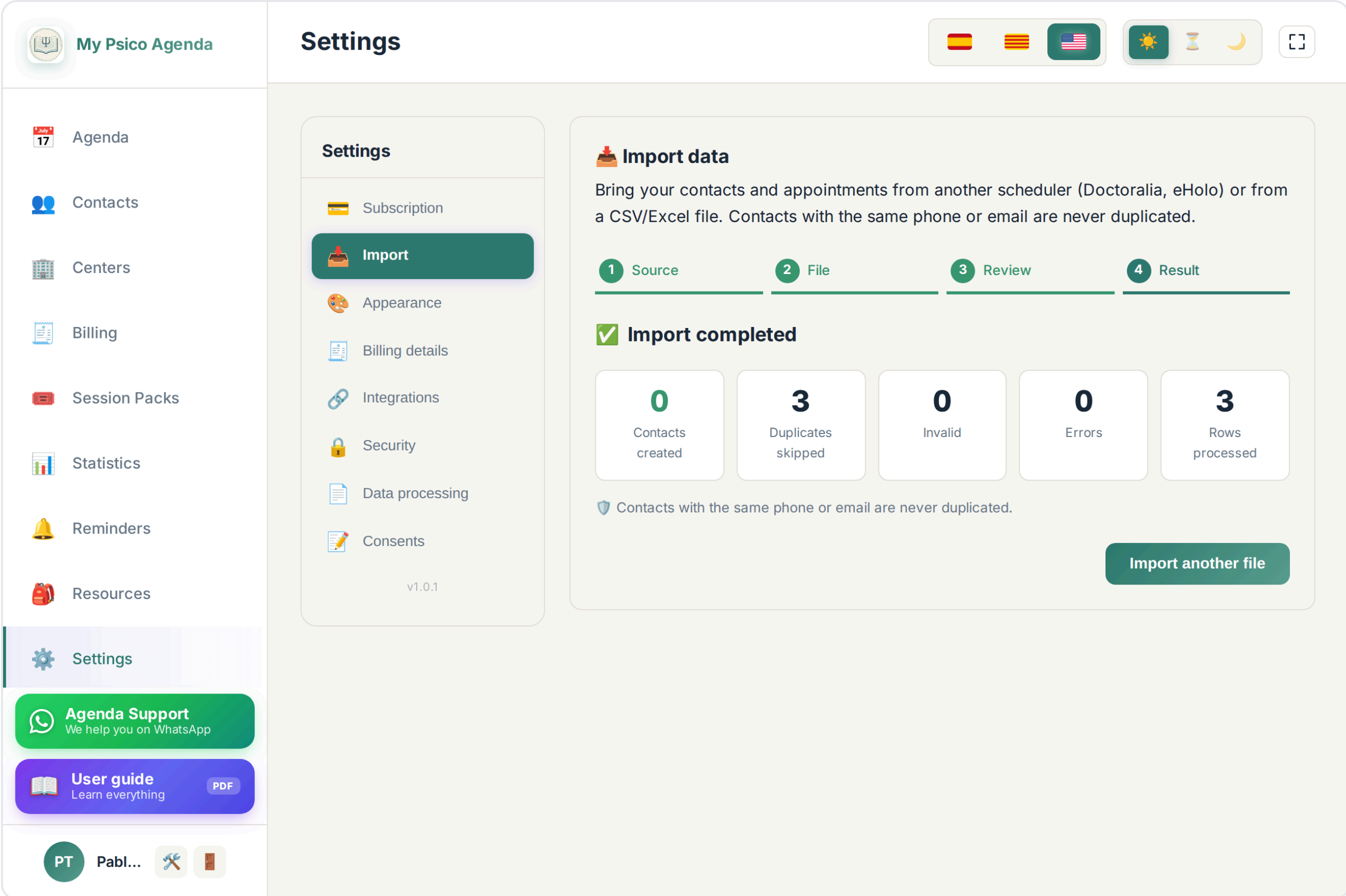


Auto-assignment: the columns are detected and assigned automatically for you.



Review the assignment and fix anything before importing. Whatever does not fit stays unassigned.

1. Go to **Settings › Import**.
2. Choose what to import: **contacts** or **appointments**.
3. Upload the CSV or Excel file (up to 200 MB).
4. Review the automatic column assignment and adjust it if needed.
5. Click **Import** and review the final summary.

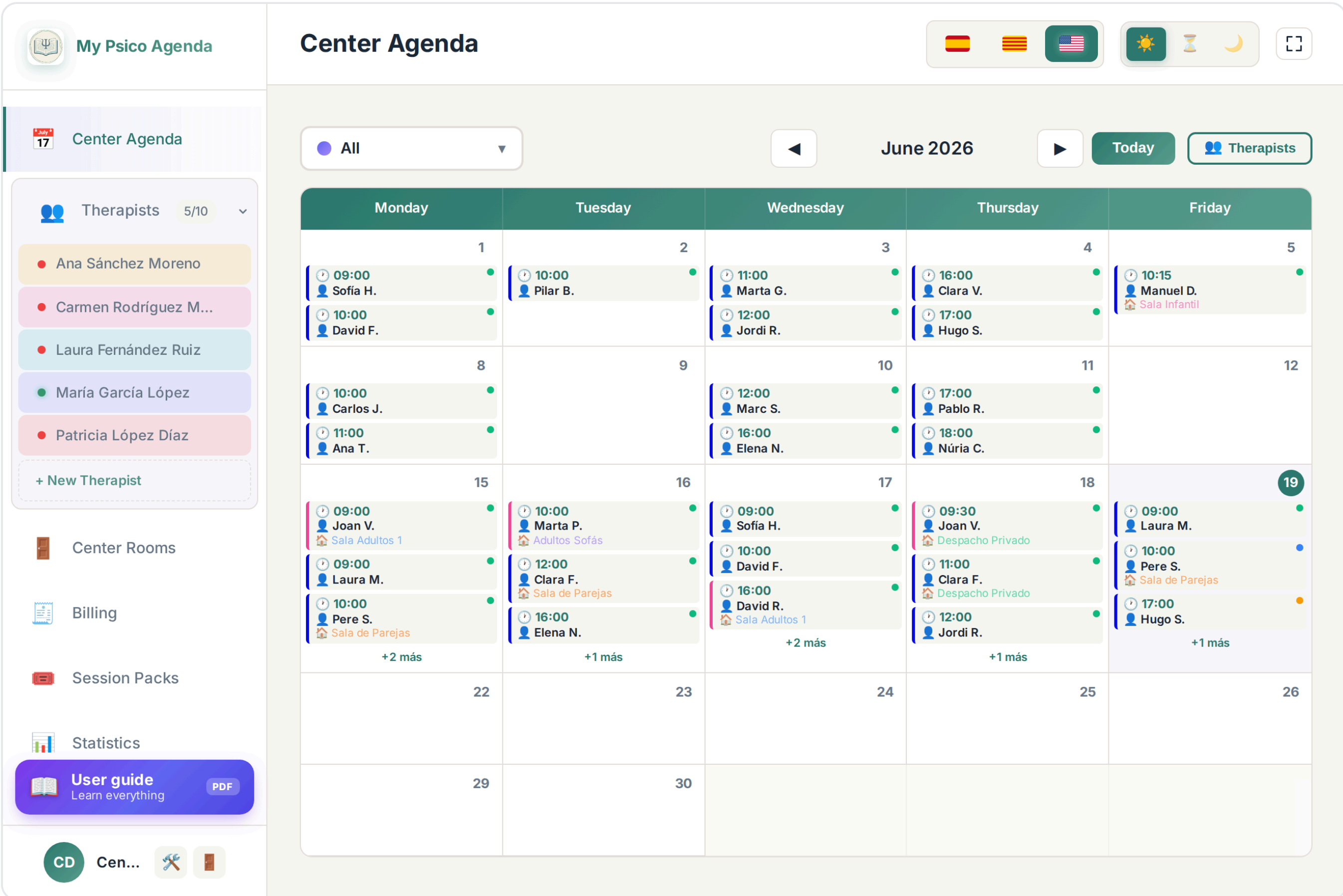


When finished you will see how many contacts and appointments were created, the duplicates skipped and any issues.

💡 **Tip:** When importing **appointments**, if the patient does not exist yet it is created automatically and linked to the appointment, without duplicating. Contacts with the same phone or email are **never** repeated, dates adapt to any format, and the file is deleted from the server when finished.

3 Welcome and manager dashboard

When you log in with your **center** account, you reach a dashboard designed to coordinate the entire clinic. Unlike a therapist account, you have no personal calendar or standalone contact list: patients belong to each therapist. From the **side menu** you have direct access to every area of the center.



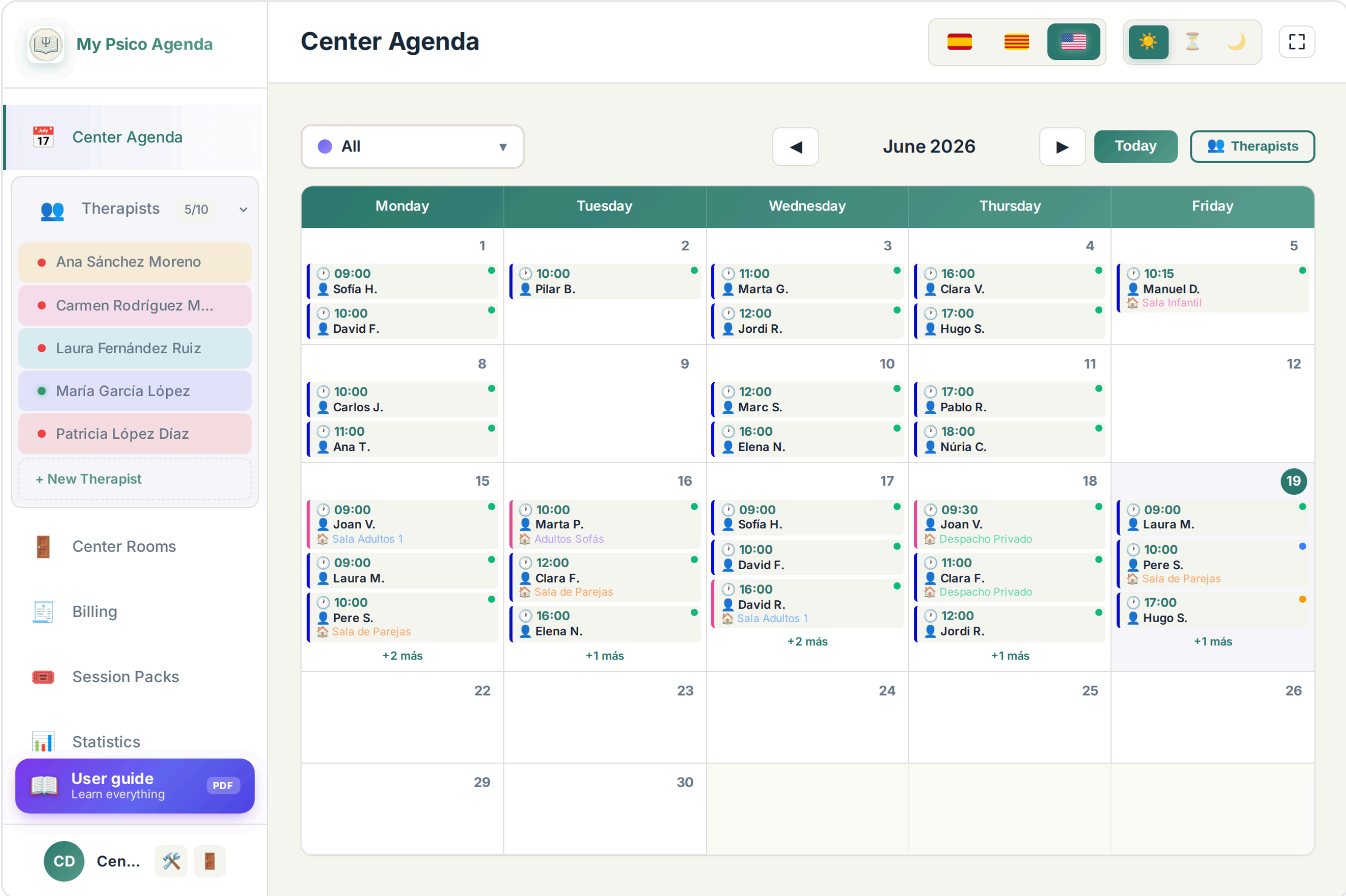
Manager dashboard with the side menu and access to every section of the center.

1. Log in with the email and password of the center account.
2. Find the **side menu**: Center Calendar, Therapists, Center Rooms, Billing, Bonds, Statistics, Reminders and Settings.
3. Expand **Therapists** to see the full list with the counter of active professionals.
4. Click the **user block** (bottom of the menu) to edit the center's name and logo.
5. Tap the **center name and logo** at the bottom left to edit the center profile.

> 💡 **Tip:** Set your **center logo** right away: it appears on the dashboard and on documents, reinforcing your clinic's image.

4 Center calendar by rooms

The **Center Calendar** is the global view of the clinic's occupancy. It organizes appointments by **rooms**, with a tab for each room and an **All** option to view them together. This way you can spot at a glance which rooms are free and which are busy in each time slot.



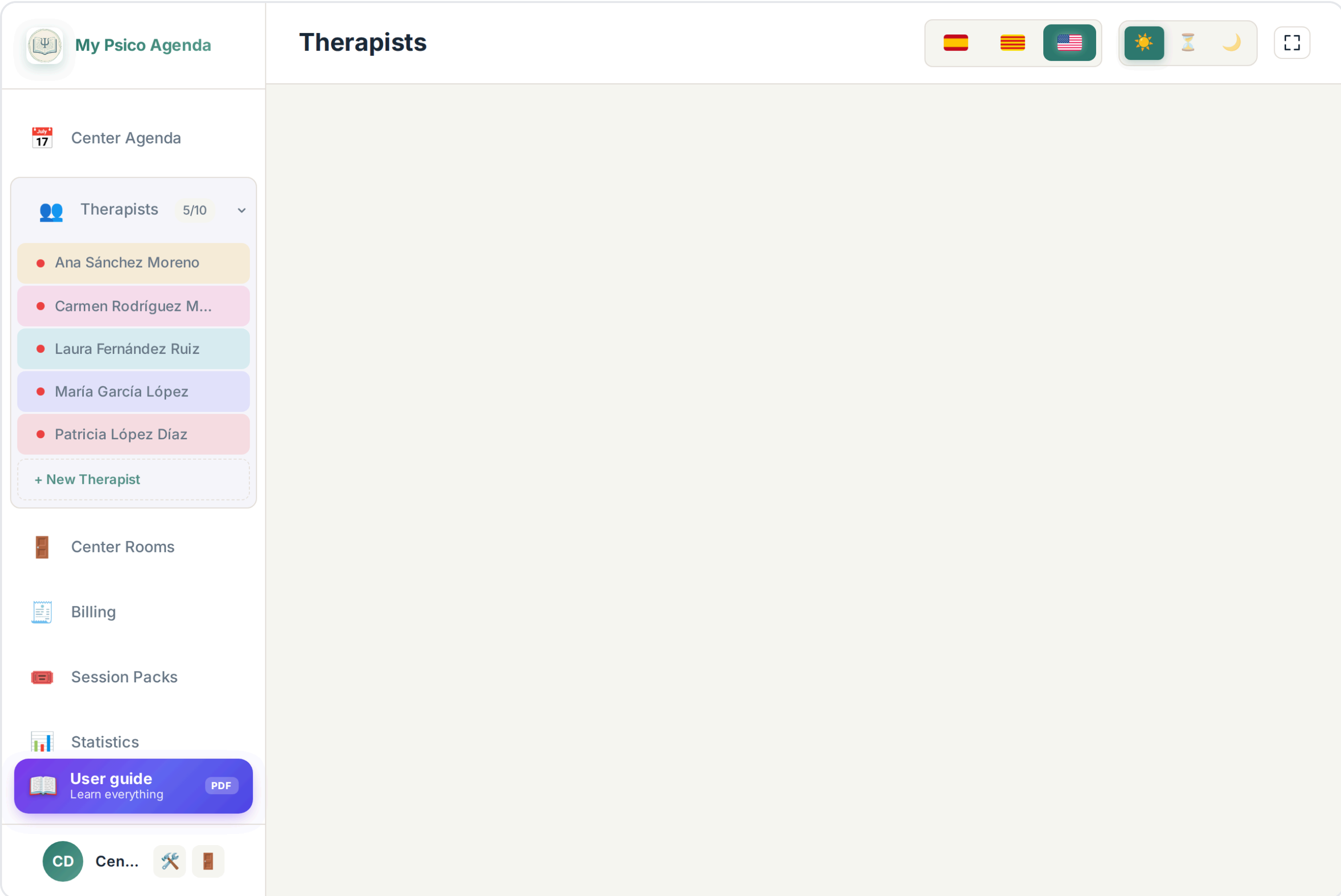
Center Calendar with per-room tabs and visual occupancy by hour.

1. Select the **room tab** you want to check, or press **All** to see the combined occupancy.
2. Use the **week** / **month** navigation and the **Today** button to move through dates.
3. To create an appointment, click the free time slot and choose the **therapist** and the **room**.
4. Fill in the patient details and duration, and save the appointment.

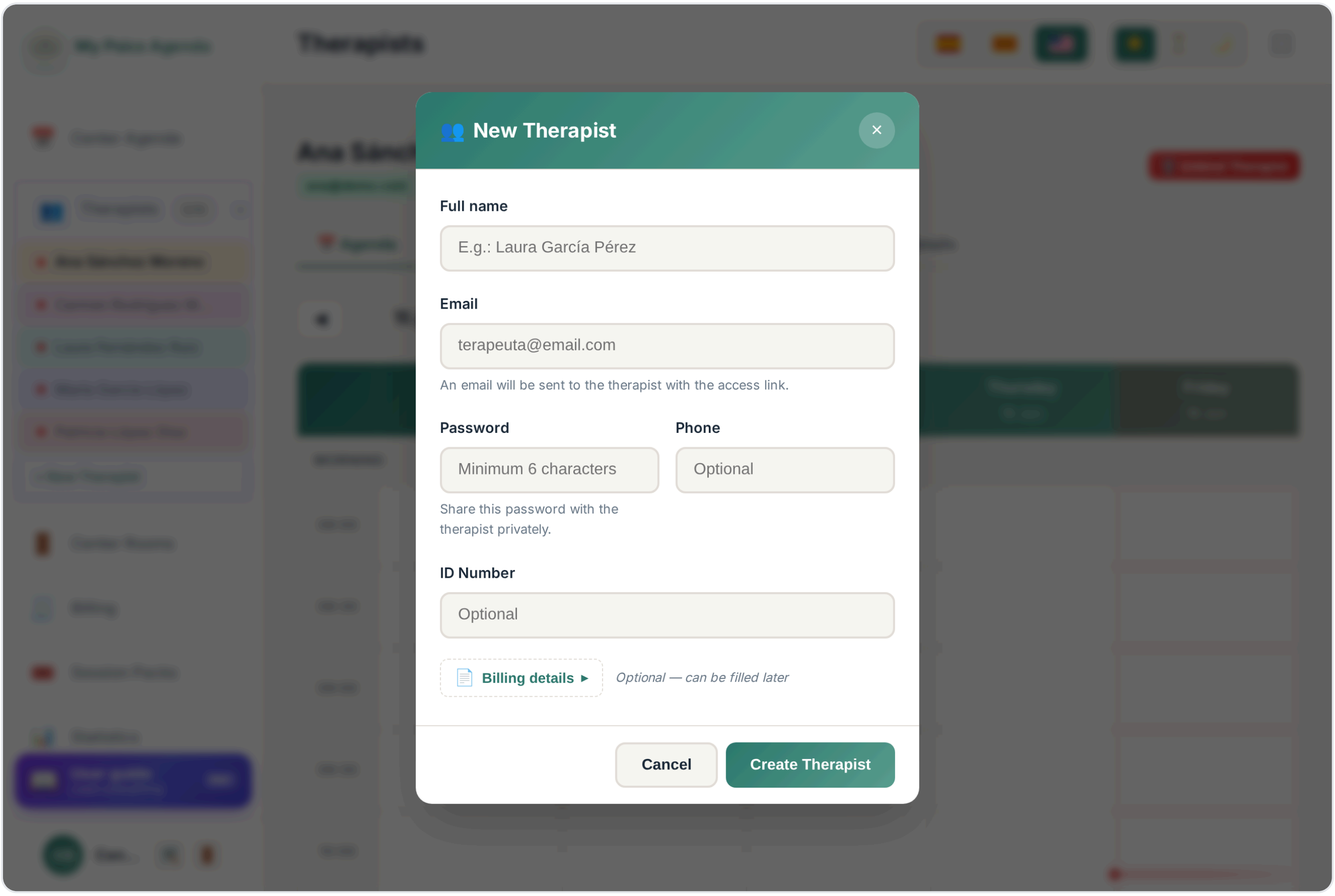
> 💡 **Tip:** The **All** view is ideal for balancing the load: if one room is overbooked, reassign the appointment to another free room in the same slot.

5 Managing therapists: onboarding

From the **Therapists** section you see the list of all the center's professionals and add new ones. Each therapist you add gets their own access to the platform. The number of therapists you can register depends on your **subscription plan**.



Therapists section with the list of the center's professionals.



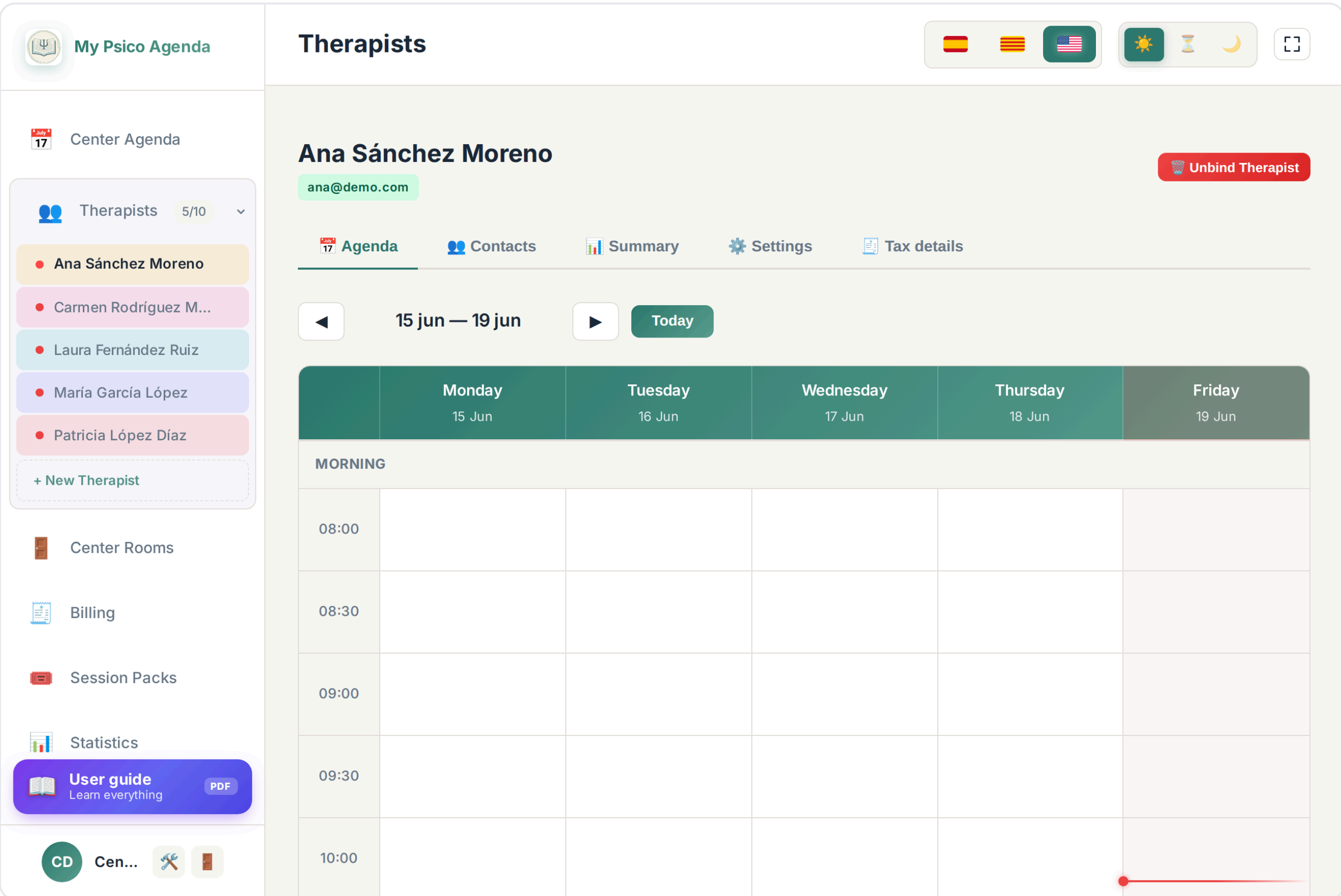
Therapist onboarding form with their access and billing details.

1. In **Therapists**, press the button to **add therapist**.
2. Enter the **name**, the **email** (which they will use to gain access) and a **password**, which stays visible so you can share it with the professional.
3. Optionally add the **phone**, the **ID number** and the **billing details**.
4. Save: the therapist will appear in the list and the counter will update.

> 💡 **Tip:** Share each therapist's **email and password** through a secure channel and advise them to change it on first login from their security settings.

6 Therapist profile: calendar, contacts and settings

When you open a therapist you reach their **full profile**, organized in five tabs: 📅 **Calendar** (view and create their appointments), 👥 **Contacts** (their patients), 📊 **Summary** (statistics), ⚙️ **Settings** (color and commission) and 🧾 **Tax details**. From here you supervise and manage everything related to that professional.



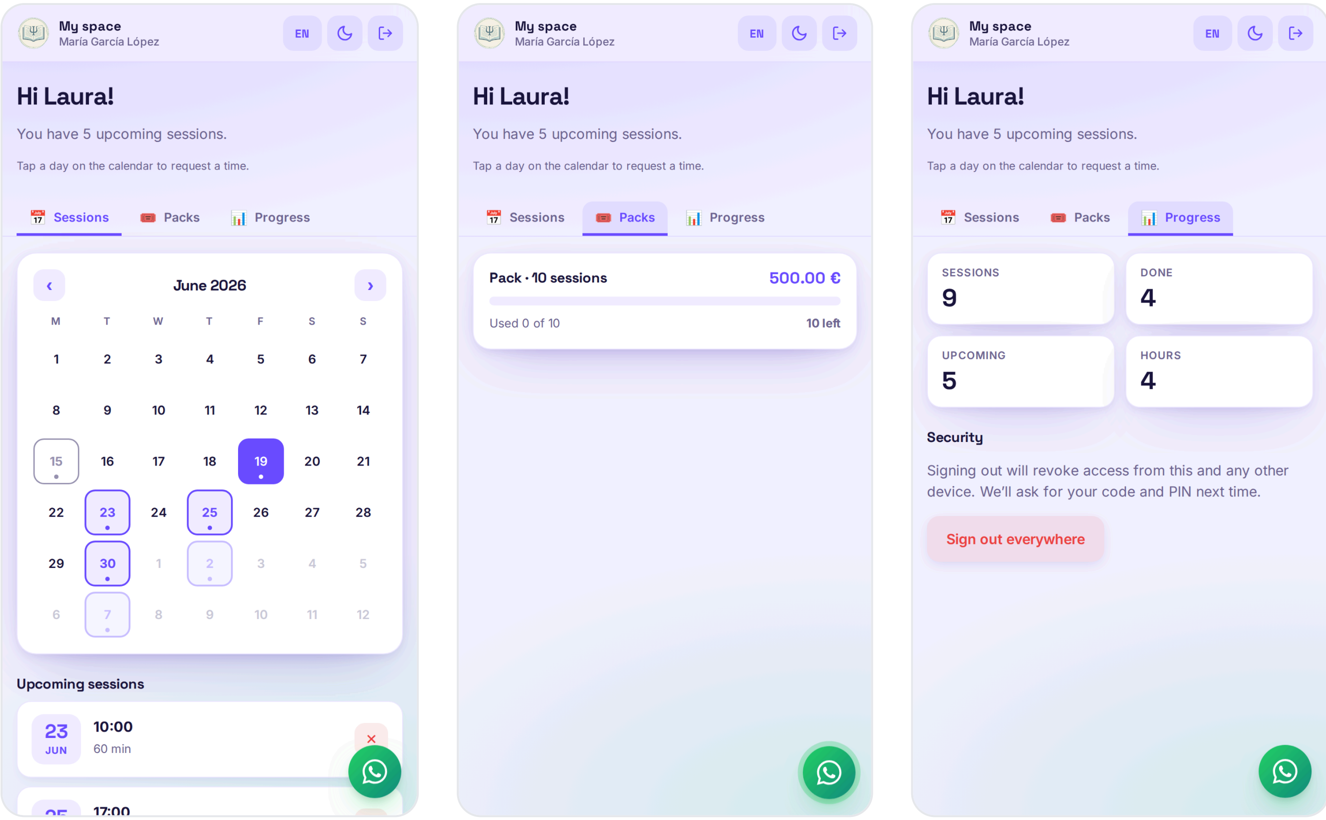
Therapist profile with its five management tabs.

1. In 📅 **Calendar**, view and create appointments on behalf of the therapist.
2. In 👥 **Contacts**, add patients and, if needed, **transfer a patient** to another therapist.
3. In 📊 **Summary**, review the professional's individual statistics.
4. In ⚙️ **Settings**, assign the therapist's **color** and configure their **commission**: no commission, percentage or fixed amount.
5. In 🧾 **Tax details**, complete the therapist's billing data. To remove them, use **Unlink** (it does not delete their account).

> 💡 **Tip:** Assign a **different color to each therapist**: it makes it easy to tell whose appointment is whose in the Center Calendar and the per-room views.

7 Patient portal

Every patient in the center —of any therapist— can have their own **online space**. They enter with a **personal code** and a **PIN** to see their sessions, their progress and **book appointments**.



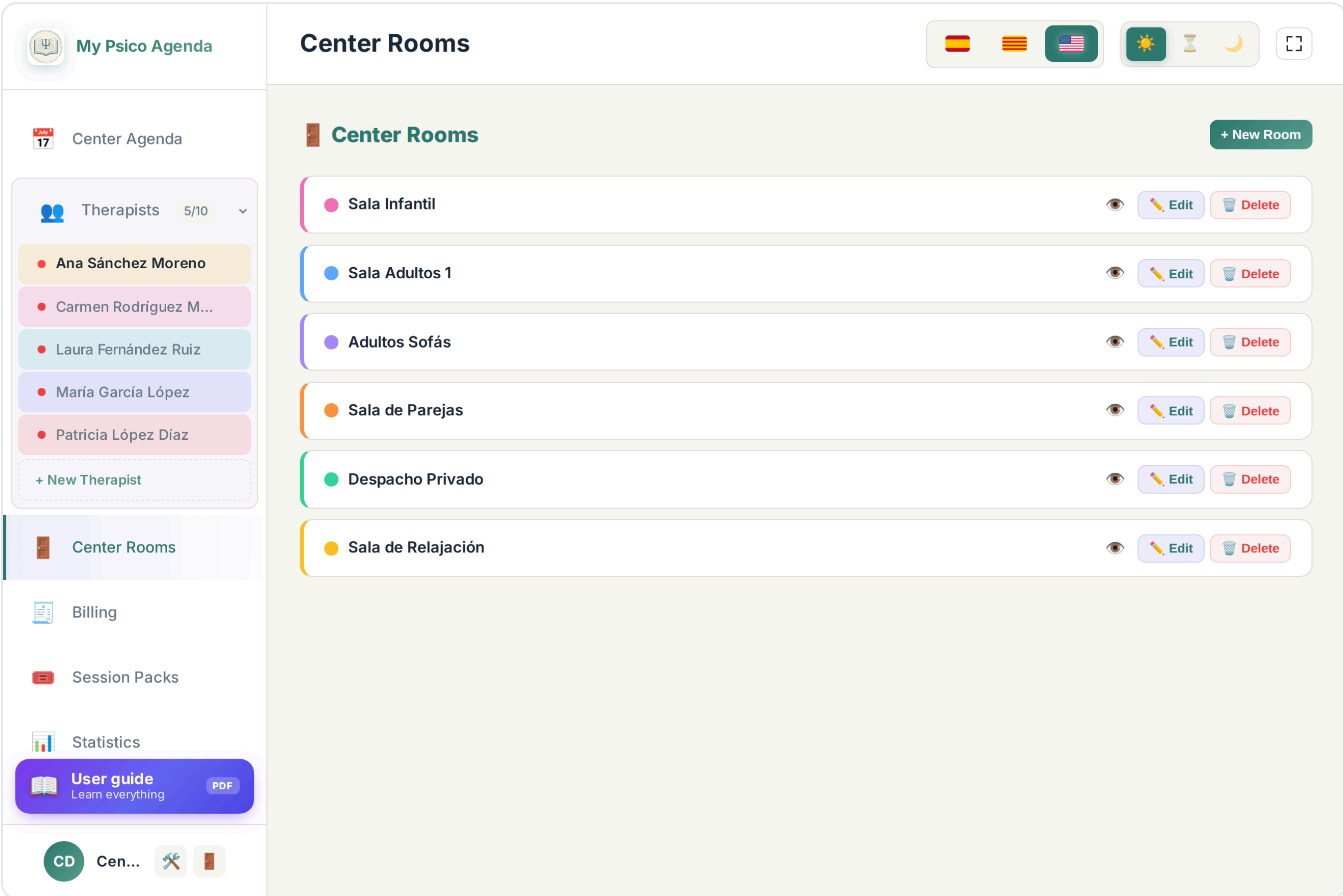
The patient's space on their phone: upcoming sessions, packs and progress.

1. Each therapist sends the code to their patient via **WhatsApp** from the patient card (therapist's Contacts tab).
2. The patient creates their **PIN** and accesses their space.
3. They see their **upcoming sessions**, **packs** and **progress**.
4. They can **request an appointment**; the request reaches the relevant therapist's calendar for confirmation.

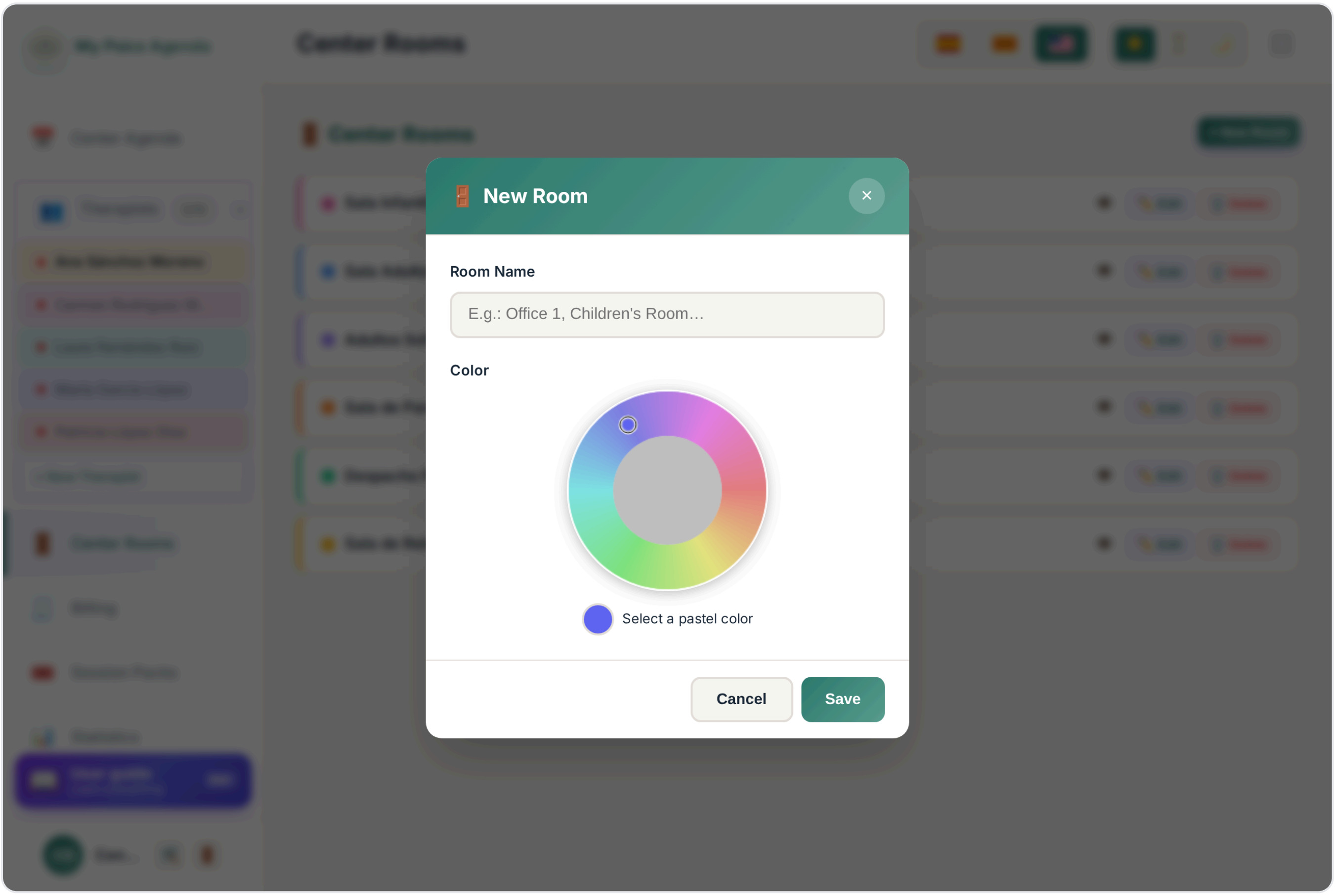
> 💡 **Tip:** The **patient portal** is included in every plan, including the center plans.

8 Center rooms

Rooms represent the physical consulting rooms of your clinic. Defining them lets you assign a room to each appointment and organize the **Center Calendar by rooms**. Each room has a name and a color for quick identification.



Center Rooms with the list of available consulting rooms.



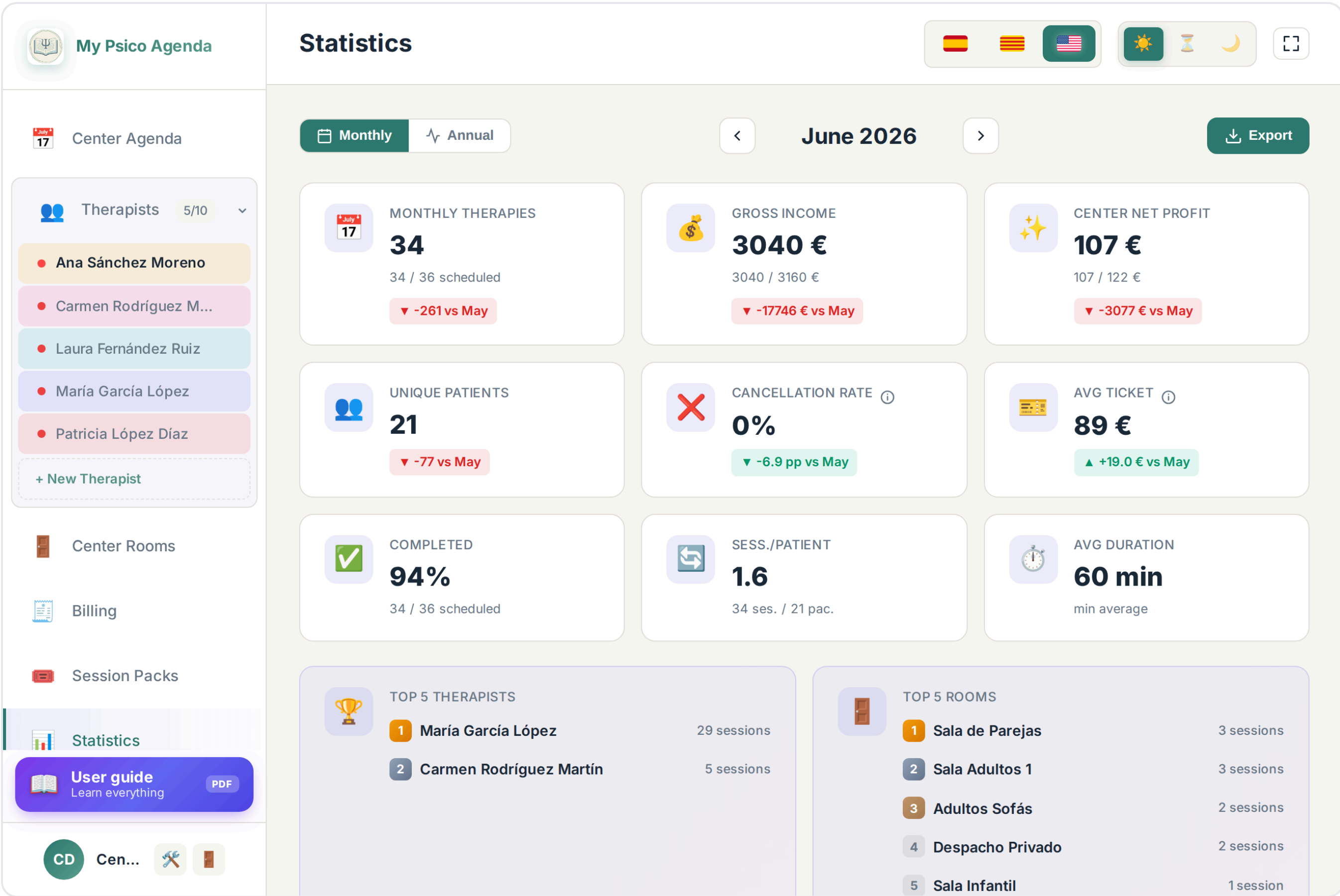
Form to create a new room with a name and color.

1. Open **Center Rooms** from the side menu.
2. Press to **create a new room**.
3. Type the room's **name** and pick a distinctive **color**.
4. Save: the room becomes available to assign in appointments and appears as a tab in the Center Calendar.

> 💡 **Tip:** Give each room a clear name (for example *Room 1*, *Children's room*) so therapists and reception instantly know which space each appointment refers to.

9 Center statistics

The **Statistics** section gathers the key indicators of the whole clinic. It includes the same **KPIs** a therapist sees —therapies, gross and net income, unique patients, cancellation rate, average ticket, completed sessions, sessions per patient and average duration— and adds the **Top 5 Therapists** and **Top 5 Rooms** rankings.



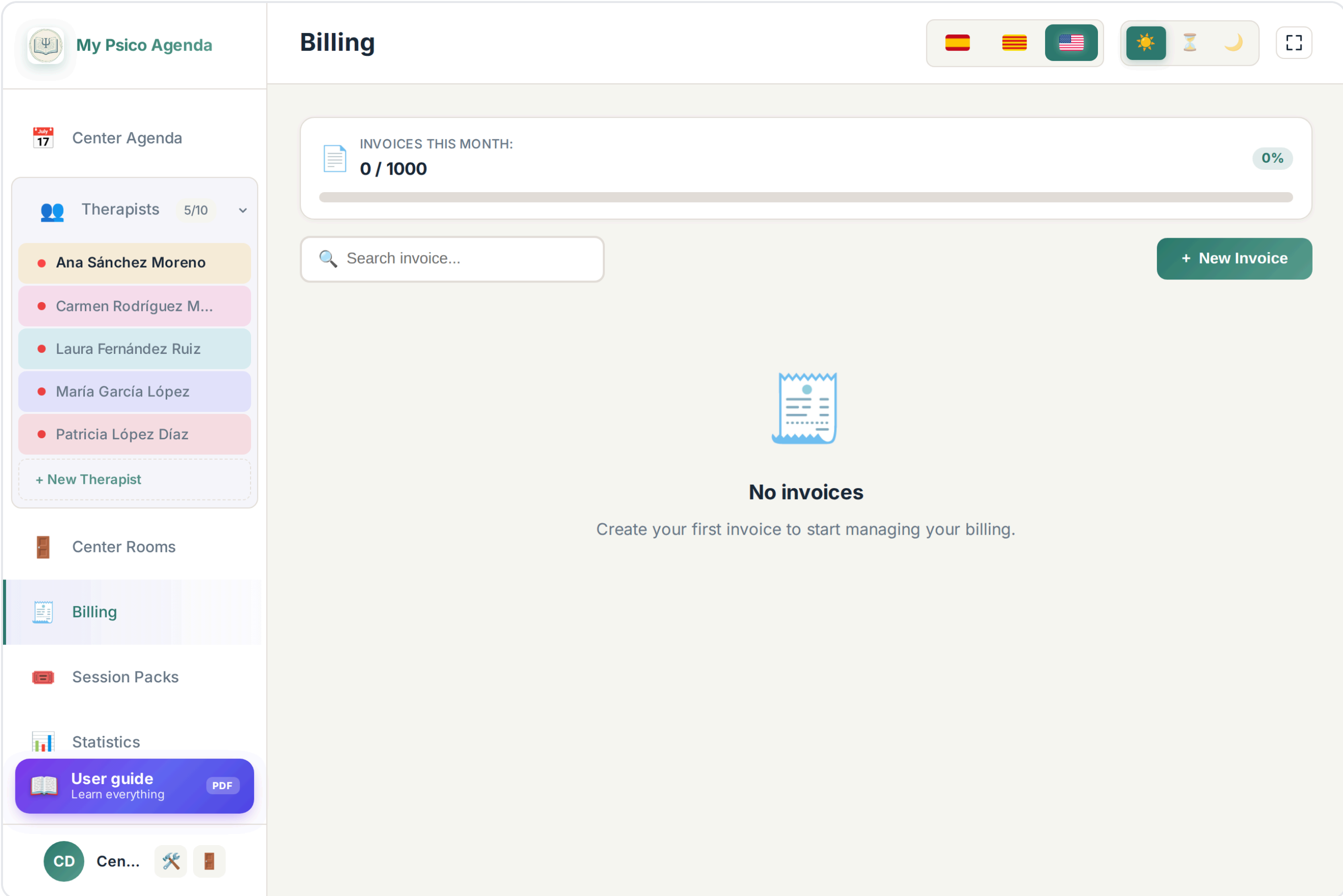
Center statistics with KPIs and the Top therapists and Top rooms rankings.

1. Open **Statistics** from the side menu.
2. Choose the period in the toolbar: **Monthly** or **Annual**.
3. Review the overall **KPIs** and check the **Top 5 Therapists** and **Top 5 Rooms** rankings.
4. Use the **export** option to download the period's data.

> 💡 **Tip:** Compare **monthly and annual** performance to spot seasonality: it will help you plan room occupancy and the onboarding of new therapists.

10 Center billing

In **Billing** you manage the invoices of the whole clinic. It works just like a therapist account, but with a **therapist selector** where applicable, so you can issue and review invoices linked to each professional in the center.



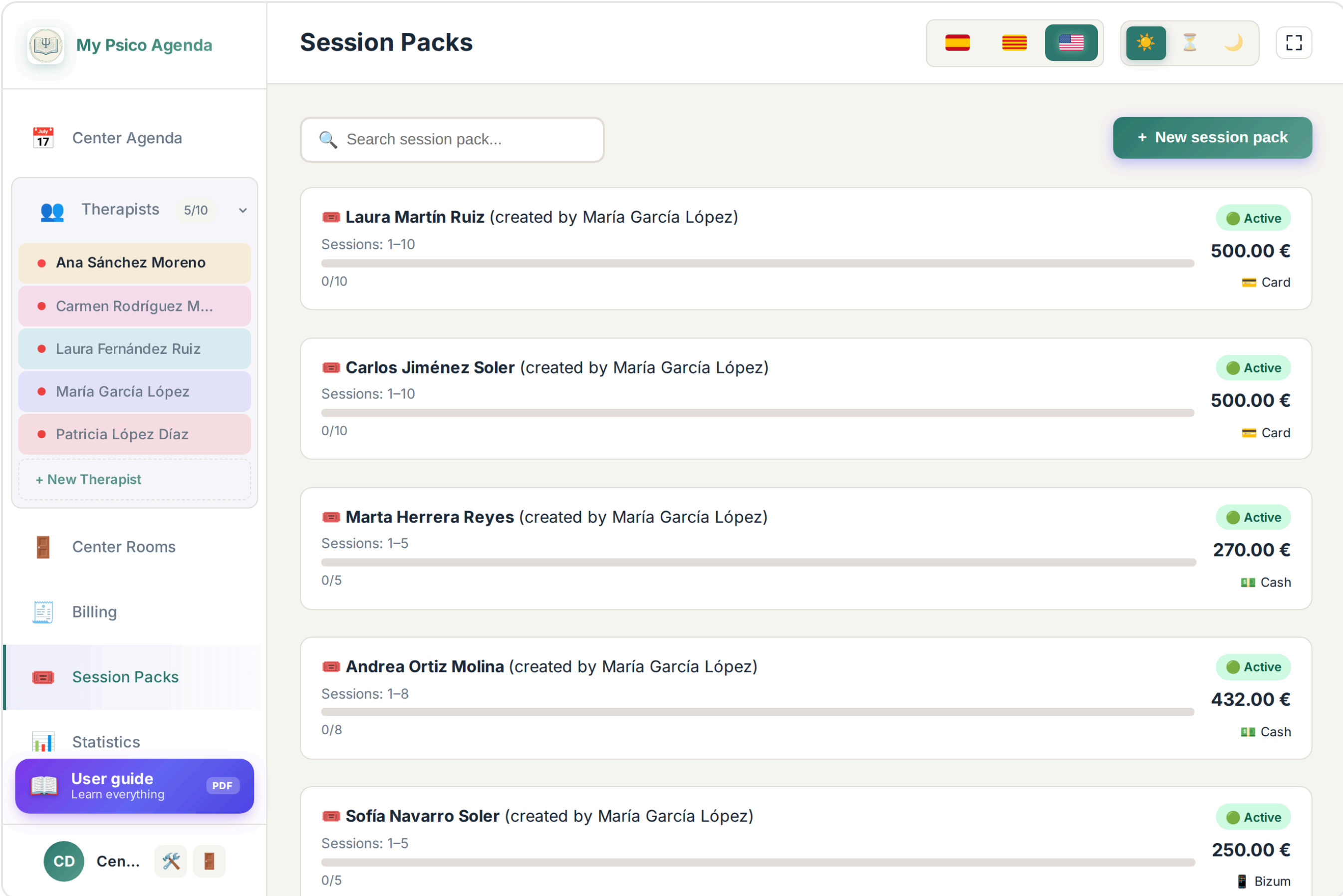
Center billing with the therapist selector.

1. Open **Billing** from the side menu.
2. Use the **therapist selector** to filter or issue invoices for the relevant professional.
3. Create, review and download invoices as needed.
4. Make sure the **center's tax details** are complete (chapter 10) so the invoices are valid.

> 💡 **Tip:** Combine **billing** with each therapist's **commission** setup (chapter 4) to get a clear picture of the center's net income.

11 Bonds

The **Bonds** section lets you manage prepaid session packages. As in billing, you have a **therapist selector** to link each bond to the professional who will deliver the sessions. It is ideal for offering package rates and building patient loyalty.



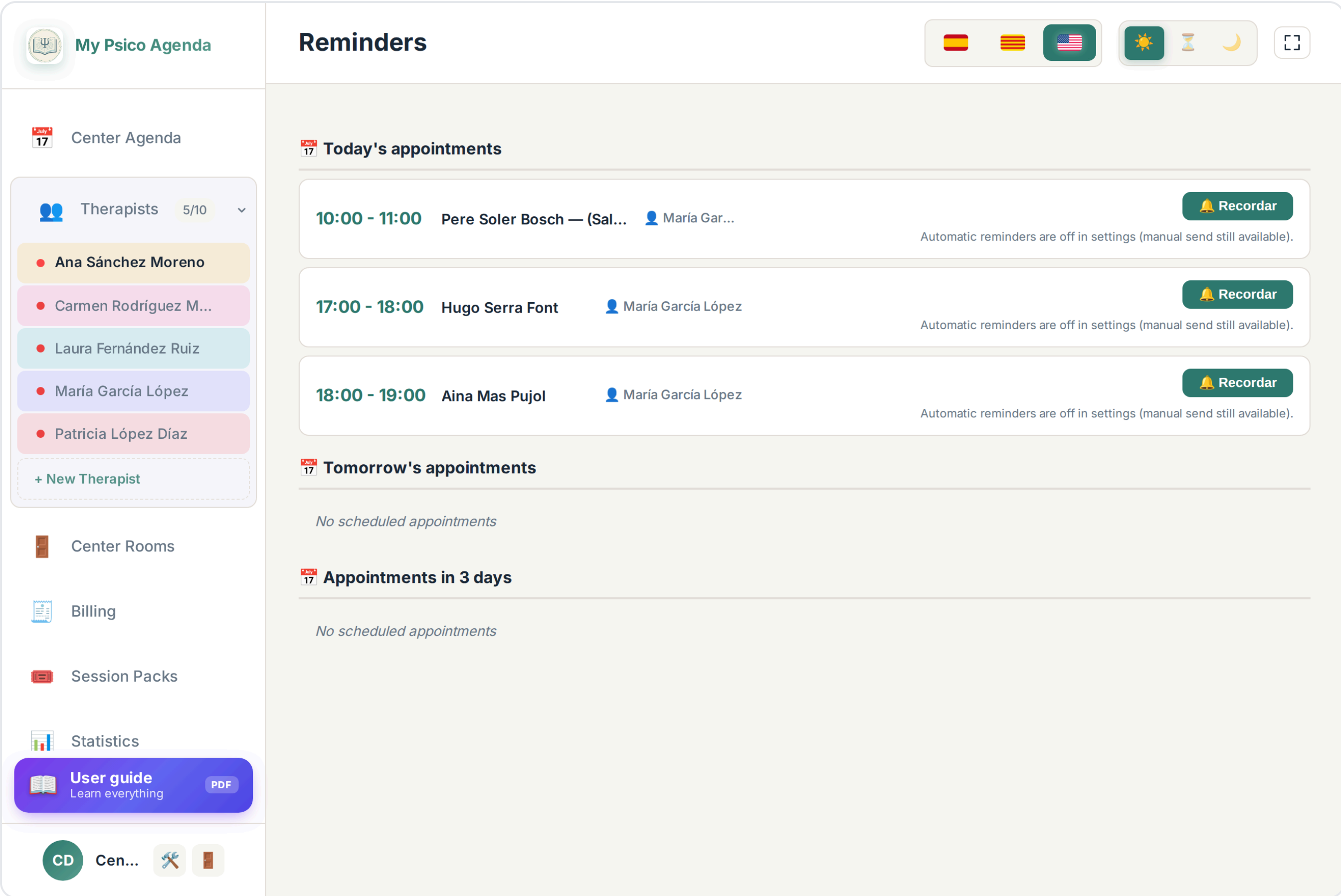
Bonds section with the management of session packages.

1. Open **Bonds** from the side menu.
2. Select the **therapist** the bond will be linked to.
3. Create the bond specifying the number of sessions and its amount.
4. Track each bond's **usage** as the patient completes the sessions.

> 💡 **Tip:** Periodically check **nearly depleted** bonds to notify the patient and offer a renewal before they run out of sessions.

12 Reminders

Reminders help reduce no-shows by notifying patients of their upcoming appointments. From this section you configure how and when notices are sent to the clinic's patients.



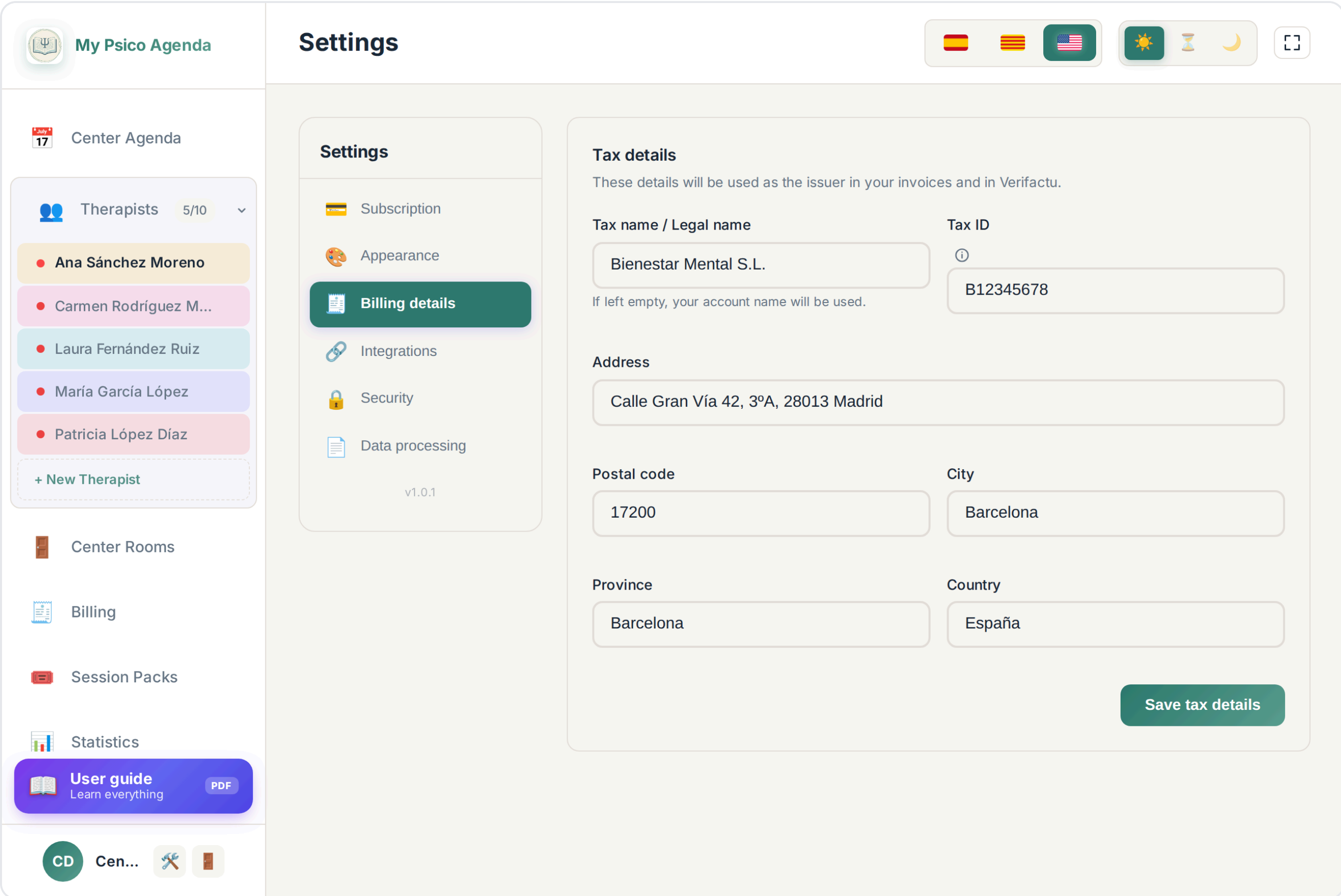
Reminders section for appointment notices.

1. Open **Reminders** from the side menu.
2. Set the **lead time** with which you want the notices sent.
3. Review or adjust the **content** of the reminder message.
4. Save the settings so the reminders apply to upcoming appointments.

> 💡 **Tip:** A reminder **24 hours in advance** is usually the ideal balance: it leaves room to reorganize the schedule if the patient cannot attend.

13 Center tax details

In **Settings · Billing details** you define the center's tax data as the **invoice issuer**. This data feeds the billing system and the **Verifactu** integration, so it is essential that it is accurate and complete.



Settings · Center billing details (invoice issuer).

1. Go to **Settings** and open **Billing details**.
2. Fill in the center's **legal name**, **tax ID** and **tax address**.
3. Check the **Verifactu**-related setup for issuing invoices.
4. Save the changes before issuing new invoices.

💡 **Tip:** Review this data whenever any of the center's tax information changes: an invoice issued with wrong data may force you to correct it.

14 Google Calendar & Contacts sync

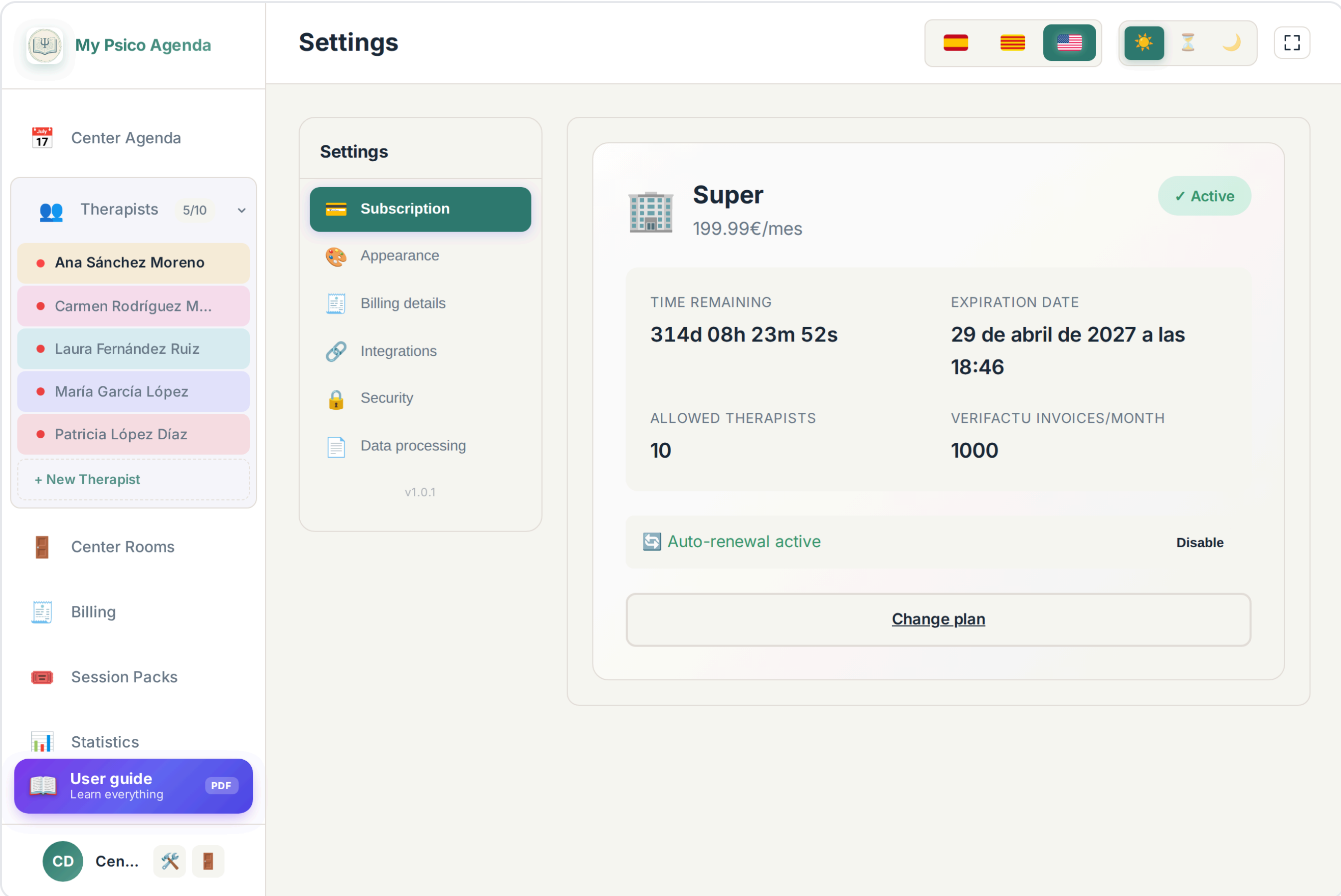
Google sync is **per therapist**. As a center you have no calendar or contacts of your own — every patient and appointment belongs to a therapist— so **the Google connection is not made from the center account**. Each therapist links their own Google account from **their own Settings · Integrations**: their appointments appear in **their** Google Calendar and they can import contacts from **Google Contacts**.

1. Each therapist opens **their** Settings · Integrations and taps **Connect with Google**.
2. They authorise access to **Calendar** and **Contacts** in their own account.
3. Their appointments are pushed to **their** Google Calendar and, if they edit or delete an appointment, their calendar updates automatically.

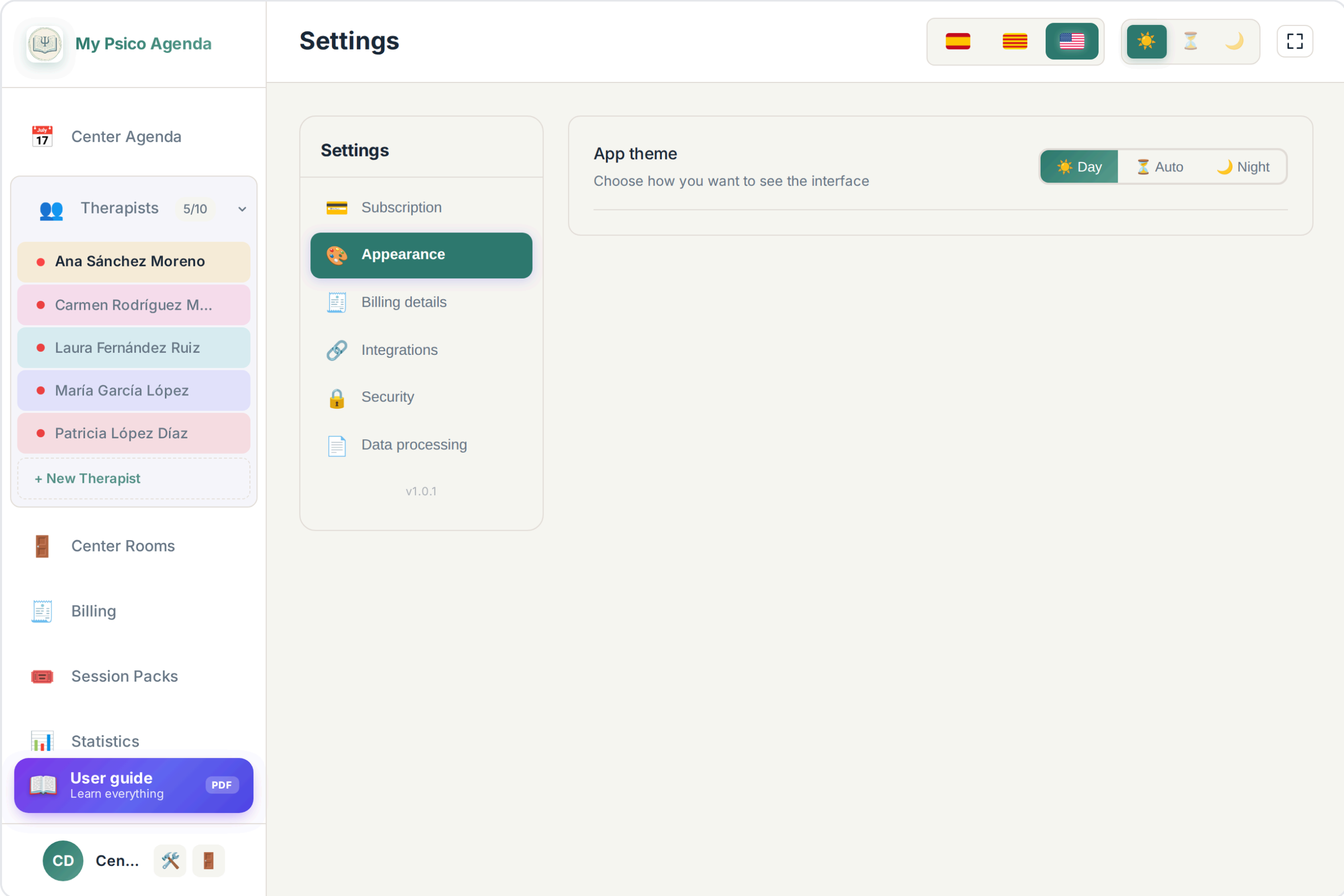
> 💡 **Tip:** That is why the **center's Settings do not show** a Google Integrations section: you don't have to connect or configure anything. Each therapist's sync works independently in their own account.

15 Settings, subscription and security

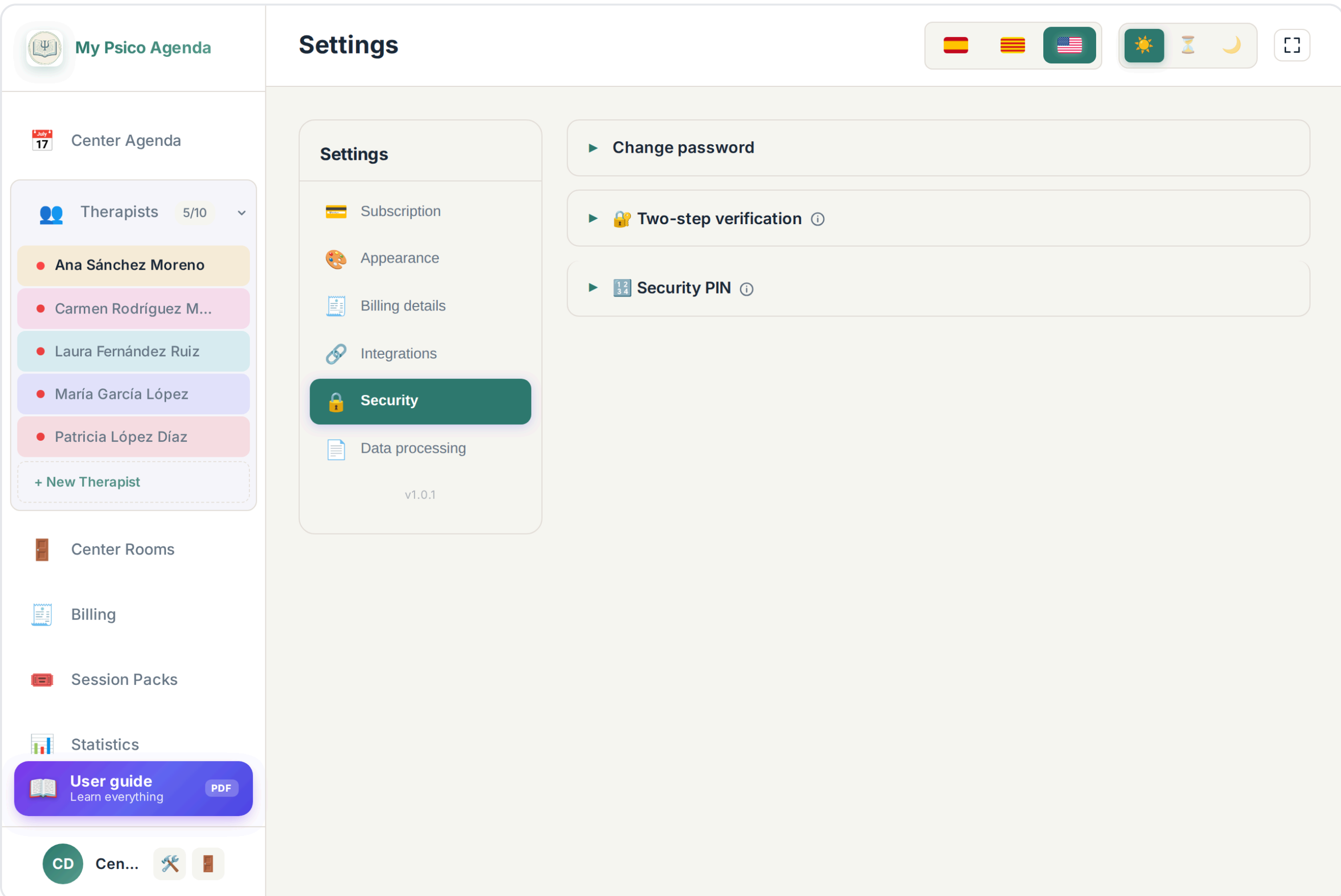
The **Settings** menu groups the center's general configuration: **Subscription** (your plan and the therapist limit), **Appearance** (the dashboard's look) and **Security**. In security you can change the password, enable **email 2FA**, set a **4-digit PIN** and, in addition, protect each tab of a therapist's profile with a PIN.



Settings · Subscription with the center's plan and therapist limit.



Settings · Appearance to customize the dashboard's look.



Settings · Security: password, 2FA, PIN and per-therapist-tab PIN.

1. In **Subscription**, review your current **plan** and the **therapist limit** it includes.
2. In **Appearance**, adjust the dashboard's look to your taste.
3. In **Security**, change the **password** and enable **email 2FA**.
4. Set a **4-digit PIN** to protect quick access.
5. If needed, enable the **per-tab PIN** on a therapist's profile to restrict access to sensitive information.

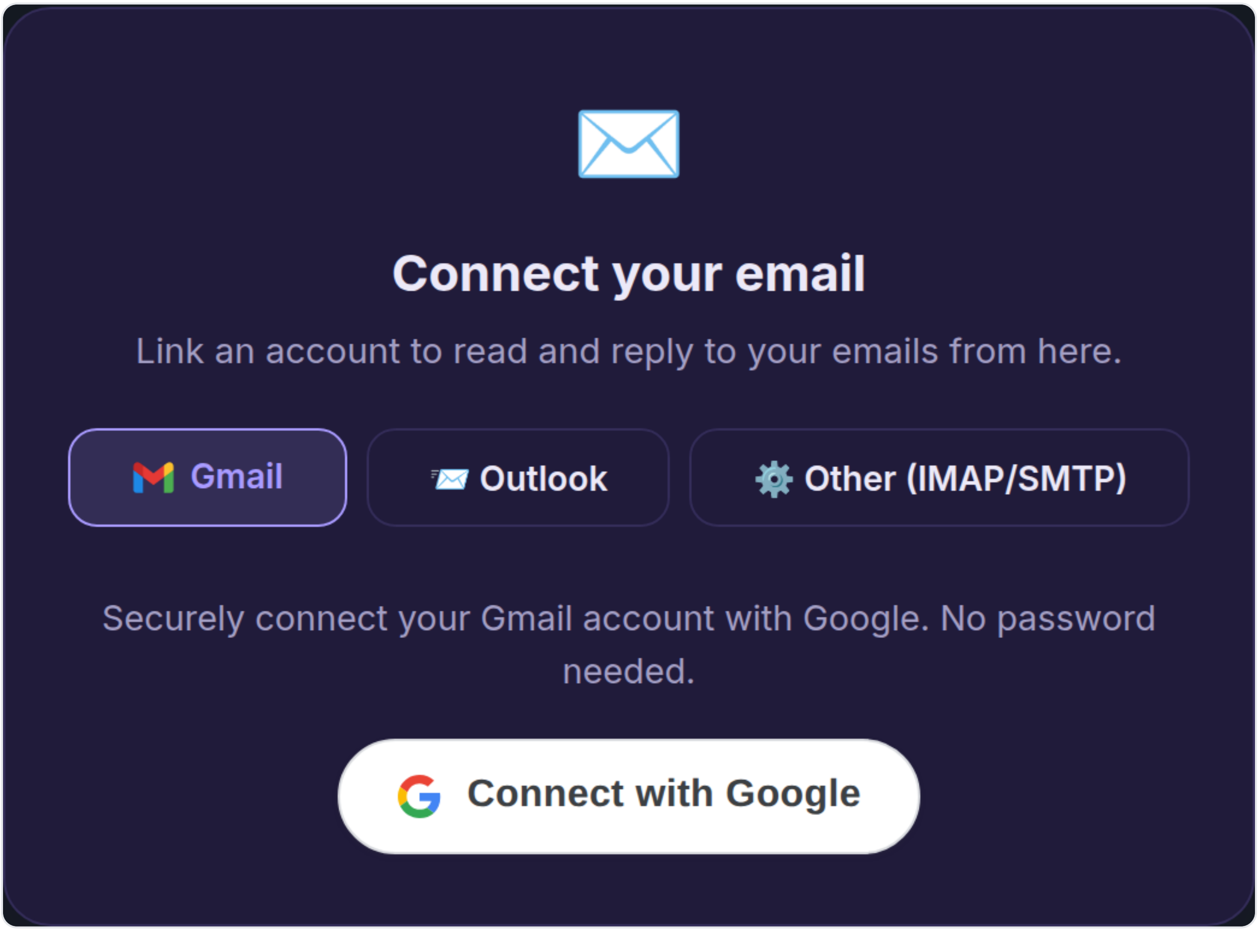
> 💡 **Tip:** Enable **2FA** and the **PIN** to strengthen the protection of clinical data: combining them with the per-tab PIN gives you fine-grained control over who sees what.

@ Email inbox

From **Inbox** (in the menu, under Contacts) you handle your practice's email without leaving the app: connect your **Gmail** or any **IMAP/SMTP** account and read, search and reply to your emails, with folders, attachments, embedded images and a signature.

1. Open **Inbox** in the side menu (under Contacts).
2. Click **Continue with Google** for Gmail, or choose "Other (IMAP/SMTP)", enter your server and use **Test connection**.
3. Read and **reply** to your emails; attach files, download attachments and delete messages with confirmation.
4. Set your **signature** (with an image) and the sender name from the ⋮ menu. The inbox **syncs** automatically every minute.

> **Tip:** You can also connect Gmail from **Settings → Integrations**. With Gmail you don't need a password: it connects securely with Google.



The Inbox: connect your Gmail or an IMAP/SMTP account.