toworkfrom.

GUIDE FOR OWNERS AND STAFF

This guide covers what toworkfrom does today. A short list of what isn't ready yet is at the end.

toworkfrom runs on the web, iPhone and Android. It's the same on all three: on a phone the main places are along the bottom, on the web they're down the left side.

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The latest version of this guide is on the toworkfrom website, under Help.

1 Getting started

Log in

1. Open toworkfrom and enter your email.
2. Tap **Send code**. A 6-digit code arrives by email and works for 10 minutes.
3. Enter the code and tap **Log in**.

There are no passwords. Everyone logs in this way: you, your staff and your members.

Create your space

The first time, you'll see **Create your space**. Enter your name, the space's name, the country and the city. The time zone and currency fill in from the country, and you can change them. Tap **Create space**.

Your 35-day free trial starts that day. No card is needed.

Set up in this order

Doing these once, in this order, means everything after works properly.

1. **Settings → Opening hours and location.** Set when you open and close. Then stand inside your space and tap **Use my current location**, so members can check themselves in.
2. **Settings → Tax.** The tax name and rate. In India, invoices show it as CGST and SGST, half each.
3. **Settings → Invoice details.** Your legal name, GSTIN, address, bank details, and the invoice prefix. The prefix and the month your year starts are fixed once the first invoice is issued, so check them now.
4. **Settings → Payments.** Your UPI ID and QR, and Razorpay if you want members to pay online (see section 6).
5. **Plans.** Add what you sell (section 2).
6. **Members.** Add your members and give each a membership (section 3).

2 Plans, rooms and add-ons

Open **Plans** (under **More** on a phone). It has three tabs.

Plans

Tap **New plan** and choose the type:

- **Hot desk**: a number of shared seats.
- **Dedicated desk**: named desks, each for one person.
- **Private cabin**: named cabins, each with a number of seats.

Then set:

- **Name members see.**
- **Sold by**: day, week, month, quarter or year.
- **Monthly price**, and a percentage off for quarterly and yearly if you offer one.
- **Day price** and **Week price** for passes.
- **Set hours**, for a shift such as a night desk.
- **Free meeting-room hours**, per seat, per month. They reset each month and don't carry over.
- **Show to members**, on or off.

What members pay shows the price with tax as you type.

Changing a price. Edit the plan and choose the date it starts from. Members already on the plan keep the old price until their first renewal on or after that date. New members pay the new price. Special prices you agreed with one member stay as they are.

Archiving. Archive plan hides it from new sales. Members on it keep it until they leave.

Meeting rooms

Tap **New room**. Set the name, the member rate an hour, the walk-in rate an hour, opening times and days, and optionally:

- a gap after each booking, for cleaning
- the longest booking allowed
- how many days ahead it can be booked

- how many hours before the start a booking can be cancelled free
- whether members' or walk-ins' bookings need your approval

Rooms are booked in 30-minute steps.

Add-ons

Extras such as lockers, parking or mail handling. Set a monthly price and how many there are. An add-on is billed on the member's invoice for the same period as their plan.

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3 Members

Add a member

1. Open **Members** and tap **Add member**.
2. Enter their name and email, and phone if you have it. Choose **No company**, **Their company** or **New company**.
3. Tap **Add and send invite**. They get an email to open toworkfrom and log in.

Their email is their login, so it can't be changed once they've opened the app. Add a phone number if you want them to get WhatsApp messages.

Give them a membership

1. On their profile, tap **New membership**.
2. Choose the start date, the plan or plans, the desks or cabins, and any add-ons.
3. Choose **Billed every** month, quarter or year.
4. If you've agreed a special price, turn on **Special price (deal)**: a percentage off or a fixed price, with a note that shows on the invoice.
5. Tap **Create membership**.

The first invoice is made straight away and emailed. The membership shows **Awaiting first payment** and becomes **Active** once that invoice is paid.

Companies

A company has several people, one membership and one invoice. On the company's profile you can **Add person**, set the **Billing contact** (who gets the invoices), and fill in billing details

such as the GSTIN and address.

Documents

On a member's or company's profile, **Documents** holds their ID document, a company's GST certificate, an authorisation letter, or anything else.

1. Tap **Add document** and choose what kind it is.
2. Give it a name and tap **Choose file**. On a phone that's a photo; on the web it can also be a PDF. Up to 10 MB.
3. For anything other than an ID, switch on **Member can see this** if you want them to see it in their app. It's off unless you turn it on.
4. Tap **Save document**.

Tap a document to open it, change who can see it, or delete it.

- **Who sees what.** You and your manager see everything. Your accountant sees everything except ID documents. Front desk sees only "ID on file ✓".
- **Members** can add their own ID document from their app, and always see their own.
- **Kept safe.** Files are stored encrypted, open through links that last 10 minutes, and every opening is noted in the activity log.
- **ID documents are deleted automatically** 90 days after the membership ends.

Join link and requests

In **Members**, tap **Share join link**. You get a link and a QR code, and you can **Print the QR poster** for your door.

Anyone who opens it can ask to join, book a meeting room, or buy a day pass, with no app needed. Requests to join wait under **Members → Requests**, where you **Approve**, **Reply** or **Reject**.

The tabs in Members

- **Active**: members with a running plan.
- **Requests**: people who asked to join through your link.
- **Leaving & paused**.
- **Guests**: walk-ins and day-pass visitors.
- **Ended**.

When a member leaves

A member gives notice from their own app. You see it on their profile and can:

- **Approve**: they leave at the end of the paid period that falls on or after your notice period.
- **Agree an earlier date**: this waives the rest of the notice. Any invoice already sent for after that date is cancelled.
- **Decline.**

You can also end a membership yourself with **End membership**.

Set the notice period in **Settings → Leaving and pausing**.

Pausing

If you turn on **Members can pause** (Settings → Leaving and pausing), members on monthly plans can ask to pause. You approve or decline. While paused, their desk stays theirs, they aren't billed for those days, and their renewal date moves later by the days paused. You set how many pause days a year they get.

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4 Home: who's in today

Home is the first thing you see. From the top:

- **Collected this month**: the money received against this month's invoices, and what share of the month's billing that is.
- **Due this week**: invoices that are overdue or fall due in the next 7 days, longest overdue first. Tap one to open it.
- **Needs you**: anything waiting on you, such as UPI screenshots to check, room requests, agreements to countersign and join requests. It only appears when something is waiting.
- **Today**: who is **In right now**, how many hot desks are in use, and who **Came in today**.

Front desk sees Needs you and Today, without the money. Your accountant sees the money, without Today.

Checking people in

- **Members check themselves in** from their app when they're within about 150 m of your space.
- **You can check someone in**: search by name, company or phone and tap **Check in**.
- Everyone still checked in is checked out when you close.

Overdue invoices. If a member's invoice is overdue by more than the number of days you set, their own check-in is blocked and they see "Please clear your invoice". You can still tap **Check in anyway**; it's noted in the activity log.

Guest pass

For someone who walks in for the day:

1. Tap **Guest pass**.
2. Enter their phone and name.
3. Take cash, or ask for the UPI reference from their payment.
4. Confirm. They're checked in, and a receipt is made.

You need a day price on a hot-desk plan first.

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5 Invoices

How billing works

- Each membership gets one invoice per period. The next one is made a few days before the period starts (you set how many in **Settings → Invoice details → Days ahead**).
- **Paid till** moves forward only when a period's invoice is paid in full.
- An issued invoice is locked. To correct one, issue a credit note; nothing is ever edited or deleted.
- Invoice numbers run in one series and are never skipped or reused.

Record a payment

1. Open the invoice and tap **Record payment**.
2. Choose **Full balance** or **Other amount**.

3. Choose **Paid by**: cash, bank transfer, cheque or UPI. Enter the UTR or reference.
4. Tap **Save payment**.

The member gets a receipt. If they paid more than was due, the extra is kept as an advance and comes off their next invoice.

Credit notes

Open the invoice, tap **Credit note**, choose **All of it** or **Part of it**, and give a reason. Crediting all of it cancels the invoice. If the period still needs billing, tap **Issue again** to make it afresh with a new number.

One-off invoices

For things outside a membership, such as printing or an event: **Invoices → New invoice**. Choose who to bill, add the lines, and tap **Issue and send**, or **Save draft** to finish later. A draft has no number and the member can't see it.

Late fees

In **Settings → Invoice details → Late fee**, choose **Off**, **Fixed** or **Percent**, and how many days after the due date it applies. The fee is added once per invoice, as its own small invoice with tax. You can waive one with a credit note.

For your accountant

Invoices → Export gives you, for any month:

- **GST sales register**, a CSV for GSTR-1
- **Payments received**, a CSV for matching against your bank
- **Invoice PDFs**, a zip of invoices and credit notes

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6 Getting paid

Members can pay in three ways. Every payment, whatever the method, ends up on the invoice in the same way.

Bank transfer or cash

Your bank details show on each invoice. When the money arrives, record the payment yourself (section 5).

UPI with your own QR

1. In **Settings → Payments**, enter your UPI ID and upload your UPI QR.
2. Members tap **Scan to pay** on their invoice, pay from their own UPI app, then send the UTR and a screenshot.
3. You see a banner, **UPI screenshots to check**. Find the UTR in your bank or UPI app. If the money arrived, tap **Approve** and the payment is recorded. If not, **Reject** with a reason the member sees.

Online with Razorpay

Members pay by UPI, card or netbanking, straight into your own Razorpay account. The payment is recorded automatically.

1. In **Settings → Payments**, paste your Razorpay **Key ID** and **Key Secret**. The secret is locked once saved and never shown again.
2. Follow the steps shown to add the webhook in Razorpay.
3. Tap **Run ₹1 test** and pay ₹1 from your own phone. It's refunded automatically. Razorpay then shows as **Live** and members see a **Pay** button.

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7 Bookings

Bookings shows each room's day. Use the date at the top to move between days.

- **Requests** sit at the top if a room needs approval. **Approve** or **Decline**; the person is told either way. A request nobody answers is declined 2 hours before the start.
- Tap a booking to see who booked it, their expected guests, and to **Cancel booking**, **Mark no-show** or **Give the hours back**.
- **New booking** books for a member, or for a walk-in who pays you at the desk by cash or UPI.

Members book from their app. Their plan's free hours are used first; anything beyond goes on their next invoice at the member rate.

Walk-ins book and pay online from your public page at the walk-in rate. An unpaid booking is released after 30 minutes.

Online day passes. In **Settings → Online day passes**, set how many people can buy a day pass online per day. Each holds a hot-desk seat that day. Set it to 0 to turn this off. Buyers can cancel free until the day before.

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8 Reminders and messages

Open **Reminders** (under **More** on a phone).

Invoice reminders

toworkfrom reminds members for you:

When	What
Invoice issued	The invoice, before the period starts
1 day before due	A reminder
10:00 am on the due date	A reminder
3 days late	A reminder
7 days late	A firmer reminder; check-in is blocked from then
Every 7 days after	Until 30 days late
30 days late	Automatic messages stop. It needs you

In **Reminder settings** you can switch each step on or off, choose a **Friendly** or **Firm** tone, add your own line and sign-off, and set **Quiet hours**. Messages wait until quiet hours end. Receipts and booking reminders aren't held back.

From any overdue invoice you can tap **Remind now**, and from Invoices, **Remind all overdue**.

Messages

The **Messages** tab lists every message sent, with whether it was delivered and read. **Needs you** lists invoices more than 30 days late.

Your morning summary

At 9 am you get one email with what needs you that day: money due, overdue invoices, UPI screenshots to check, room requests, agreements to countersign and join requests. It's skipped on days with nothing to report.

Announcements

Send one short message a day, up to 300 characters, to **Everyone**, those **In today**, or the people on **A plan**. Announcements go by email and app notification.

The welcome message

In **Settings → Welcome message**, add your Wi-Fi name and password, house rules and front desk phone. New members get these by email when their membership starts.

WhatsApp

Messages can come from your own WhatsApp Business number, with your name on them. Open **Settings → WhatsApp → Set up WhatsApp** and follow the steps on that screen. In short:

1. Have a number that isn't already on WhatsApp.
2. Create an app on Meta's developer site and add your number.
3. Copy four things from Meta and paste them into toworkfrom, then tap **Connect WhatsApp**. The token and app secret are locked and never shown again.
4. Add the webhook in your Meta app, using the two values toworkfrom shows you.
5. Publish your Meta app.

Meta then reviews each message, usually within a day. The screen shows how many are approved. Until a message is approved, it goes by email and app notification only. Once approved, members get it on WhatsApp and by email.

Members choose English or Hindi for their WhatsApp messages in their own app. They need a phone number on their profile.

9 Agreements

Open **Agreements** (under **More** on a phone).

Templates

A template is your own agreement wording. Tap **Start from toworkfrom's template** to get a coworking licence agreement to edit, or **New template** to paste your own.

In the wording, fields in curly brackets fill in for each member: for example `{member_name}`, `{start_date}`, `{monthly_total}`. Tap a field to insert it. Start a line with `#` for a heading or `1.` for a numbered clause.

toworkfrom's template is a starting point, not legal advice. Have your lawyer read it once.

Send an agreement

1. Tap **New agreement**, choose the member or company, and the template.
2. Tap **Prepare agreement**. The fields fill in from their membership. You can change any of them, and the dates, for this agreement only.
3. If you bought e-stamp paper for it (India), tap **Attach e-stamp certificate**. It becomes page 1 of the PDF. This can only be done before sending.
4. Tap **Open PDF** to check it, then **Send for signing**.

The signer gets an email with a link that works for 14 days, and the same link on WhatsApp if your number is connected. For a company, the signer is its billing contact. If they haven't signed, they're reminded 2 and 5 days later. You can **Send the link again** at any time.

How they sign

On the page the link opens, with no app needed, the signer:

1. reads to the end
2. types their full name and draws their signature
3. confirms with a 6-digit code sent to their email

They can also decline, with a reason. You get an email either way.

Countersign

When the status is **Member signed**, open the agreement and tap **Countersign**. The first time, you draw your signature; it's saved, and after that it's one tap.

The agreement becomes **Active** and is locked: nothing in it can change. You and the signer each get the signed PDF by email, and the signer is told on WhatsApp. Its last page is a signing certificate with the signer's name, verified email, time, IP address, device, and a fingerprint of the text.

Statuses

Status	Meaning
Draft	Being prepared; the member can't see it
Sent / Viewed	Waiting for the signer
Member signed	Waiting for you to countersign
Active	Signed by both, and locked
Ending soon	30 days or less to the end date
Replaced	A newer version is active
Link expired	The 14 days ran out; send it again
Declined	The signer declined; prepare a new one

Renewing

- **30 days before an agreement ends**, you get an email, and it shows as **Ending soon**.
- Open it and tap **Renew**. The next version is prepared for you: it starts the day after this one ends, runs for the template's term, and uses today's prices.
- **Changes from the last version** shows what's different, side by side. Check it, change anything you need to, then **Send for signing**.
- **15 days before the end**, the signer is told their agreement is ending, unless the renewal has already reached them.

To change an active agreement, prepare a new one for the same membership. It becomes the next version and replaces the old one once both of you have signed it.

A membership keeps running, and invoices continue, whether or not an agreement is signed.

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10 Staff and what they can do

Invite someone

1. Open **Staff** (under **More** on a phone) and tap **Invite staff**.
2. Enter their name and email, and choose a role.
3. Tap **Send invite**.

They get an email, and log in with a 6-digit code sent to that address. The invite works for 7 days; if it runs out, open them and tap **Send invite again**.

An email that already belongs to a member can't be used for staff. One person has one role.

Roles

Role	Can do
Owner, co-owner	Everything
Manager	Check-in and guest passes, members and memberships, bookings, invoices and recording payments, checking UPI screenshots, preparing agreements, announcements. Sees plans and reminder settings but can't change them. No credit notes, exports or payment settings
Front desk	Check-in and guest passes, bookings, checking UPI screenshots, viewing invoices and recording payments. Sees members' names, phones and emails only
Accountant	Invoices, exports, members' billing details, viewing plans and agreements. Doesn't see members' phones or emails

What staff see

Each person sees only what their role can use. Front desk gets Home, Members, Invoices and Bookings. The accountant gets Members, Invoices, Plans and Agreements to read. A manager gets everything except Staff and your settings. Settings for the space itself are yours and your co-owner's.

A change to someone's role or switches shows on their side the next time they open the app.

Switches

A few things can be turned on or off for one person. Open them in **Staff** to change these.

- **Manager:** give special prices (off), countersign agreements (off), send announcements (on).
- **Front desk:** see invoices (on), record cash, bank and cheque payments (on).
- **Accountant:** issue credit notes and waive late fees (on).

Devices

Open someone in **Staff** to see the devices they're signed in on, when each was first seen and when it was last used. The Staff list shows when each person was last active.

When a staff member signs in on a device not seen before, you get an email naming the person and the device. If it isn't expected, remove them: that signs them out everywhere at once.

Change or remove someone

Open them in **Staff** to change their name, role or switches. **Remove** takes effect at once: they're logged out everywhere and can't open your space. What they did stays in the history under their name. You can invite them again later.

Passing on ownership

Each account has one owner, who holds the toworkfrom licence and its billing and can't be removed. To hand that to someone else:

1. Make them a **co-owner** in **Staff**, and wait until they've logged in.
2. Open them in **Staff** and tap **Ask … to become the owner**, then tap again to confirm.

3. They get an email, and a request appears at the top of their **Staff** screen. They tap **Accept ownership**.

Nothing changes until they accept. When they do, they become the owner and you become a co-owner, with full access to the space but not the licence. They have 7 days to answer, and you can cancel the request before then.

The activity log

Open **Activity** (under **More** on a phone) to see who did what, when and from which device: payments recorded, credit notes, price changes, documents opened, staff changes, exports and more. Search by a person's name, or filter by Money, Members, Bookings, Agreements and documents, Staff or Settings.

Nobody can change or delete an entry, including you. Someone you've removed still shows by name, marked "former staff". Only you and a co-owner can see the log.

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11 Your licence

Every account starts with a **35-day free trial**, with no card needed. To keep going, buy a licence.

Buying it

1. Log in to toworkfrom **on the web** (not the phone app) and open **Settings → Licence**.
2. Tap **Buy licence**. Paddle's secure checkout opens. Paddle sells toworkfrom for us: it takes the card, adds GST or VAT where it applies, and emails you the tax invoice.
3. When the payment goes through, your licence is active within a minute. The year starts when you pay.

The iPhone and Android apps only say "Your licence is managed on the web". That's an App Store and Play Store rule, not a mistake.

Prices

One space is $499 a year, or ₹24,999 in India, before tax. The launch offer makes your first year $299 (₹14,999 in India) if you buy by 31 March 2027.

Not happy? You can have a full refund within 14 days of paying, for the first year or any renewal. Reply to Paddle's receipt email, or write to us.

Renewing, your card and invoices

Your licence renews automatically each year. In **Settings → Licence** on the web, **Manage card, invoices and renewal** opens Paddle's own page, where you can change the card, download invoices or turn automatic renewal off. You get reminder emails 30, 7 and 1 day before it renews or ends.

Your data

Settings → Your data → Export everything gives you one zip with your people, companies, memberships, invoices, payments, bookings and every agreement as a PDF. It works at any time, even if the licence has run out. Monthly invoice PDFs are under **Invoices → Export**.

If it runs out

You have **7 days** in which everything still works, with a red "Renew by ..." banner. After that toworkfrom becomes **view-only** for you and your staff: you can still see and export everything and record payments on existing invoices, and members can still pay. Invoices and reminders keep going out for another 30 days, then stop. Buying again brings everything back at once.

A year after it ends, your data is deleted for good: members, invoices, payments, bookings, agreements, documents and the activity log. You get warning emails 30, 7 and 1 day before, and your members get one email 30 days before so they can download their own invoices and agreements. Export everything first if you want a copy, and keep your tax records yourself. Renewing at any point before then stops it.

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12 Not ready yet

- Online payments with Stripe, for spaces outside India
- Sign-in codes by phone