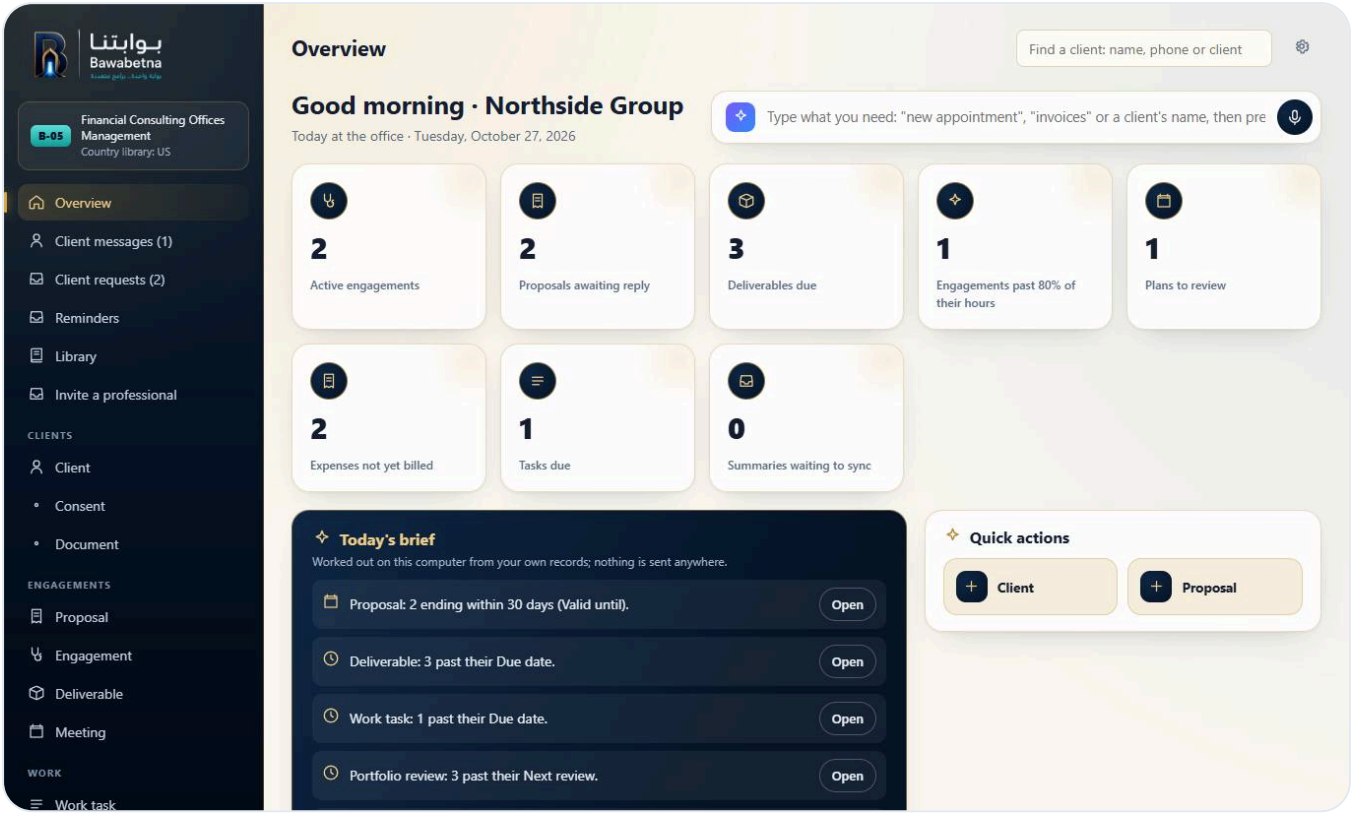
Bawabetna · User guide

Financial Consulting Offices Management

Every screen and every button, with real screens from the program.

Guide version 2026-10-27



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Getting started

Download the program from bawabetna.com or the Microsoft Store and install it. On first opening, sign in with your Bawabetna account. The first month is free with every feature.

The first-run assistant asks for a few details, then the program is ready:

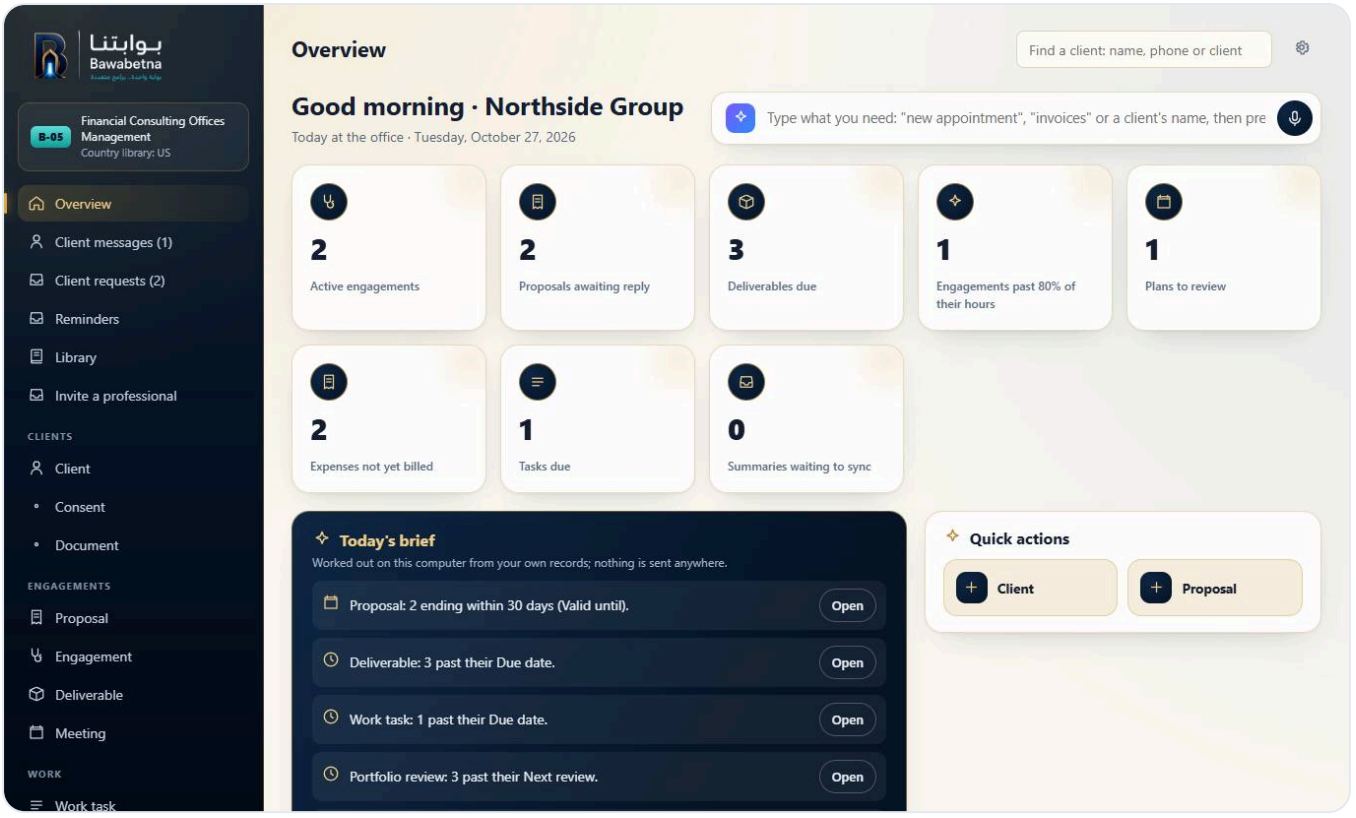
1. **Consulting office**: Name, License number, Country, Default currency
2. **Branch**: Name, Phone
3. **Consultant**: Full name, License number, Seniority, Hourly rate

Each person signs in with their own role and sees only the screens of that role:

- Analyst
- Billing
- Consultant
- Manager
- Office owner
- Partner

The home screen

The home screen shows today's work at a glance: counts, today's schedule, what is waiting and requests from clients. The command bar at the top opens any screen from a short sentence, such as a client's name or "new appointment".

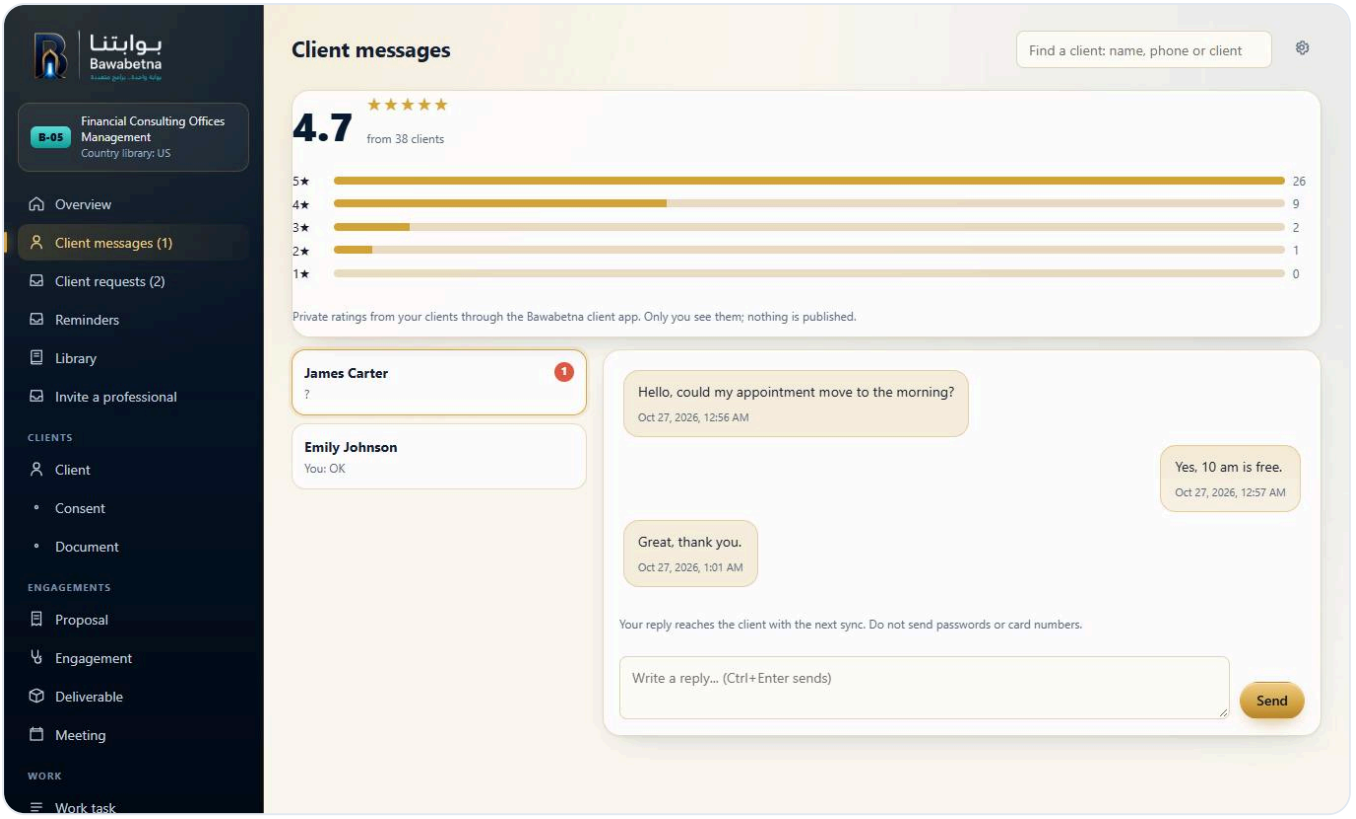


The home screen

Screens and what you record in them

The side menu groups the screens by kind of work. Each screen lists its records: New adds one, a click opens it, and the buttons at the bottom of a record move it to its next stage.

Clients



Client

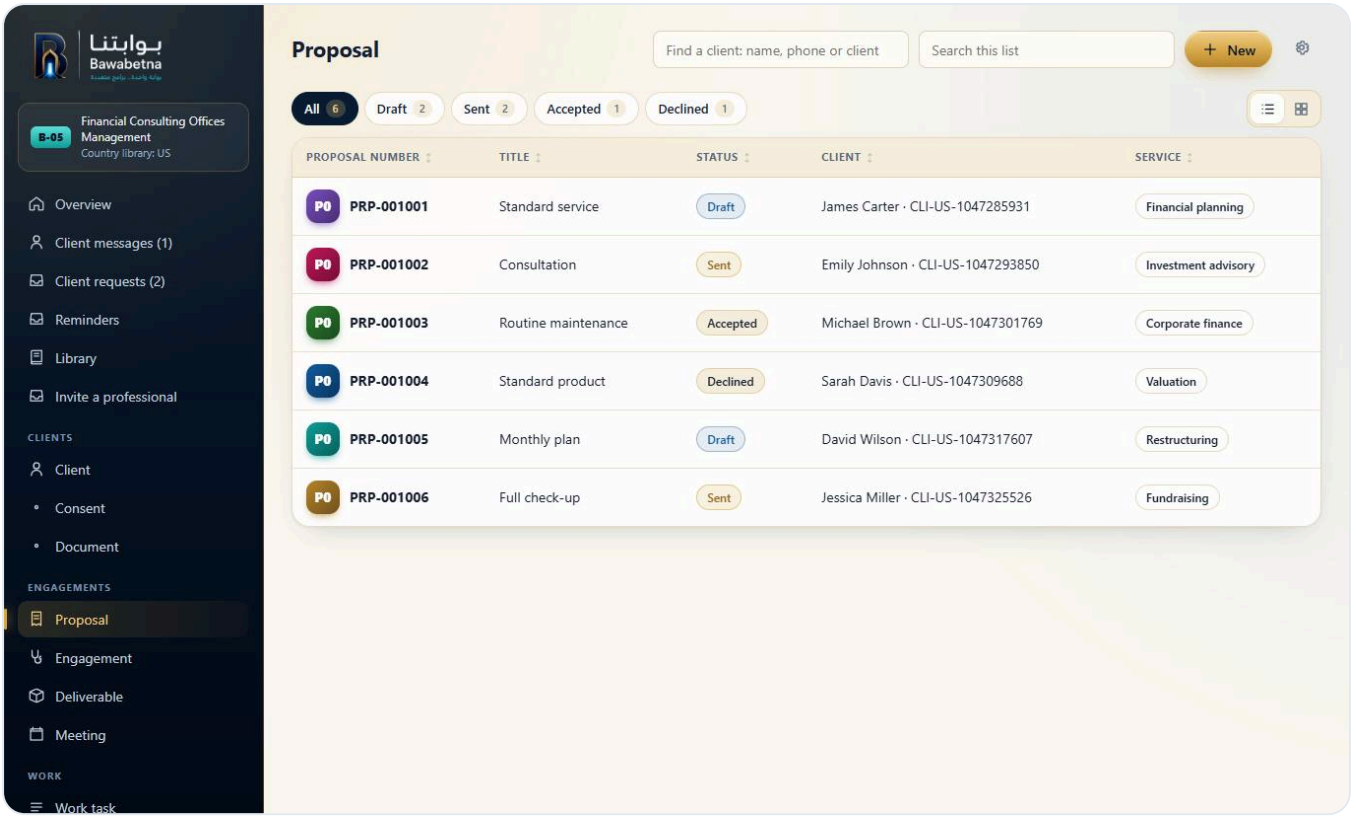
Client

What you record: Full name (required), Client type (required), Commercial registration, Sector, Email, Phone, Client code, Ecosystem registration, Identity country, Official identity number (required), Notes

Document

What you record: Client (required), Engagement, Category (required), Title (required), Reference number, Issued on, Expires on, Files

Engagements



Proposal

Proposal

What you record: Proposal number (worked out by the program), Client (required), Title (required), Service (required), Consultant (required), Scope (required), Proposed fee, Currency (required), Valid until, Status (required), Decline reason, Files

Stages: A new record starts as "Draft".

Draft → Sent | Sent → Accepted | Sent → Declined | Sent → Draft

Engagement

What you record: Engagement number (worked out by the program), Client (required), Proposal, Title (required), Service (required), Consultant (required), Billing method (required), Agreed fee, Budget hours, Start date (required), End date, Status (required), Notes, Hours used (worked out by the program), Hours remaining (worked out by the program), Budget used percent (worked out by the program), Budget flag (worked out by the program)

Stages: A new record starts as "Active".

Active → On hold | Active → Completed | Active → Cancelled | On hold → Active | On hold → Cancelled

Deliverable

What you record: Engagement (required), Client (worked out by the program), Title (required), Kind (required), Due date (required), Status (required), Accepted on (worked out by the program), Client feedback, Files

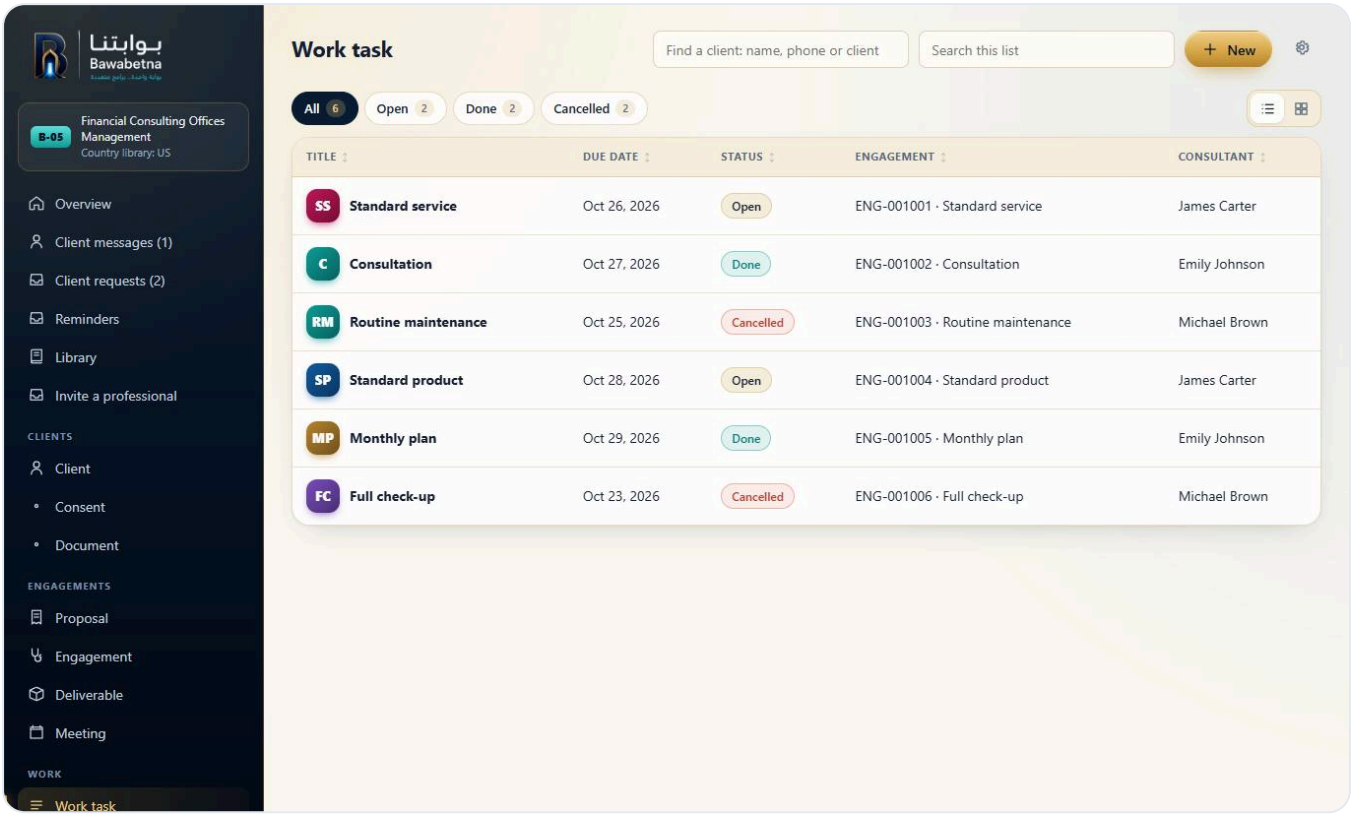
Stages: A new record starts as "In progress".

In progress → Submitted | Rework → Submitted | Submitted → Accepted | Submitted → Rework

Meeting

What you record: Engagement (required), Held at (required), Subject (required), Visit mode, Meeting link, Attendees, Mode, Minutes, Action items

Work



Work task

Work task

What you record: Engagement (required), Title (required), Consultant, Due date (required), Priority, Status (required)

Stages: A new record starts as "Open".

Open → Done | Open → Cancelled

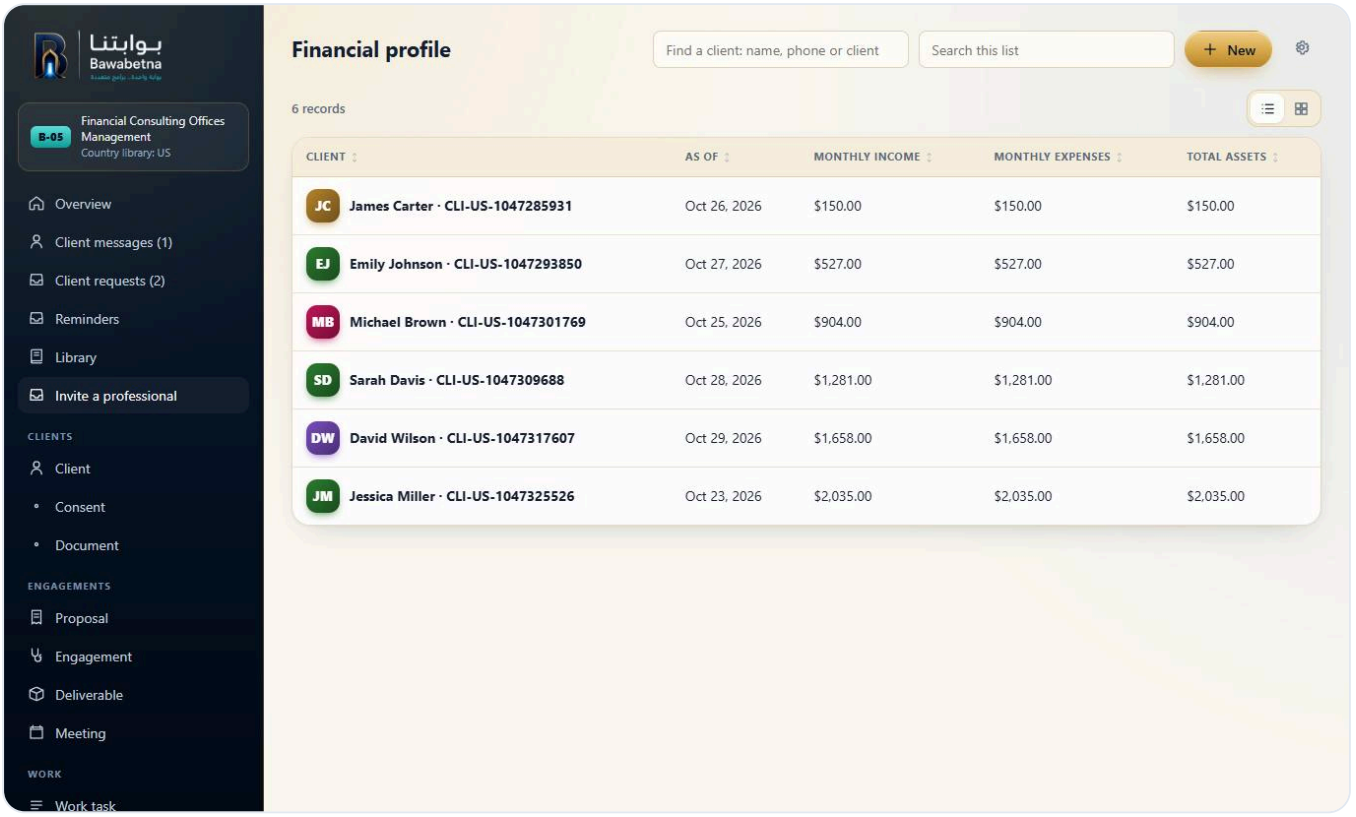
Time entry

What you record: Engagement (required), Consultant (required), Work date (required), Hours (required), Rate (required), Description (required), Billable, Invoiced lines (worked out by the program), Unbilled hours (worked out by the program)

Expense

What you record: Engagement (required), Client (worked out by the program), Consultant, Spent on (required), Expense category (required), Description (required), Amount (required), Markup percent, Billable amount (worked out by the program), Billing status (required), Files

Planning



Financial profile

Financial profile

What you record: Client (required), As of (required), Monthly income, Monthly expenses, Total assets, Total liabilities, Emergency fund, Dependents, Goals

Risk assessment

What you record: Client (required), Assessed on (required), Score (required), Conservative below, Aggressive above, Risk profile (worked out by the program), Investment horizon years, Notes

Financial plan

What you record: Client (required), Engagement, Title (required), Plan type (required), Recommendations, Review date (required), Status (required), Delivered on (worked out by the program)

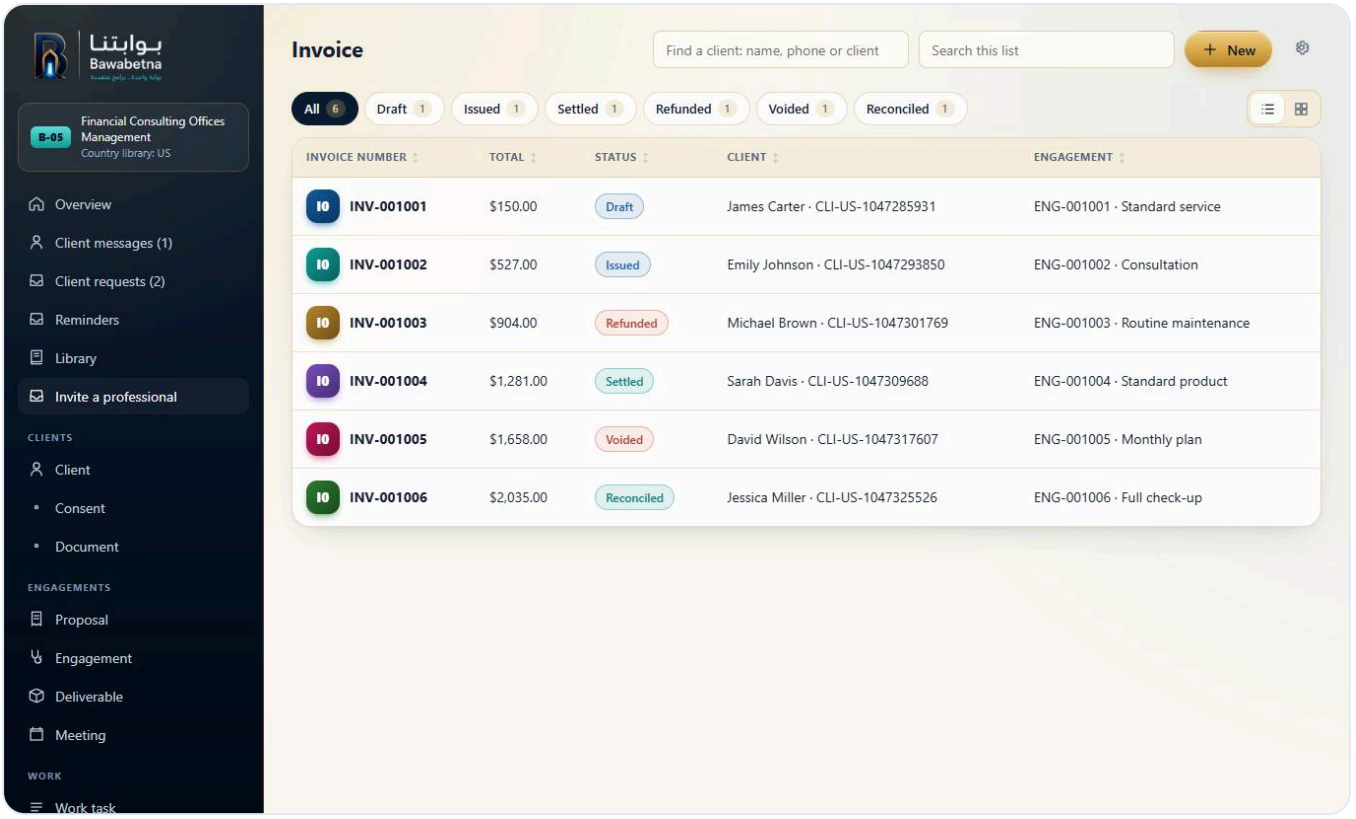
Stages: A new record starts as "Draft".

Delivered → Superseded | Draft → Delivered

Portfolio review

What you record: Client (required), Reviewed on (required), Portfolio value, Return percent, Rebalancing advice, Next review

Billing



Invoice

Invoice

What you record: Invoice number (worked out by the program), Client (required), Engagement, Currency (required), Issued at (worked out by the program), Subtotal (worked out by the program), Tax total (worked out by the program), Total (worked out by the program), Paid (worked out by the program), Refunded (worked out by the program), Net paid (worked out by the program), Balance (worked out by the program), Status (required), E invoice reference, Notes

Stages: A new record starts as "Draft".

Draft → Issued | Draft → Voided | Issued → Voided | Refunded → Reconciled | Settled → Reconciled

Invoice line

What you record: Invoice (required), Time entry, Description (required), Quantity (required), Unit price (required), Discount, Vat rate (required), Line net (worked out by the program), Line tax (worked out by the program), Line total (worked out by the program)

Payment

What you record: Receipt number (worked out by the program), Invoice (required), Amount (required), Method (required), Transaction reference, Paid at (worked out by the program)

Refund

What you record: Refund number (worked out by the program), Payment (required), Invoice (worked out by the program), Amount (required), Reason (required), Refunded at (worked out by the program)

Setup

Consulting office

What you record: Name (required), License number, Country (required), Tax number, Default currency, Whatsapp enabled, Online meeting link, Payment link, Review link, Ai assistant enabled, Ai model, Ai endpoint

Branch

What you record: Consulting office (required), Name (required), Address, Phone

Consultant

What you record: Branch (required), Full name (required), License number, Hourly rate, Seniority, Active

Reports

Reports are worked out on your computer from your records. Choose a period, see the chart and the table, then print or export them. The reports of this program:

- Proposals by status
- Engagements by service
- Hours by staff
- Hours by engagement
- Revenue by month
- Revenue by service
- Collections by payment method

- Outstanding balances by client
- Expenses to bill
- Receivables aging (days since issue)
- Unbilled work in progress by age (days)
- Unbilled hours by engagement

Working with your clients

A client with a Bawabetna Client Code can, from the free client app: book an appointment, write to you, send requests and documents, sign documents, see what they owe and pay you directly, tell you they have arrived, ask for an earlier time and see their points. Everything reaches this program with its next sync.

Your data

Your records are kept encrypted on your own computer; only a short summary of each transaction is sent to Bawabetna. Make a backup from Settings; it is encrypted with your recovery key.

Help

Write to info@bawabetna.com or use the contact page at bawabetna.com/contact.