



MY PSICO AGENDA

Center Manager Guide

Complete handbook for psychology centers

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



mysicoagenda.com

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.

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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 · mysicoagenda.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.

The screenshot displays the 'My Psico Agenda' application interface. On the left is a sidebar with a navigation menu including 'Agenda', 'Contacts', 'Centers', 'Billing', 'Session Packs', 'Statistics', 'Reminders', and 'Resources'. Below these are links for 'Agenda Support' and 'User guide'. The main area is titled 'Settings' and contains a list of settings: 'Subscription', 'Import' (highlighted), 'Appearance', 'Billing details', 'Integrations', 'Security', 'Data processing', and 'Consents'. The 'Import data' section is active, showing a progress bar with four steps: 1 Source, 2 File, 3 Review, and 4 Result. Below the progress bar, it asks 'What do you want to import?' with two options: 'Contacts' and 'Appointments'. Under 'From where?', there is a section for 'Any file' with a description: 'CSV or Excel from Doctoralia, eHolo or any other scheduler: we detect the columns automatically'. A 'Continue' button is at the bottom right.

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.

My Psico Agenda

17

Agenda

Contacts

Centers

Billing

Session Packs

Statistics

Reminders

Resources

Settings

Agenda Support

User guide

PT Pabl...

Settings

Subscription

Import

Appearance

Billing details

Integrations

Security

Data processing

Consents

v1.0.1

Import data

Bring your contacts and appointments from another scheduler (Doctoralia, eHolo) or from a CSV/Excel file. Contacts with the same phone or email are never duplicated.

1 Source

2 File

3 Review

4 Result

Auto-assigning columns

We're detecting and assigning the columns for you. You'll be able to review and correct them afterwards.

Auto-assigning columns...71%

Back

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

My Psico Agenda

17

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PT Pabl...

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Import

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v1.0.1

Import data

Bring your contacts and appointments from another scheduler (Doctoralia, eHolo) or from a CSV/Excel file. Contacts with the same phone or email are never duplicated.

1 Source

2 File

3 Review

4 Result

Columns assigned automatically. Review them and fix any that don't fit.

3 rows detected

Map the columns

First name *

Nombre completo

Last name

— don't import —

Phone

Teléfono móvil

Email

Correo electrónico

ID number

— don't import —

Address

— don't import —

Age

— don't import —

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.

The screenshot shows the 'Settings' page of 'My Psico Agenda'. The left sidebar contains navigation links: Agenda, Contacts, Centers, Billing, Session Packs, Statistics, Reminders, Resources, Settings (highlighted), Agenda Support, and User guide. The main content area is titled 'Settings' and features a list of settings on the left: Subscription, Import (highlighted), Appearance, Billing details, Integrations, Security, Data processing, and Consents. The 'Import data' section on the right explains that users can bring contacts and appointments from other schedulers or CSV/Excel files, noting that duplicates are never created. It shows a progress bar with four steps: 1 Source, 2 File, 3 Review, and 4 Result. Below the progress bar, a green checkmark indicates 'Import completed'. A summary table shows: 0 Contacts created, 3 Duplicates skipped, 0 Invalid, 0 Errors, and 3 Rows processed. A note states 'Contacts with the same phone or email are never duplicated.' and an 'Import another file' button is at the bottom right.

1 Source	2 File	3 Review	4 Result	
✓ Import completed				
0 Contacts created	3 Duplicates skipped	0 Invalid	0 Errors	3 Rows processed

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.

The screenshot displays the 'My Psico Agenda' manager dashboard. On the left is a side menu with the following items: 'Therapists' (5/10), 'Center Rooms', 'Billing', 'Session Packs', 'Statistics', 'User guide' (with a PDF icon), and a center profile block labeled 'CD' with the name 'Cen...'. The main area is titled 'Center Agenda' and shows a calendar for June 2026. The calendar is organized by day (Monday to Friday) and time slots. Each slot lists the therapist and the room. For example, on Monday, there are appointments at 09:00 (Sofia H., David F.), 10:00 (Carlos J., Ana T.), and 15:00 (Joan V., Laura M., Pere S.). The calendar also includes a 'Today' button and a 'Therapists' button. The top right of the dashboard shows flags for Spain, the United States, and the United Kingdom, along with weather and time zone indicators.

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.

The screenshot shows the 'My Psico Agenda' interface. The left sidebar contains navigation links: 'Therapists' (5/10), 'Center Rooms', 'Billing', 'Session Packs', and 'Statistics'. The main area is titled 'Center Agenda' and features a calendar for June 2026. At the top of the calendar, there is a dropdown menu set to 'All', navigation arrows, the month 'June 2026', and buttons for 'Today' and 'Therapists'. The calendar is organized by day (Monday to Friday) and time slots (09:00 to 17:00). Appointments are listed with therapist names and room names. For example, on Monday, there are appointments for Sofia H. and David F. at 09:00 and 10:00 respectively. On Tuesday, there is an appointment for Pilar B. at 10:00. On Wednesday, there are appointments for Marta G. and Jordi R. at 11:00 and 12:00 respectively. On Thursday, there are appointments for Clara V. and Hugo S. at 16:00 and 17:00 respectively. On Friday, there is an appointment for Manuel D. at 10:15. The interface also includes a 'User guide' button and a 'CD' button.

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

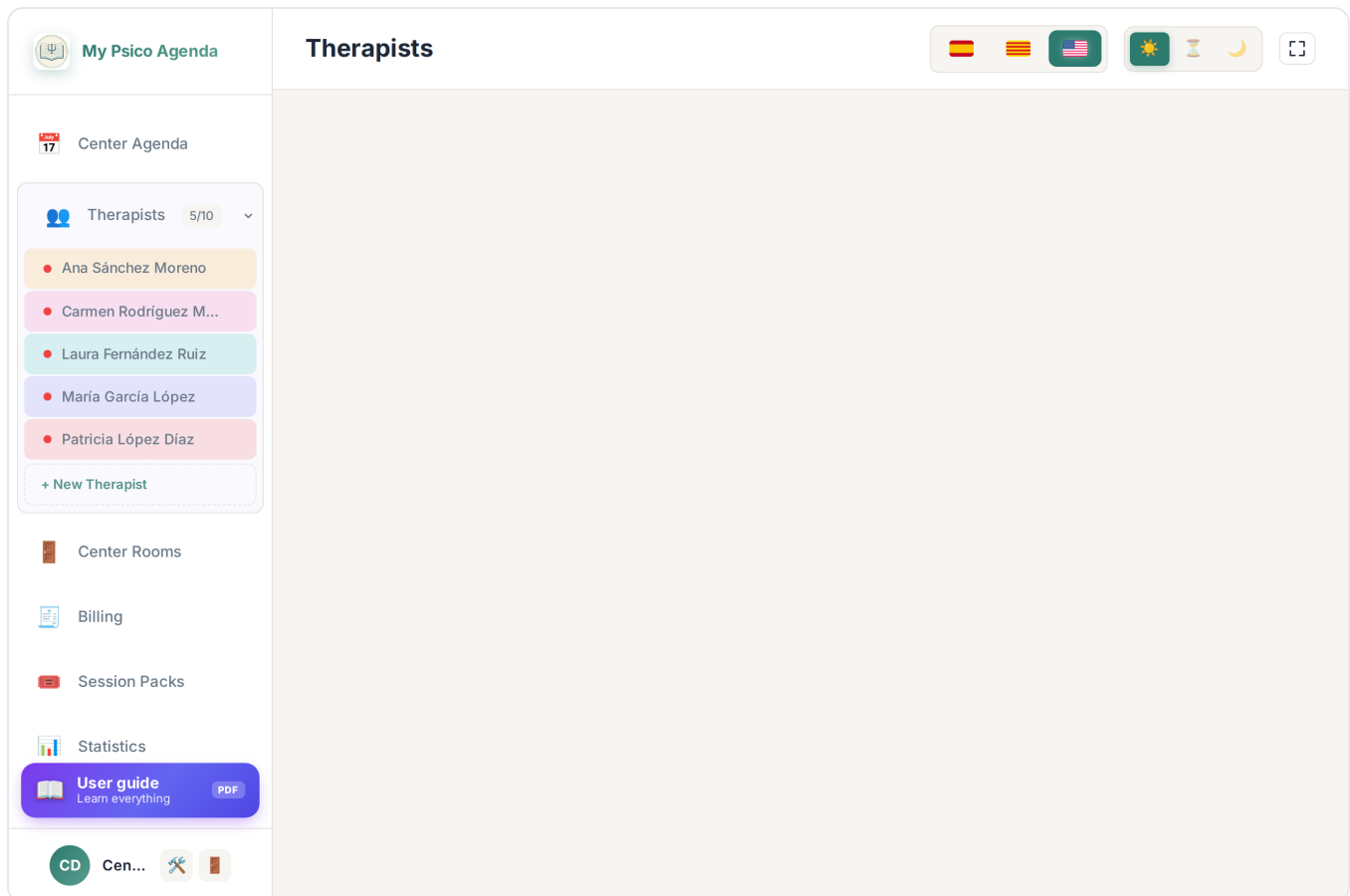
- 1 Select the **room tab** you want to check, or press **All** to see the combined occupancy.
- 2 Use the **week / month** navigation and the **Today** button to move through dates.
- 3 To create an appointment, click the free time slot and choose the **therapist** and the **room**.
- 4 Fill in the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

New Therapist

Full name
E.g.: Laura García Pérez

Email
terapeuta@email.com
An email will be sent to the therapist with the access link.

Password
Minimum 6 characters

Phone
Optional

Share this password with the therapist privately.

ID Number
Optional

Billing details ▶ Optional — can be filled later

Cancel Create Therapist

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.

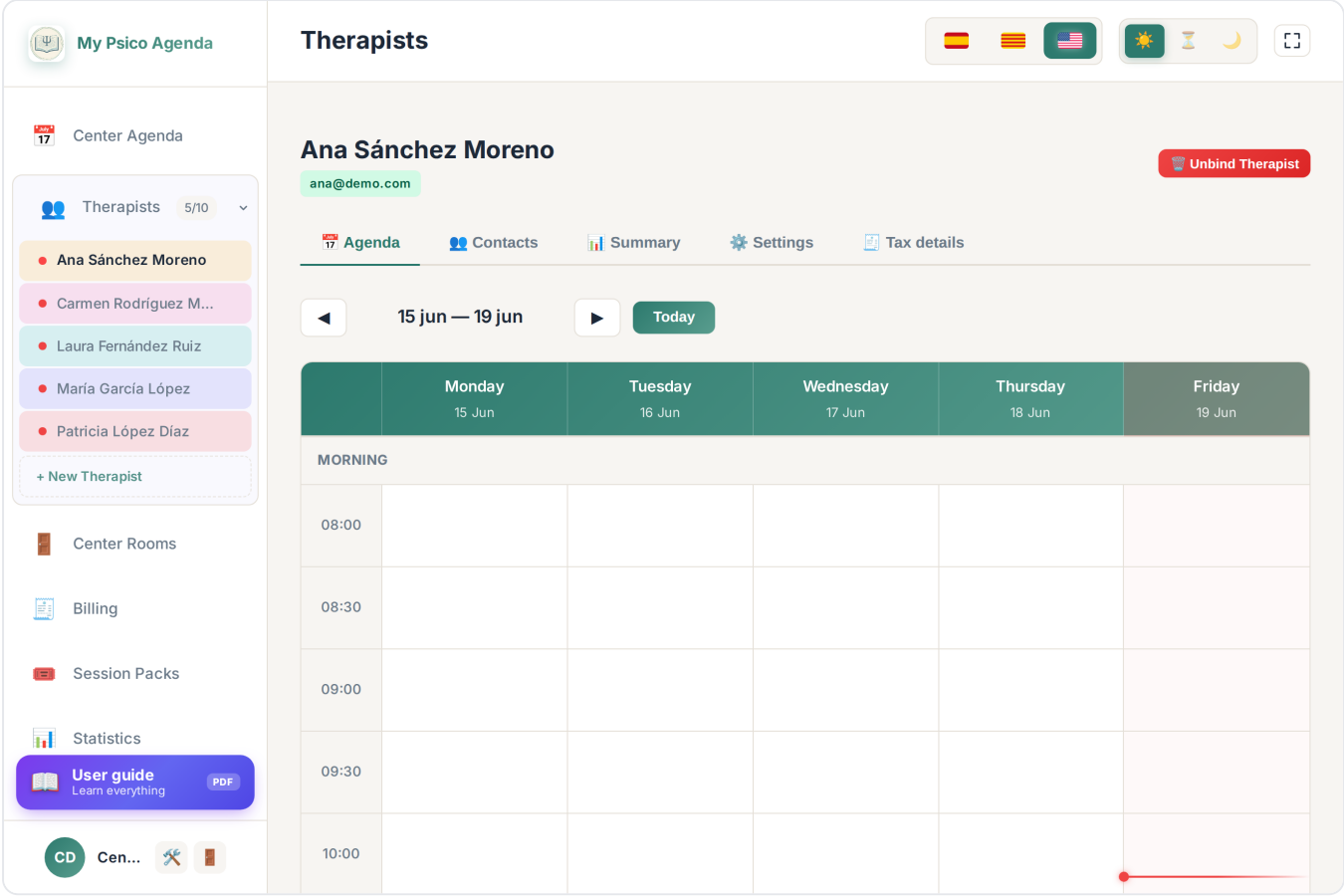


Tip: Share each therapist's **email and password** through a secure channel and advise them to change it on first login from their security settings.

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.



The screenshot displays the 'Therapists' section of the 'My Psico Agenda' application. On the left sidebar, under 'Center Agenda', there is a list of therapists, including 'Ana Sánchez Moreno'. The main content area shows the profile for 'Ana Sánchez Moreno' with email 'ana@demo.com' and an 'Unbind Therapist' button. Below the profile name are five tabs: 'Agenda' (selected), 'Contacts', 'Summary', 'Settings', and 'Tax details'. The 'Agenda' tab shows a calendar view for the week of June 15 to 19. The calendar grid has columns for each day and rows for time slots from 08:00 to 10:00. The 'MORNING' section is visible, and the grid is currently empty.

Therapist profile with its five management tabs.

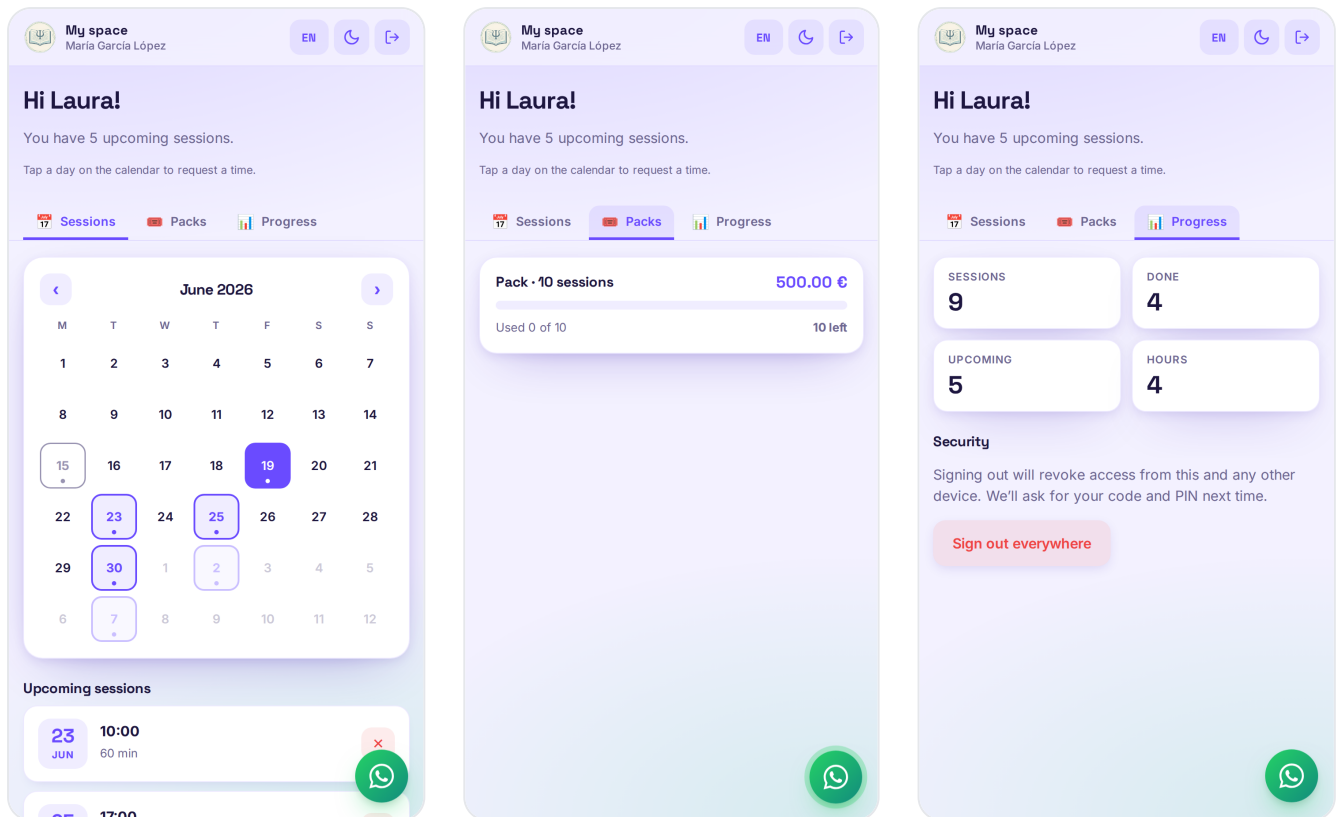
- 1 In  **Calendar**, view and create appointments on behalf of the therapist.
- 2 In  **Contacts**, add patients and, if needed, **transfer a patient** to another therapist.
- 3 In  **Summary**, review the professional's individual statistics.
- 4 In  **Settings**, assign the therapist's **color** and 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.

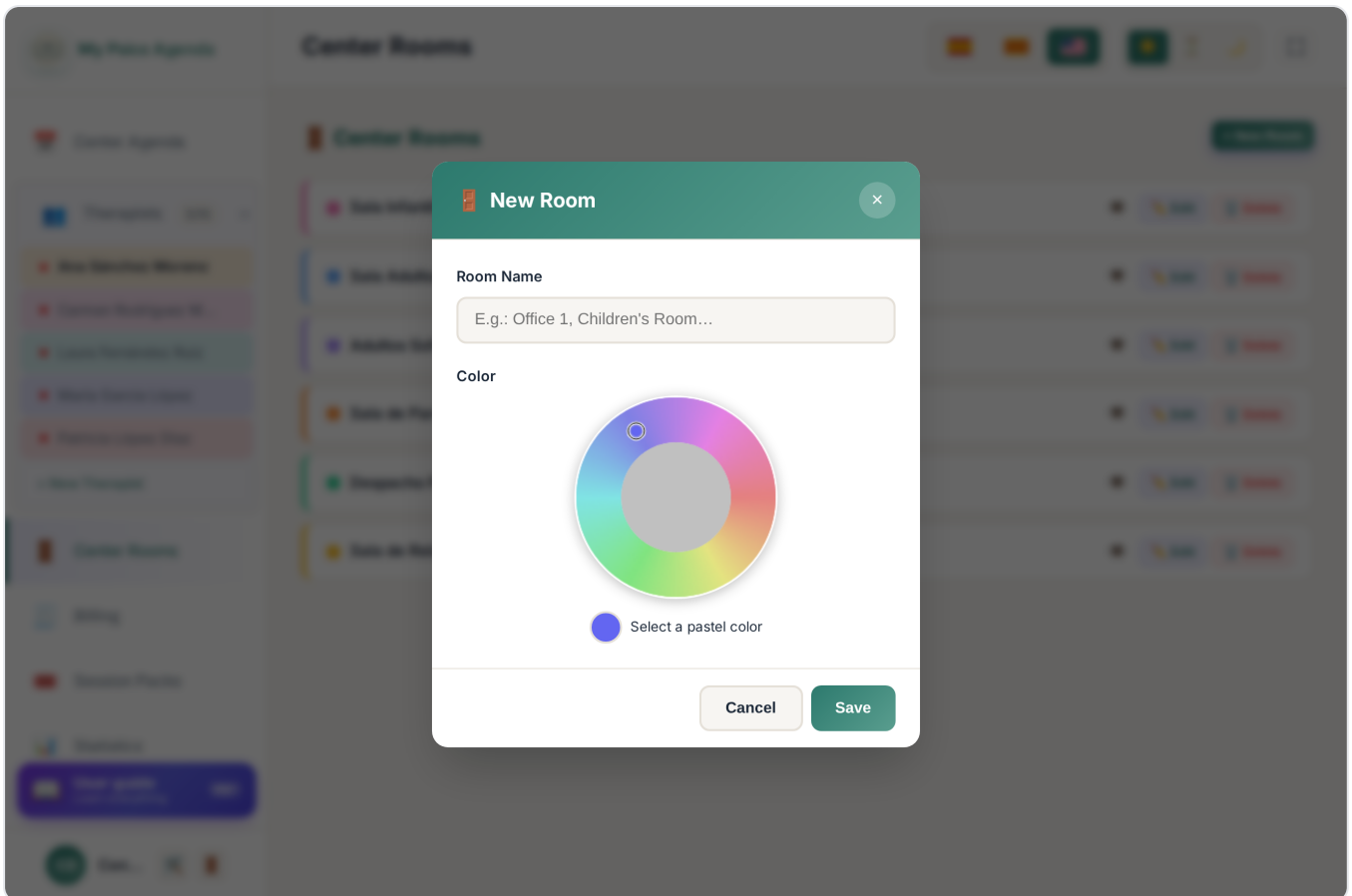
8 Center rooms

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.

The screenshot shows the 'Center Rooms' management interface. On the left is a sidebar with navigation options: 'My Psico Agenda', 'Center Agenda' (with a calendar icon and '17'), 'Therapists' (with a group icon and '5/10'), 'Center Rooms' (selected, with a room icon), 'Billing', 'Session Packs', 'Statistics', 'User guide' (with a PDF icon), and a bottom bar with 'CD', 'Cen...', and a settings icon. The main area is titled 'Center Rooms' and features a '+ New Room' button. It displays a list of six rooms, each with a colored dot, name, and 'Edit'/'Delete' buttons: 'Sala Infantil' (pink), 'Sala Adultos 1' (blue), 'Adultos Sofás' (purple), 'Sala de Parejas' (orange), 'Despacho Privado' (green), and 'Sala de Relajación' (yellow). At the top right of the main area are language and theme selection icons.

Room Name	Color	Edit	Delete
Sala Infantil	Pink	Yes	Yes
Sala Adultos 1	Blue	Yes	Yes
Adultos Sofás	Purple	Yes	Yes
Sala de Parejas	Orange	Yes	Yes
Despacho Privado	Green	Yes	Yes
Sala de Relajación	Yellow	Yes	Yes

Center Rooms with the list of available consulting rooms.



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

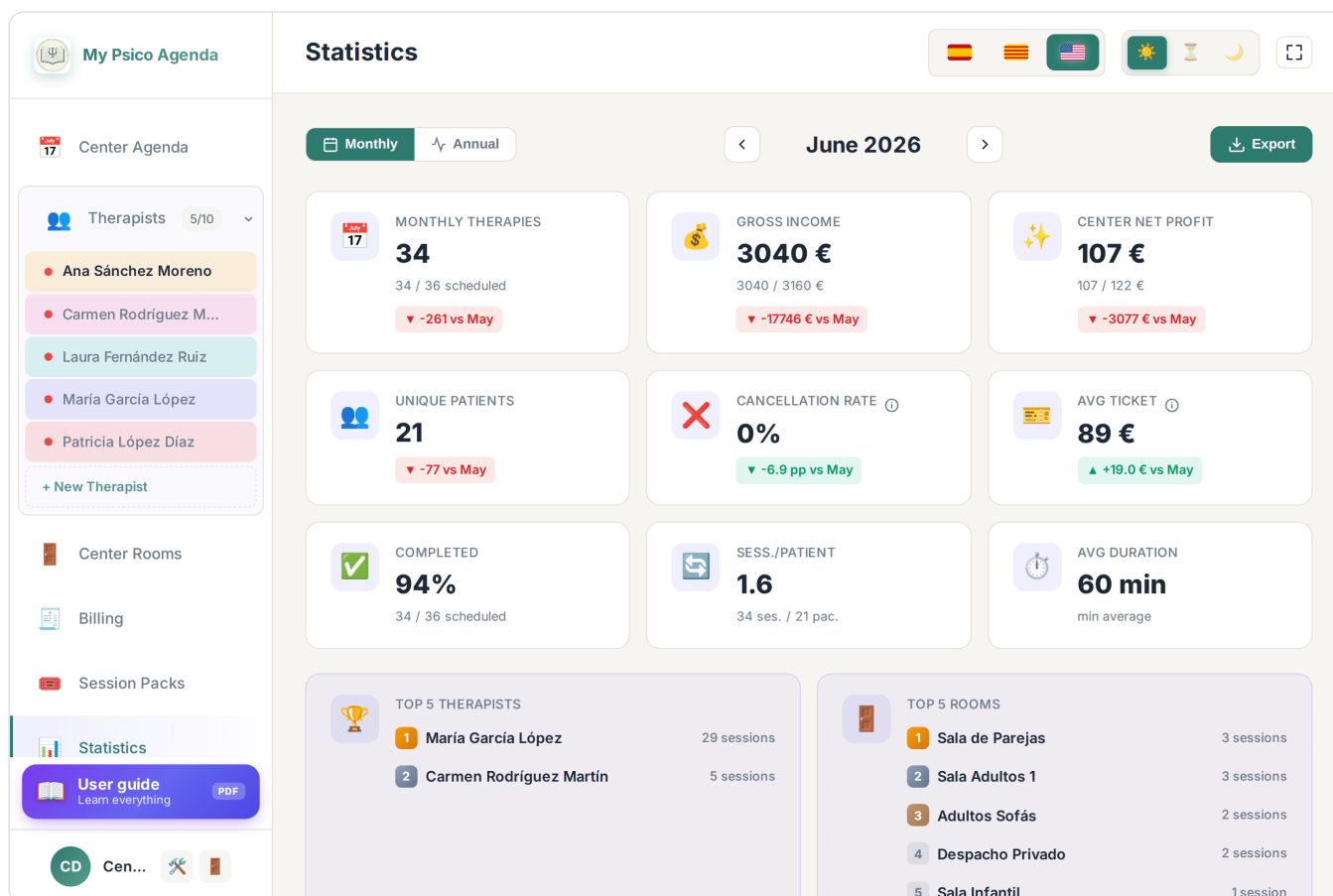
- 1 Open **Center Rooms** from the side menu.
- 2 Press to **create a new room**.
- 3 Type the room's **name** and pick a distinctive **color**.
- 4 Save: the room becomes available to assign in appointments and appears as a tab in the Center Calendar.



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.

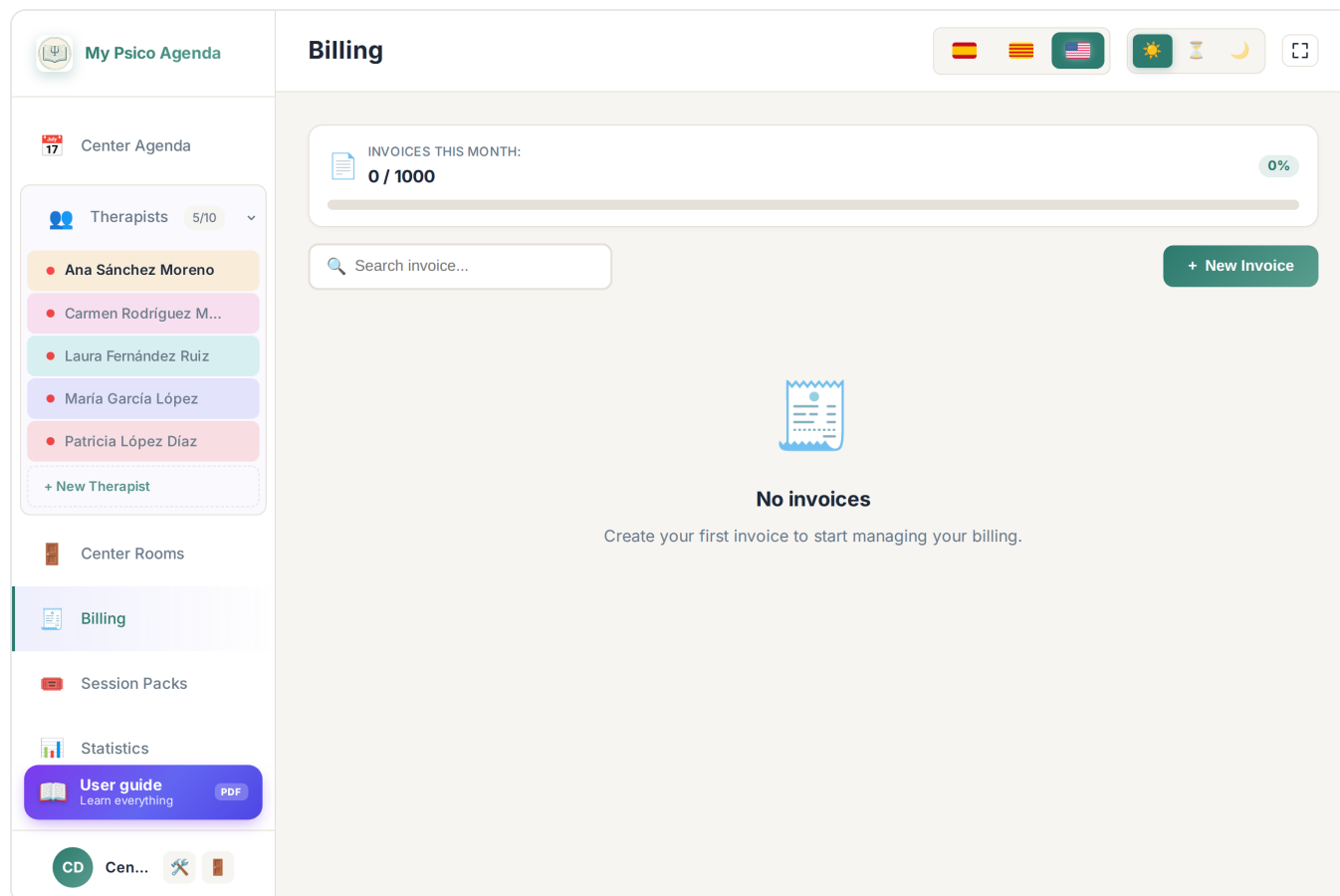
- 1 Open **Statistics** from the side menu.
- 2 Choose the period in the toolbar: **Monthly** or **Annual**.
- 3 Review the overall **KPIs** and check the **Top 5 Therapists** and **Top 5 Rooms** rankings.
- 4 Use the **export** option to download the period's data.



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.

The screenshot shows the 'Session Packs' section of the 'My Psico Agenda' application. On the left is a sidebar menu with options: Center Agenda, Therapists (5/10), Center Rooms, Billing, Session Packs (highlighted), Statistics, and a User guide PDF. The main area is titled 'Session Packs' and includes a search bar and a '+ New session pack' button. It displays a list of six active session packs, each created by María García López. Each pack shows the therapist's name, the number of sessions (e.g., 1-10), a progress bar indicating usage (e.g., 0/10), the total price (e.g., 500.00 €), and the payment method (Card or Cash).

Therapist	Sessions	Usage	Price	Payment Method
Laura Martín Ruiz	1-10	0/10	500.00 €	Card
Carlos Jiménez Soler	1-10	0/10	500.00 €	Card
Marta Herrera Reyes	1-5	0/5	270.00 €	Cash
Andrea Ortiz Molina	1-8	0/8	432.00 €	Cash
Sofía Navarro Soler	1-5	0/5	250.00 €	Bizum

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.

The screenshot displays the 'Reminders' section of the 'My Psico Agenda' application. The sidebar on the left includes navigation links for 'Center Agenda', 'Therapists' (5/10), 'Center Rooms', 'Billing', 'Session Packs', 'Statistics', and a 'User guide' PDF. The main content area is titled 'Reminders' and features three sections: 'Today's appointments' with three time slots (10:00 - 11:00, 17:00 - 18:00, 18:00 - 19:00) each showing a therapist name and a 'Recordar' button; 'Tomorrow's appointments' with 'No scheduled appointments'; and 'Appointments in 3 days' with 'No scheduled appointments'. The top right of the main area contains language and theme selection icons.

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.

The screenshot displays the 'Settings · Billing details' interface. On the left, a sidebar lists navigation items: 'Therapists' (5/10), 'Center Rooms', 'Billing', 'Session Packs', 'Statistics', and a 'User guide' (PDF). The main area is titled 'Settings' and features a 'Billing details' section. Within this section, the 'Tax details' form is visible, which includes the following fields: 'Tax name / Legal name' (filled with 'Bienestar Mental S.L.'), 'Tax ID' (filled with 'B12345678'), 'Address' (filled with 'Calle Gran Vía 42, 3ºA, 28013 Madrid'), 'Postal code' (filled with '17200'), 'City' (filled with 'Barcelona'), 'Province' (filled with 'Barcelona'), and 'Country' (filled with 'España'). A 'Save tax details' button is located at the bottom right of the form. The top of the page shows a header with the application name 'My Psico Agenda' and various utility icons.

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

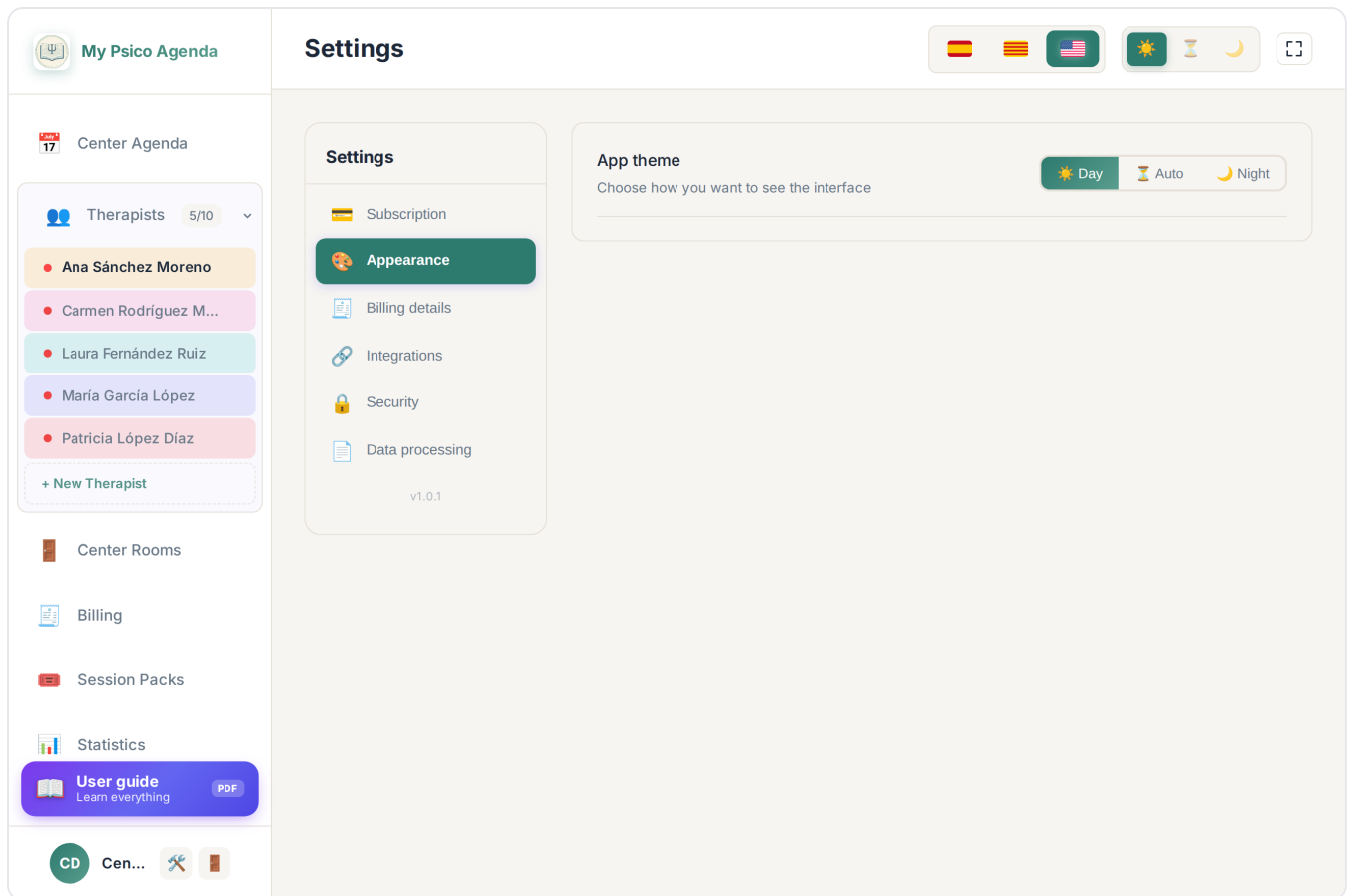
The **Settings** menu groups the center's general configuration: **Subscription** (your plan and the therapist limit), **Appearance** (the dashboard's look) and **Security**. In security you can change the password, enable **email 2FA**, set a **4-digit PIN** and, in addition, protect each tab of a therapist's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

The screenshot displays the 'My Psico Agenda' interface. On the left is a sidebar with navigation options: 'Center Agenda' (with a '17' badge), 'Therapists' (5/10), 'Center Rooms', 'Billing', 'Session Packs', 'Statistics', 'User guide' (PDF), and a user profile 'CD Cen...'. The main content area is titled 'Settings' and features a 'Subscription' section. This section shows the 'Super' plan at 199.99€/mes, which is 'Active'. It includes a table with the following details:

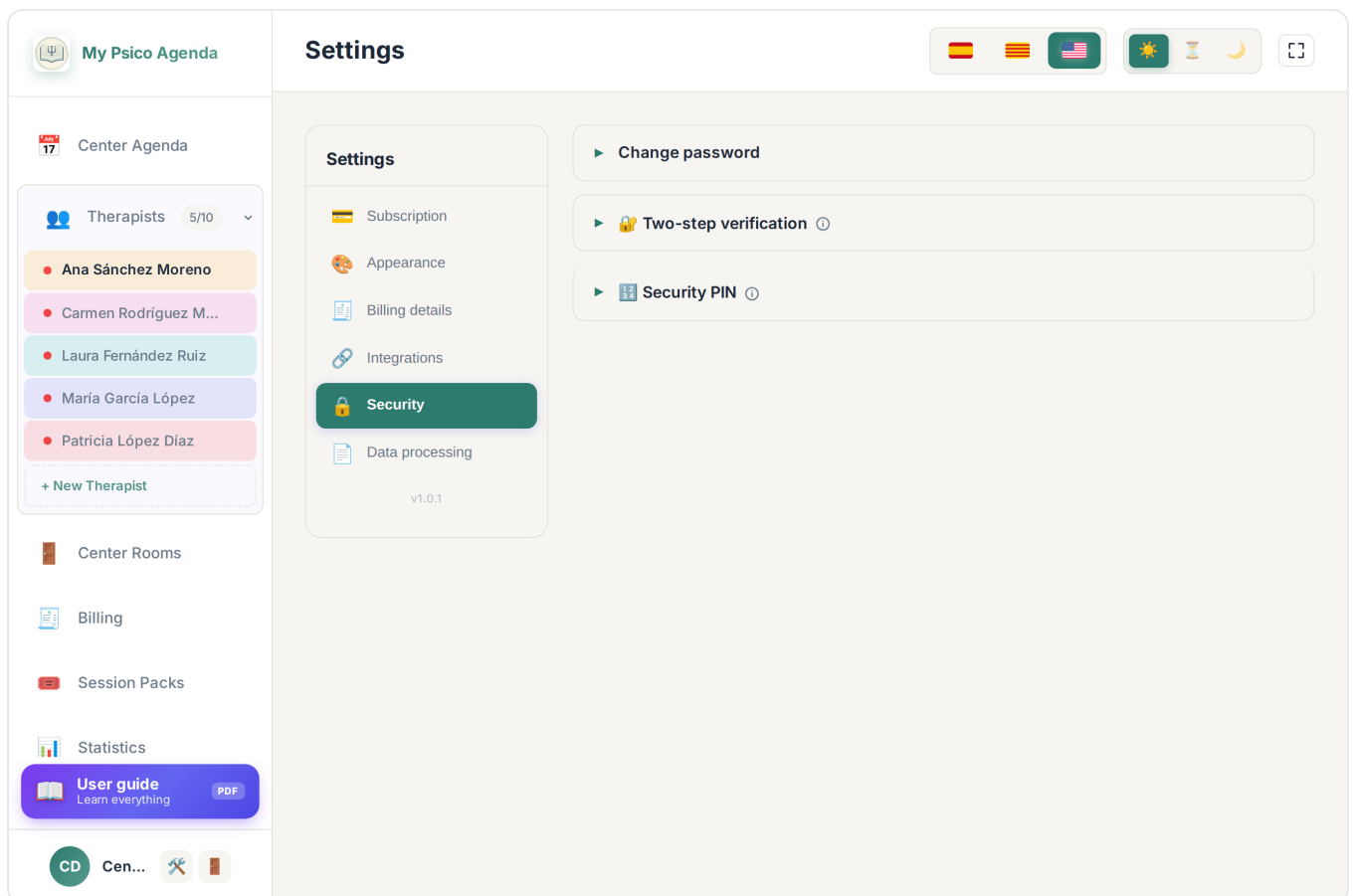
TIME REMAINING	EXPIRATION DATE
314d 08h 23m 52s	29 de abril de 2027 a las 18:46
ALLOWED THERAPISTS	VERIFACTU INVOICES/MONTH
10	1000

Below the table, it indicates 'Auto-renewal active' with a 'Disable' button. A 'Change plan' button is located at the bottom of the subscription details. A 'Settings' menu on the left of the main content area lists: Subscription, Appearance, Billing details, Integrations, Security, and Data processing (v1.0.1).

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.



Connect your email

Link an account to read and reply to your emails from here.

 Gmail

 Outlook

 Other (IMAP/SMTP)

Securely connect your Gmail account with Google. No password needed.



Connect with Google

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