

# BSPK



# BSPK APP TRAINING

Everything you need to know about  
the BSPK app

# TABLE OF CONTENTS

Download App & setup.....Page 5

Home screen.....Page 8

My profile.....Page 9

Create a client profile.....Page 14

Inside a client profile.....Page 15

Create a client list.....Page 16

Create an ideabook post.....Page 17

Create an appointment.....Page 19

Create a reminder.....Page 21

Send a chat.....Page 22

Insights.....Page 25

Create a slice.....Page 26

Collection screen.....Page 28

Contact support.....Page 29

## HOW TO: BSPK APP

Welcome to BSPK. We are thrilled that you are part of the BSPK family and are excited to have you join. In this guide you learn how to use the BSPK app, along with some best practices. Please do not hesitate to reach out with any questions!

You can find links to video tutorials on the table of contents.



**Alexis Dulin**

**ONBOARDING QUESTIONS**

[alexis.dulin@bspk.com](mailto:alexis.dulin@bspk.com)

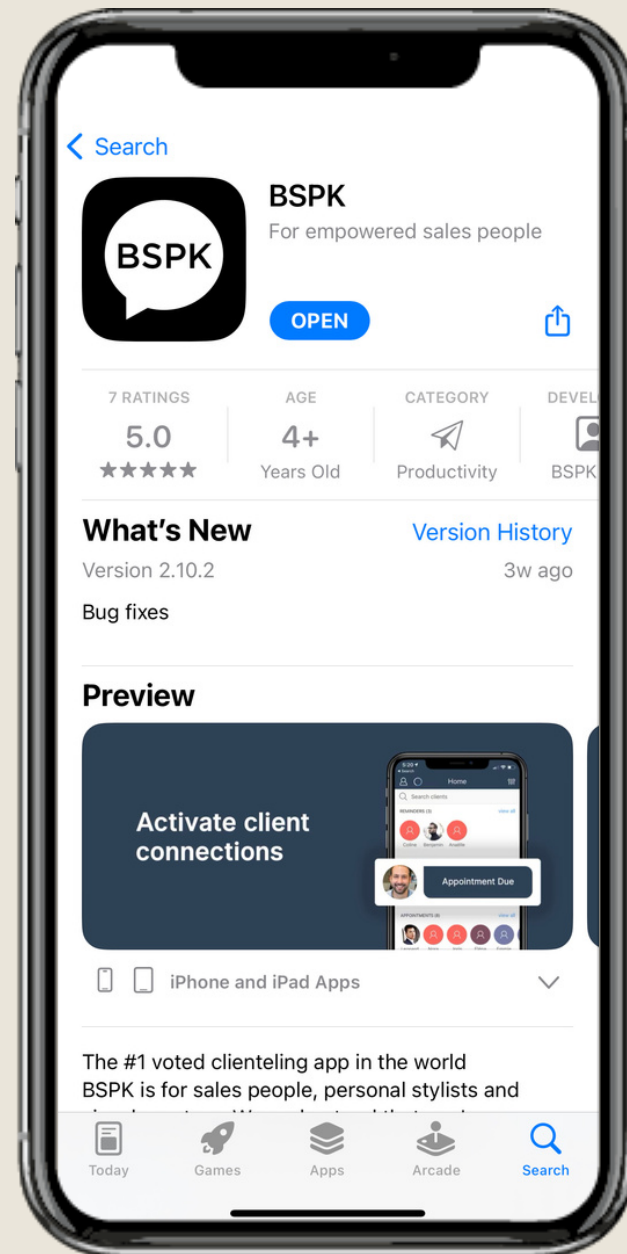
## QUICK START: CHECK LIST

1. Download the BSPK iOS app from the App store
2. Sign in with your mobile phone number
3. Sync your phone contacts to the BSPK mobile app, manually add client profiles, or import client list via admin (enterprise)
4. Send your first message and start your clienteling journey

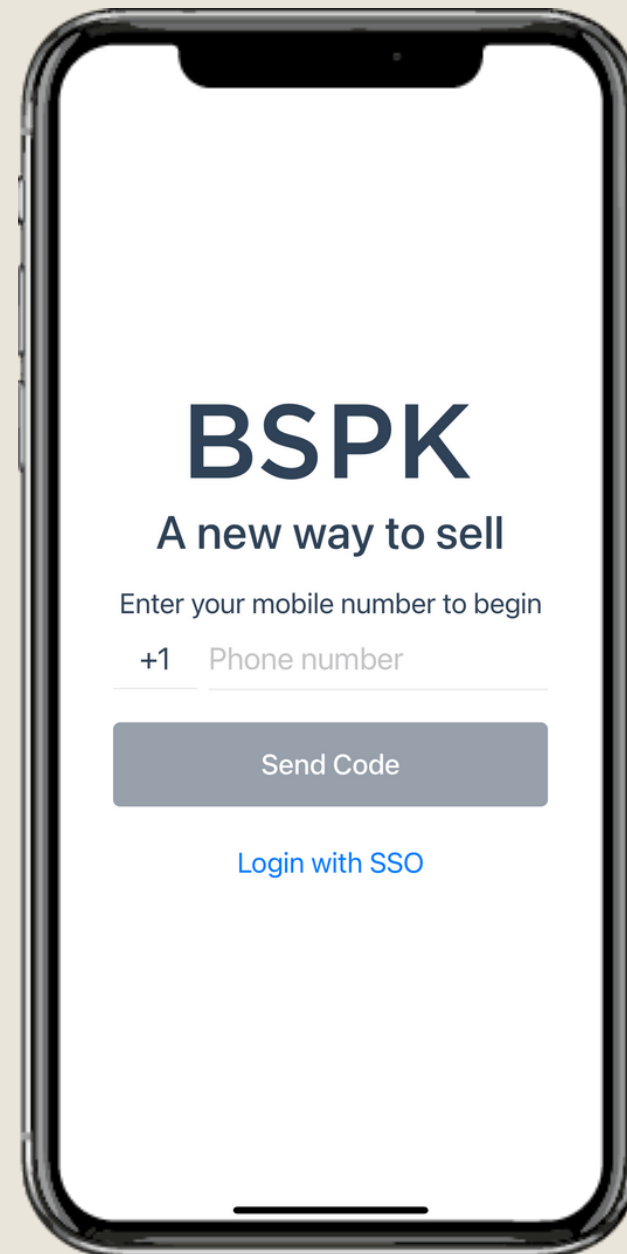


# DOWNLOAD & SET UP

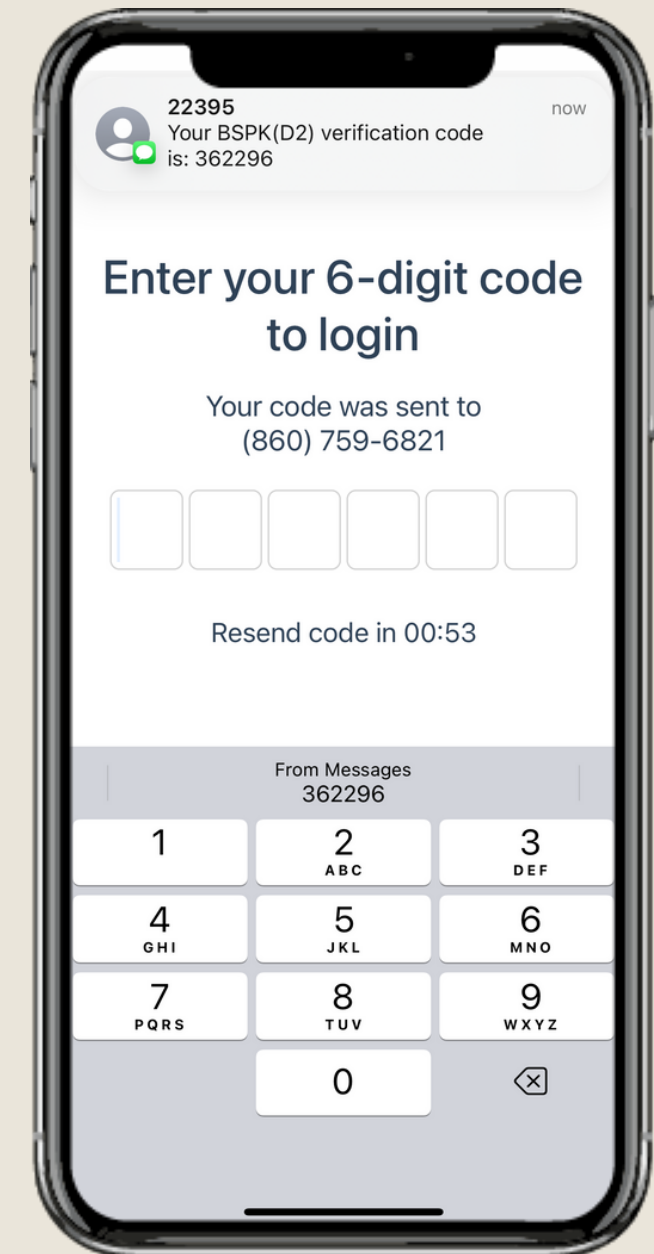
# BSPK



Download the iOS app on your iPhone from the App Store [here](#)



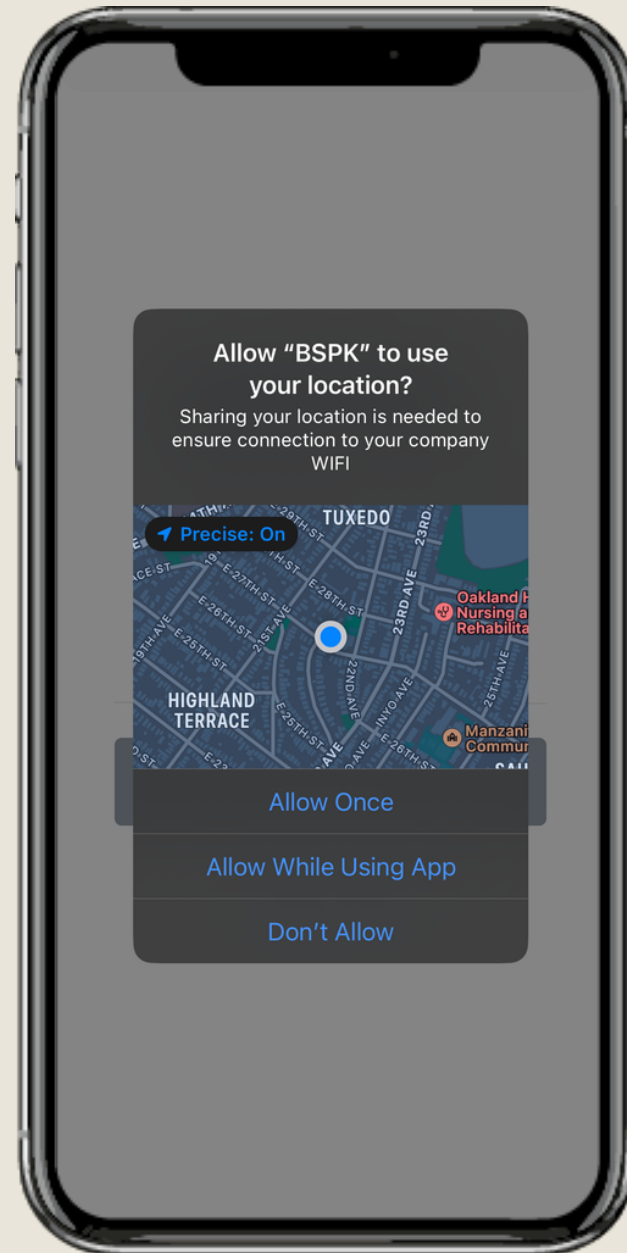
When you open the app, you will be prompted to enter your phone number



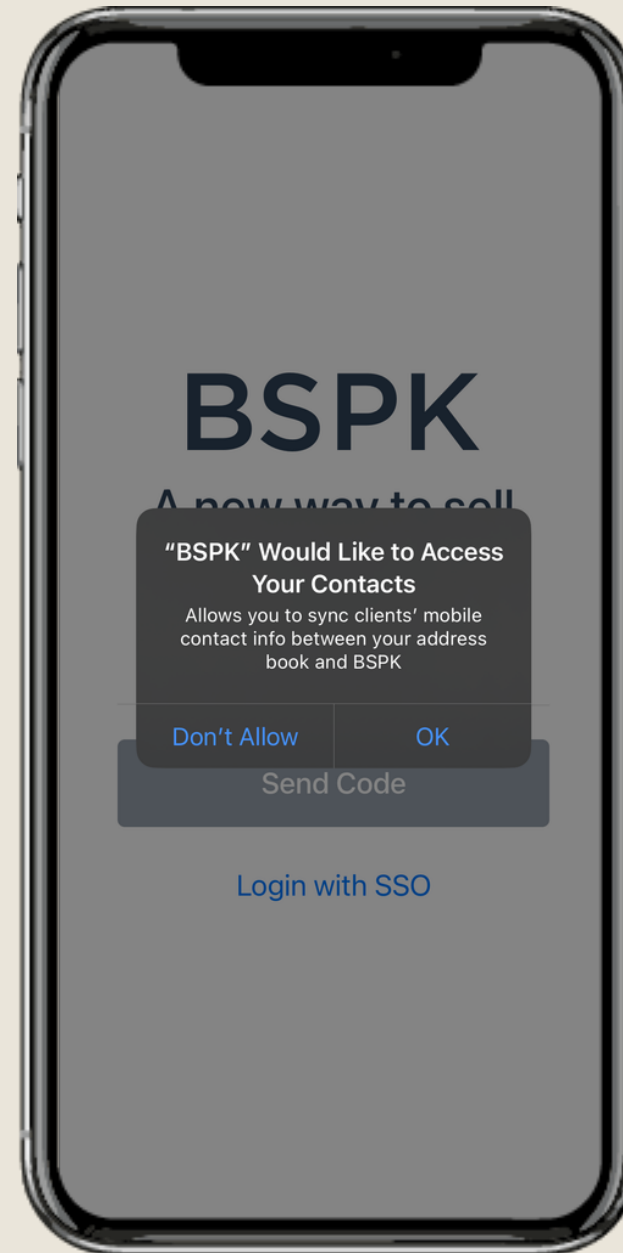
Enter the 6-digit code sent to your phone.

# DOWNLOAD & SET UP

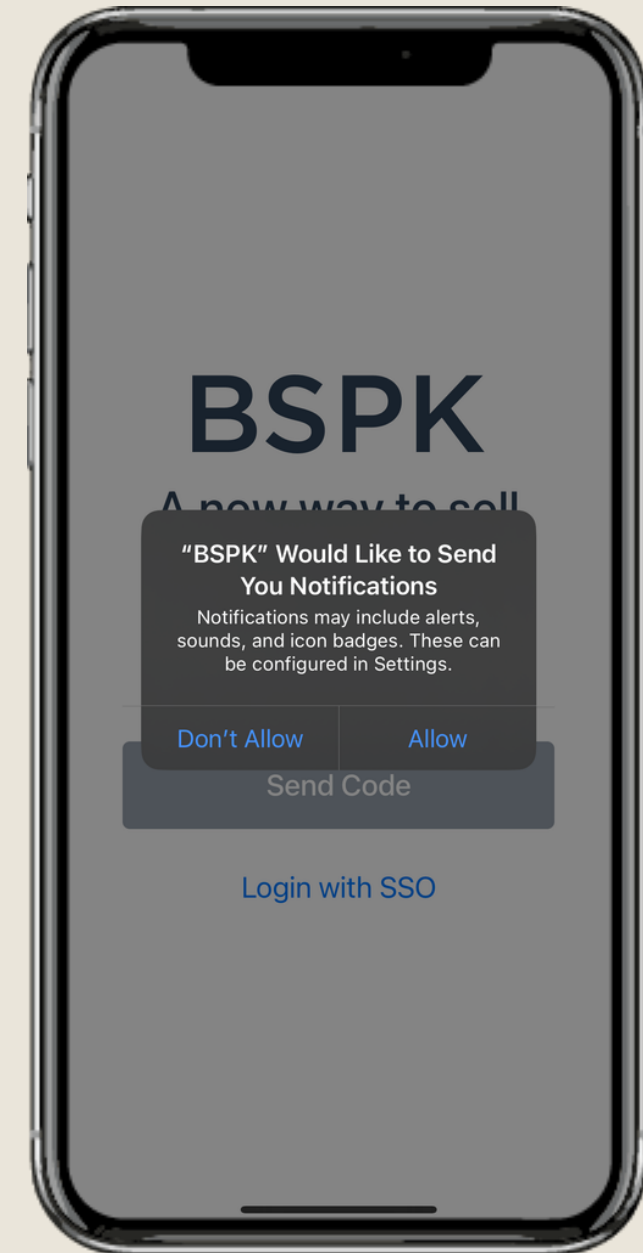
# BSPK



**Location:** Choose "Allow while using app"



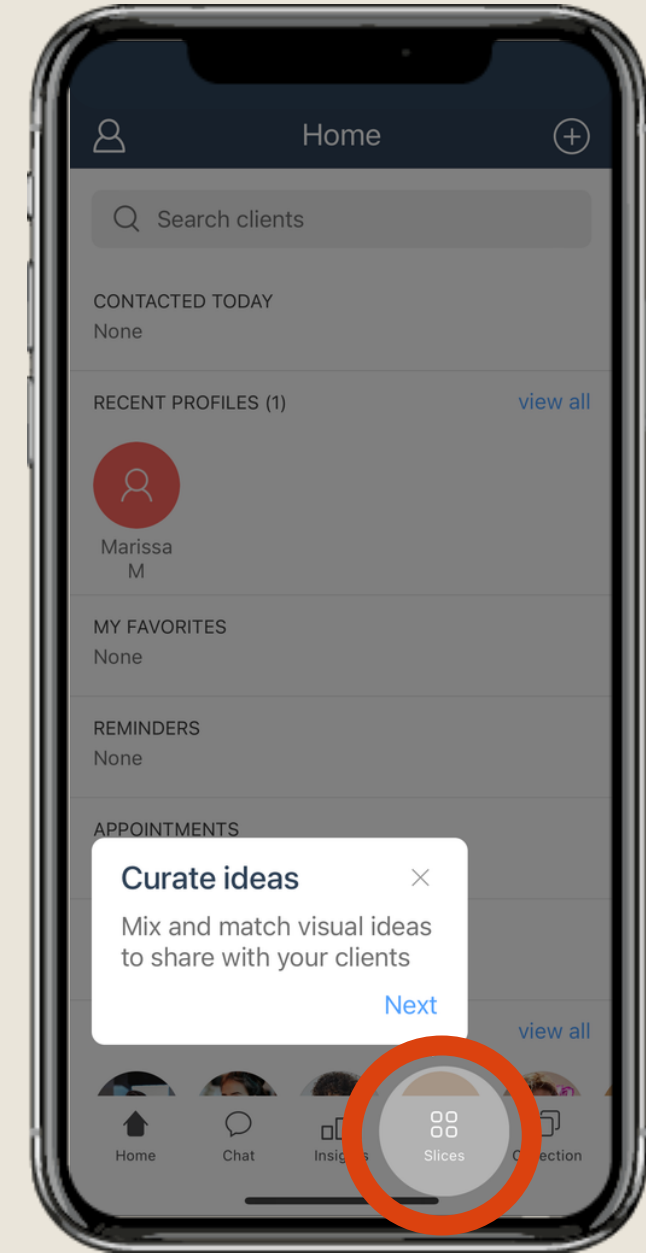
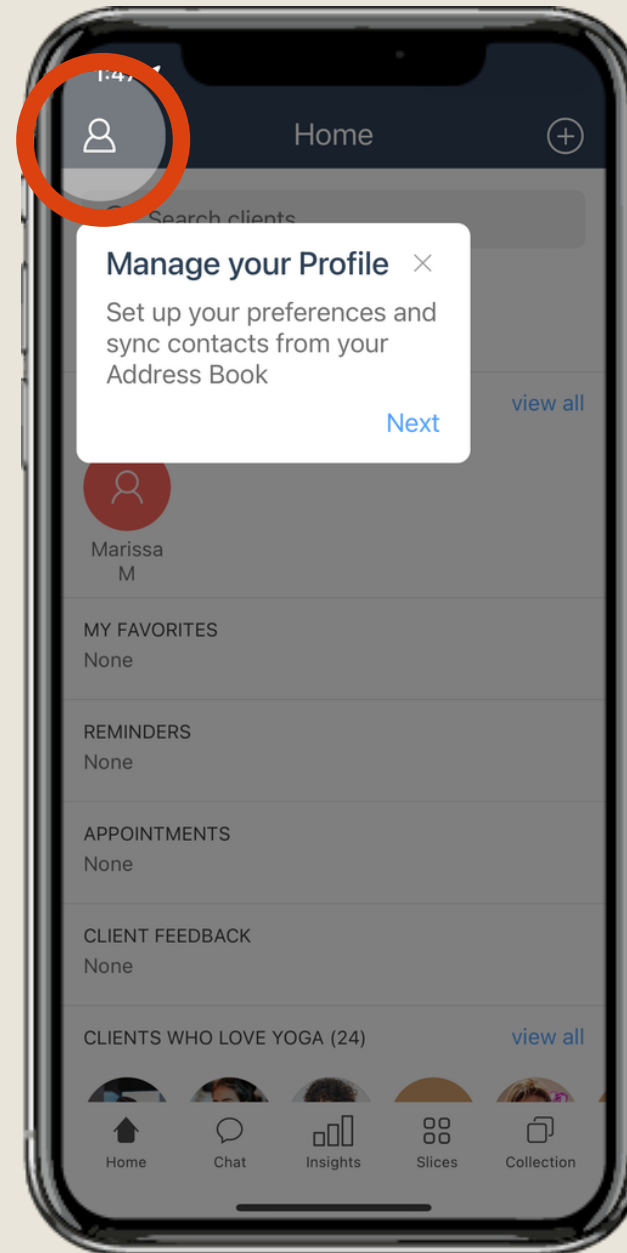
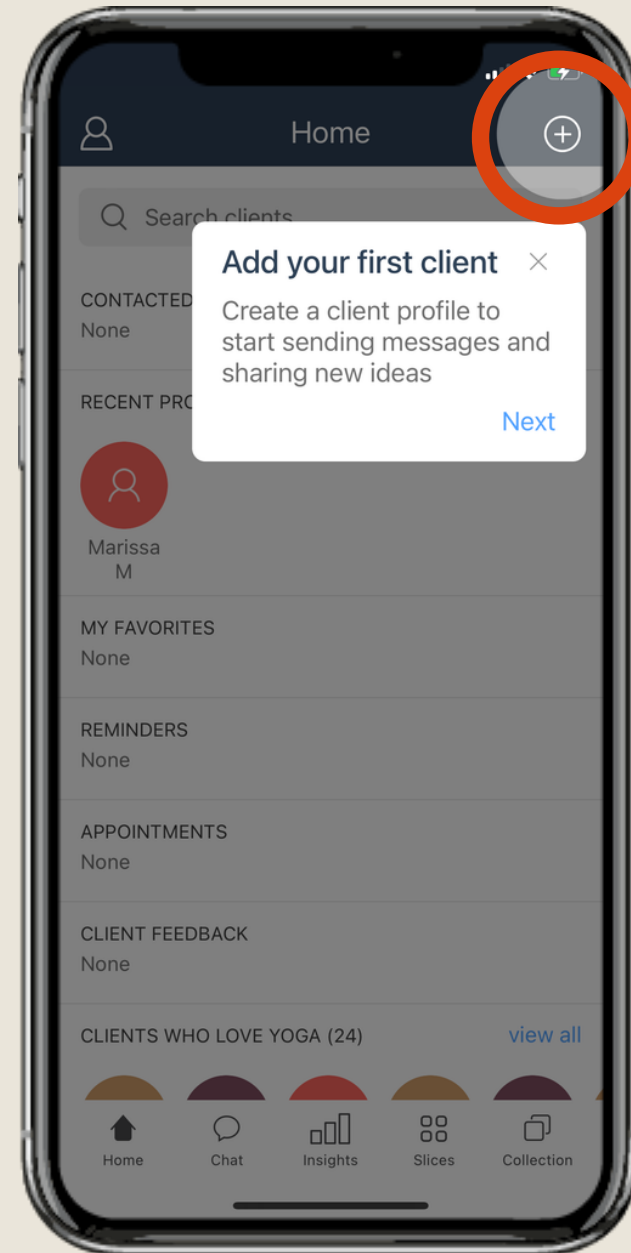
**Contacts:** Choose "OK" for BSPK to access your contacts



**Notifications:** Choose "OK" to receive notifications

# DOWNLOAD & SET UP

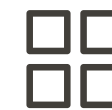
# BSPK



Create a client profile with contact information and other important details



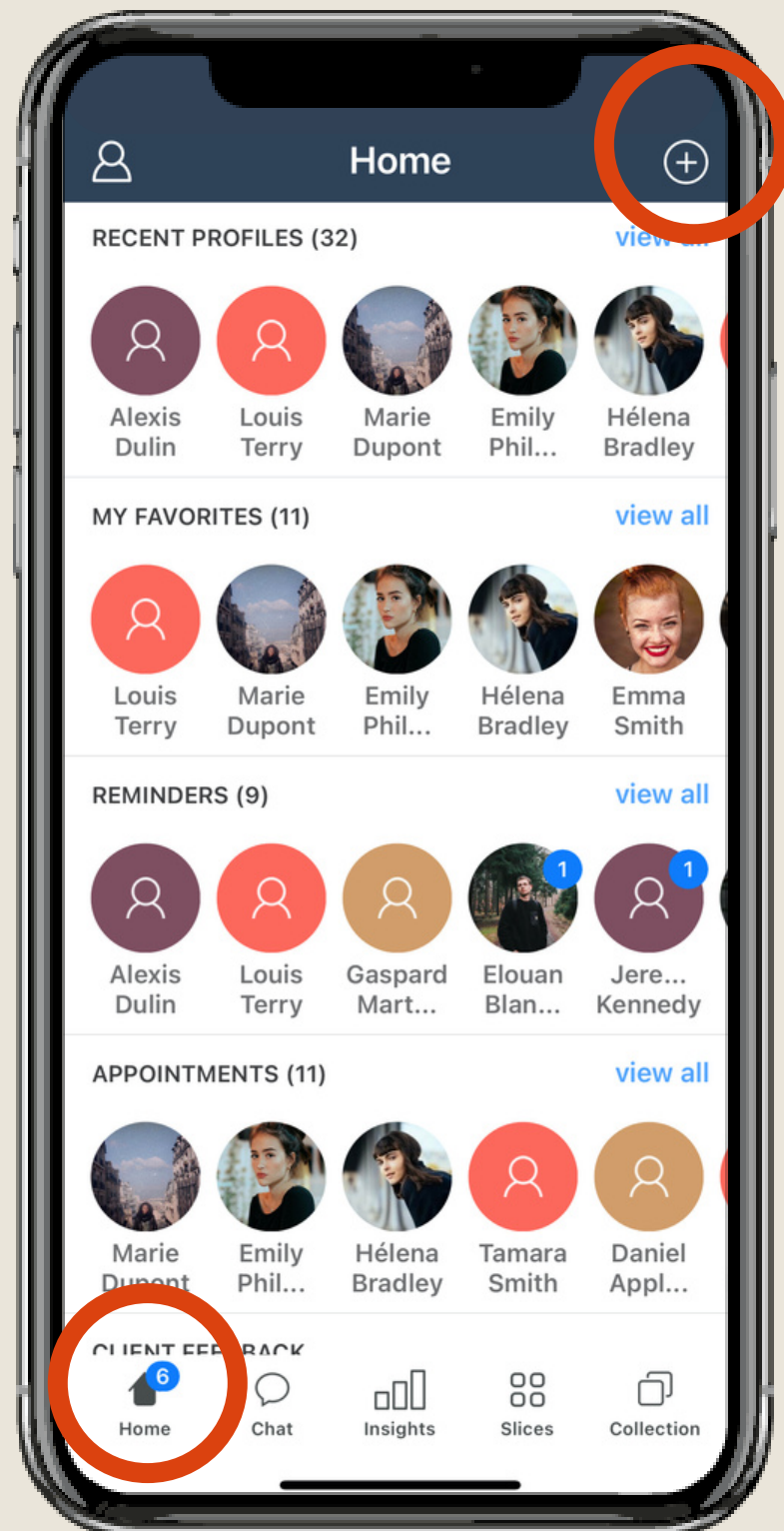
Manage your profile, set up your availability, and sync your contacts



Create a slice to curate your own ideas and share with your clients

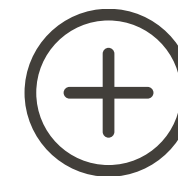
# HOME SCREEN

# BSPK



The home screen will show you items like recent contacts, favorites, appointments, etc. all on one screen so you can easily navigate to them.

The home screen will also show you lists that you create based on different segmentations.



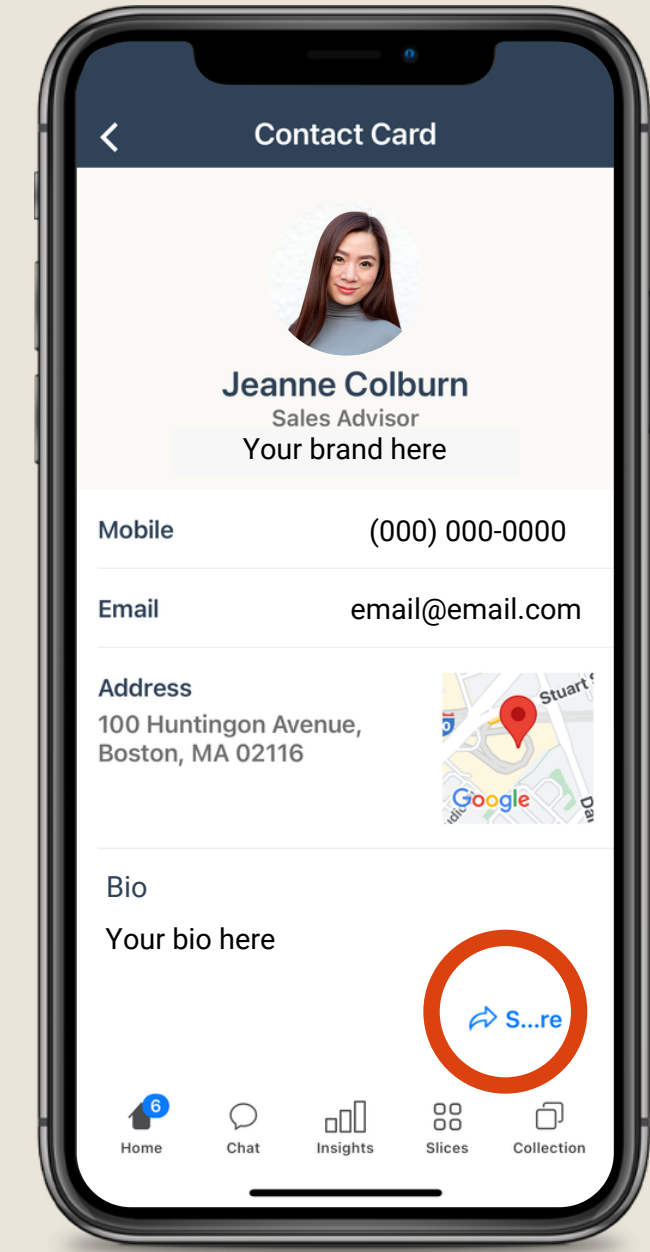
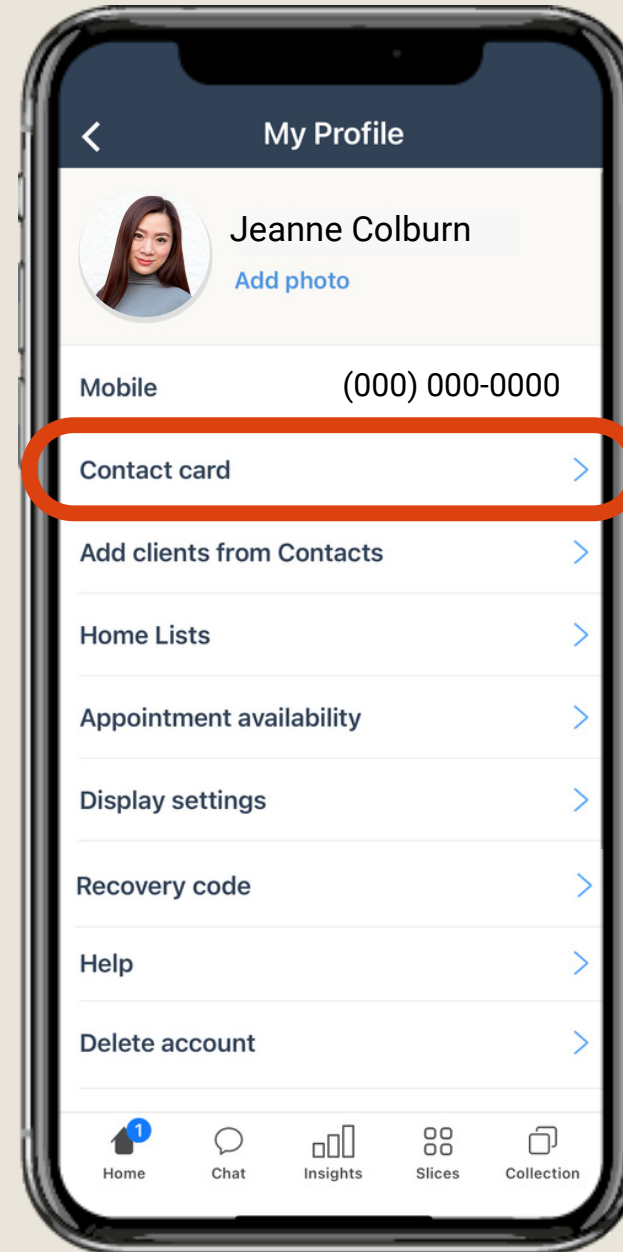
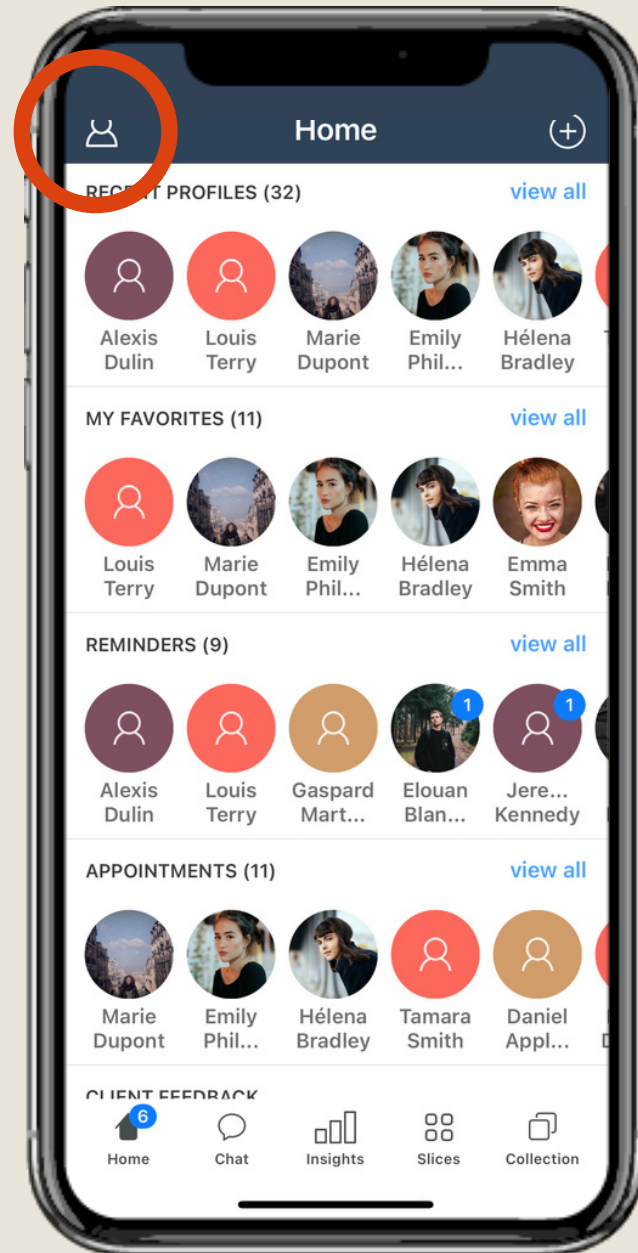
Use the plus button to access:

- Client Profile
- Client List
- Ideabook Post
- Appointment
- Reminder



# MY PROFILE

# BSPK



Tap the profile icon to edit your BSPK profile.



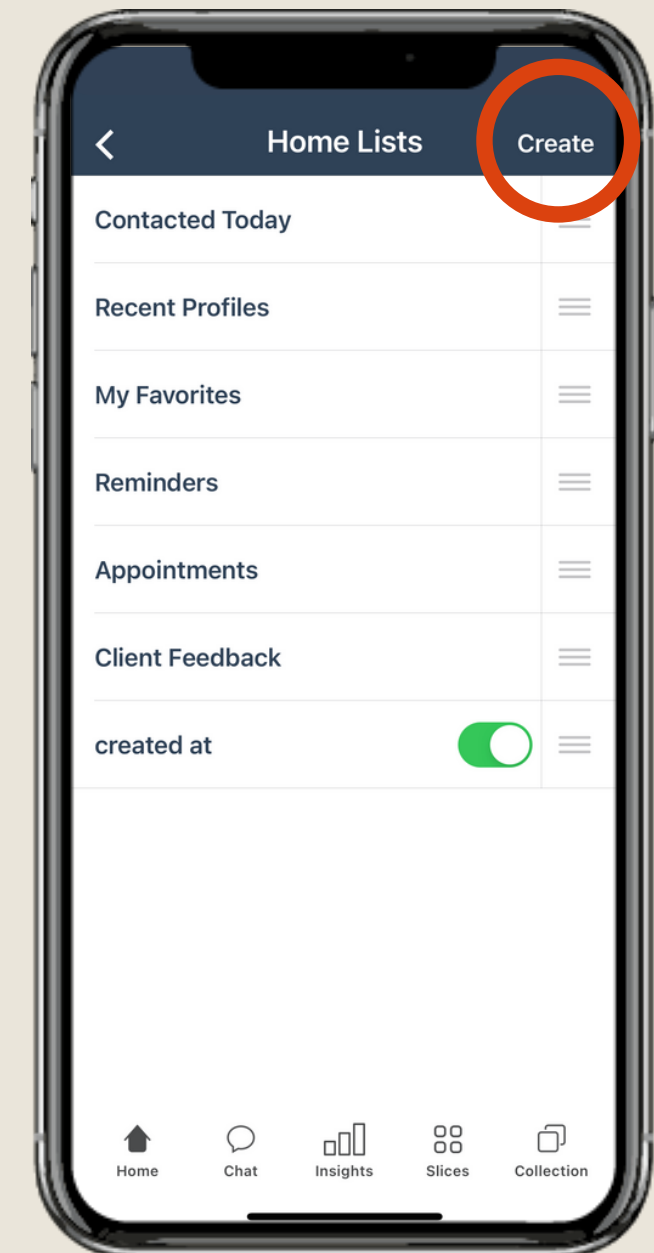
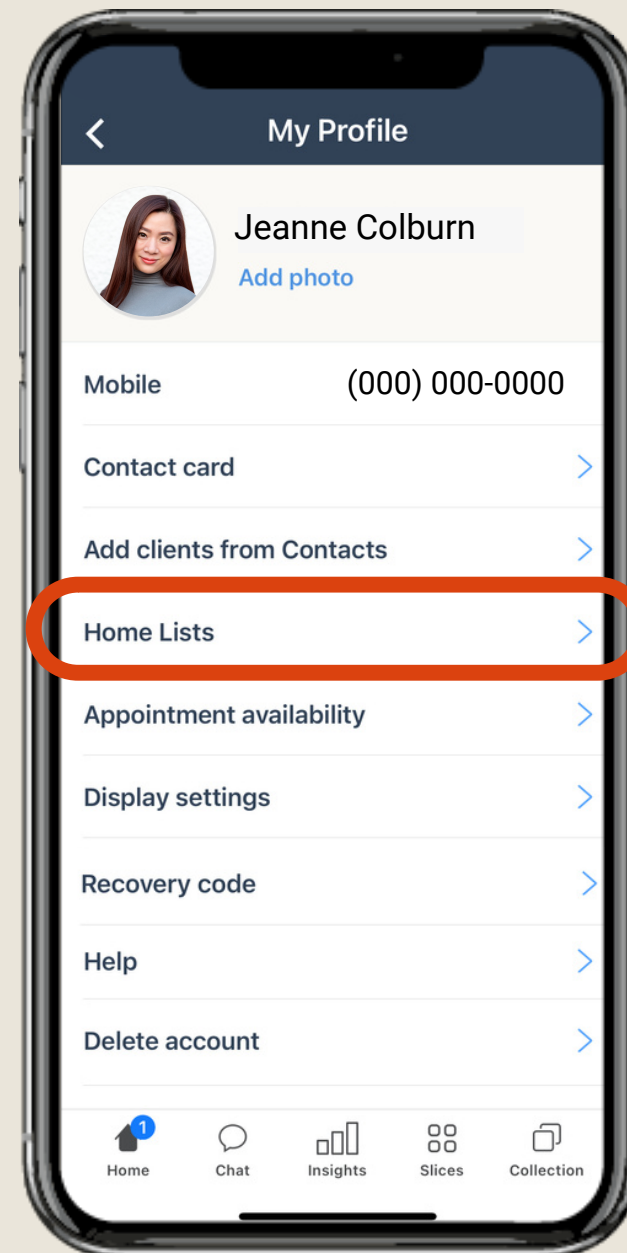
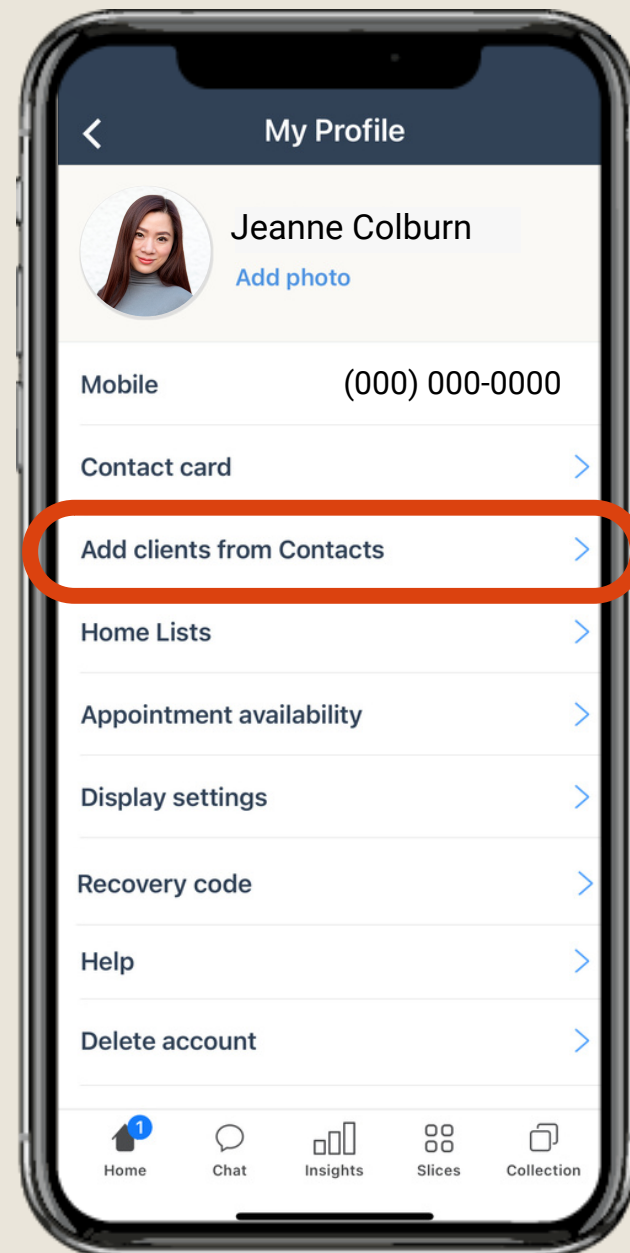
Use the contact card to share with clients



Easily share via SMS, WeChat, WhatsApp, and more

# MY PROFILE- CONTACTS & LISTS

BSPK



Sync and add clients from your phone contacts.



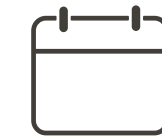
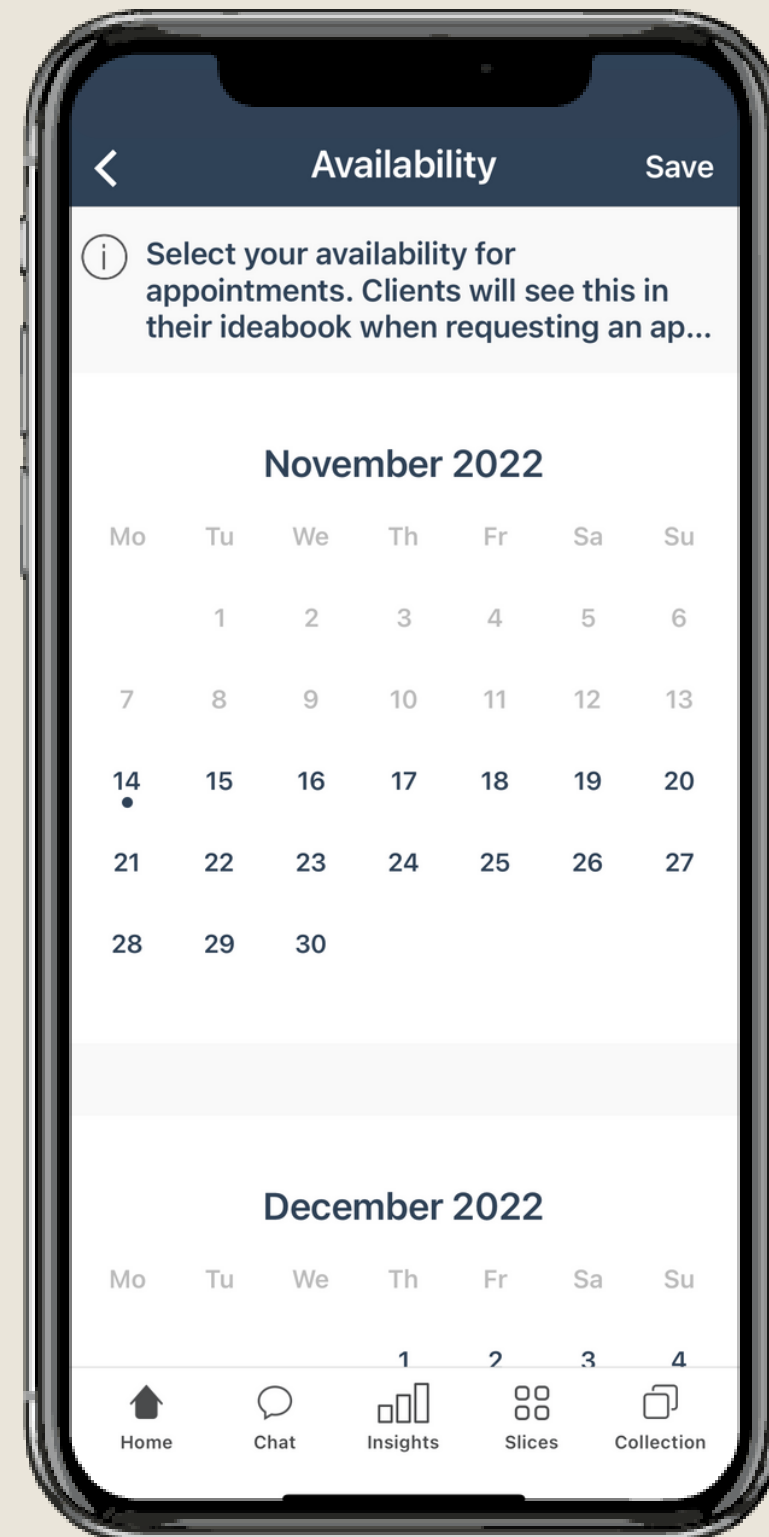
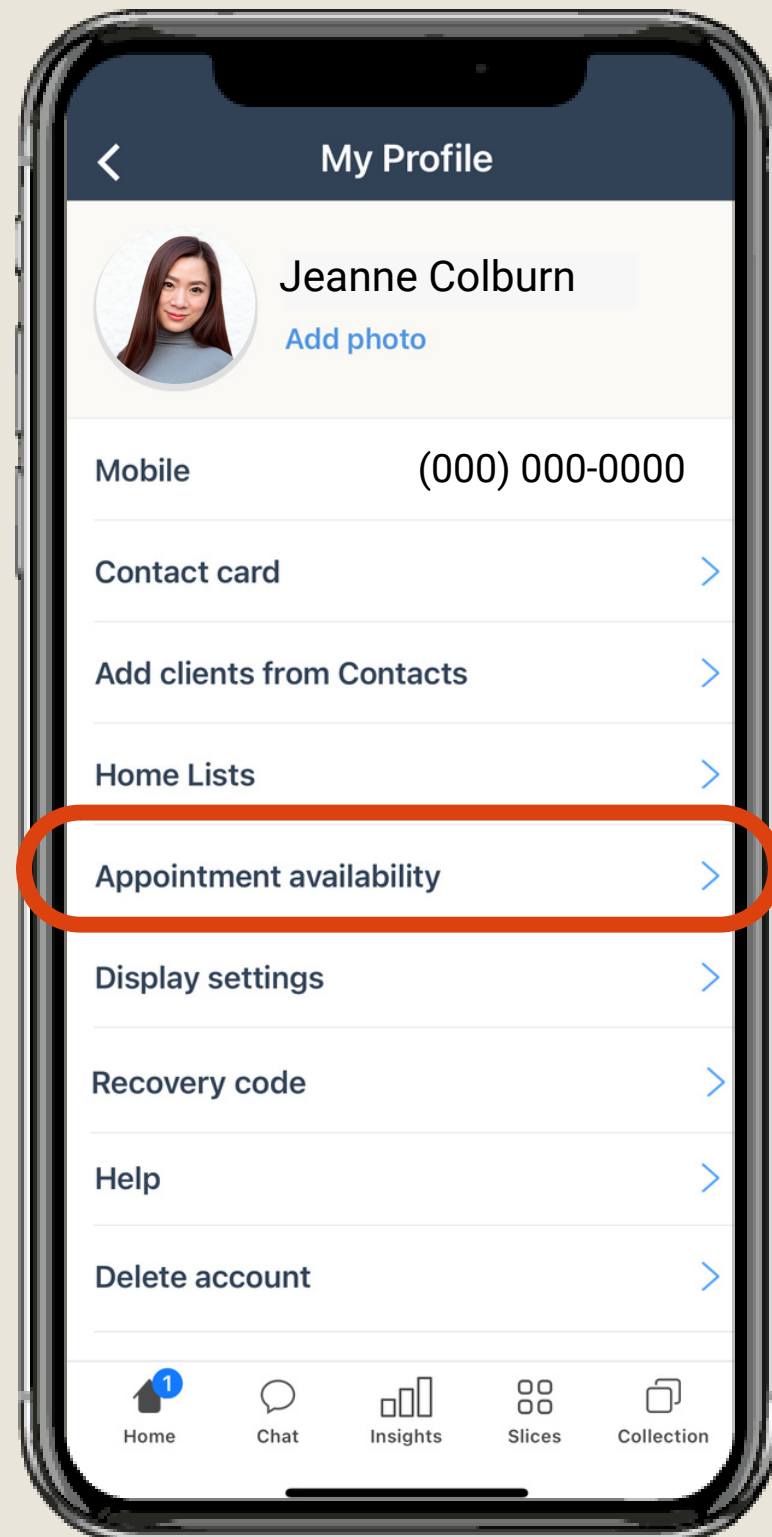
View and create client lists that are displayed on the home screen.



Create new client lists and organize your current ones.

# MY PROFILE - APPOINTMENT AVAILABILITY

# BSPK

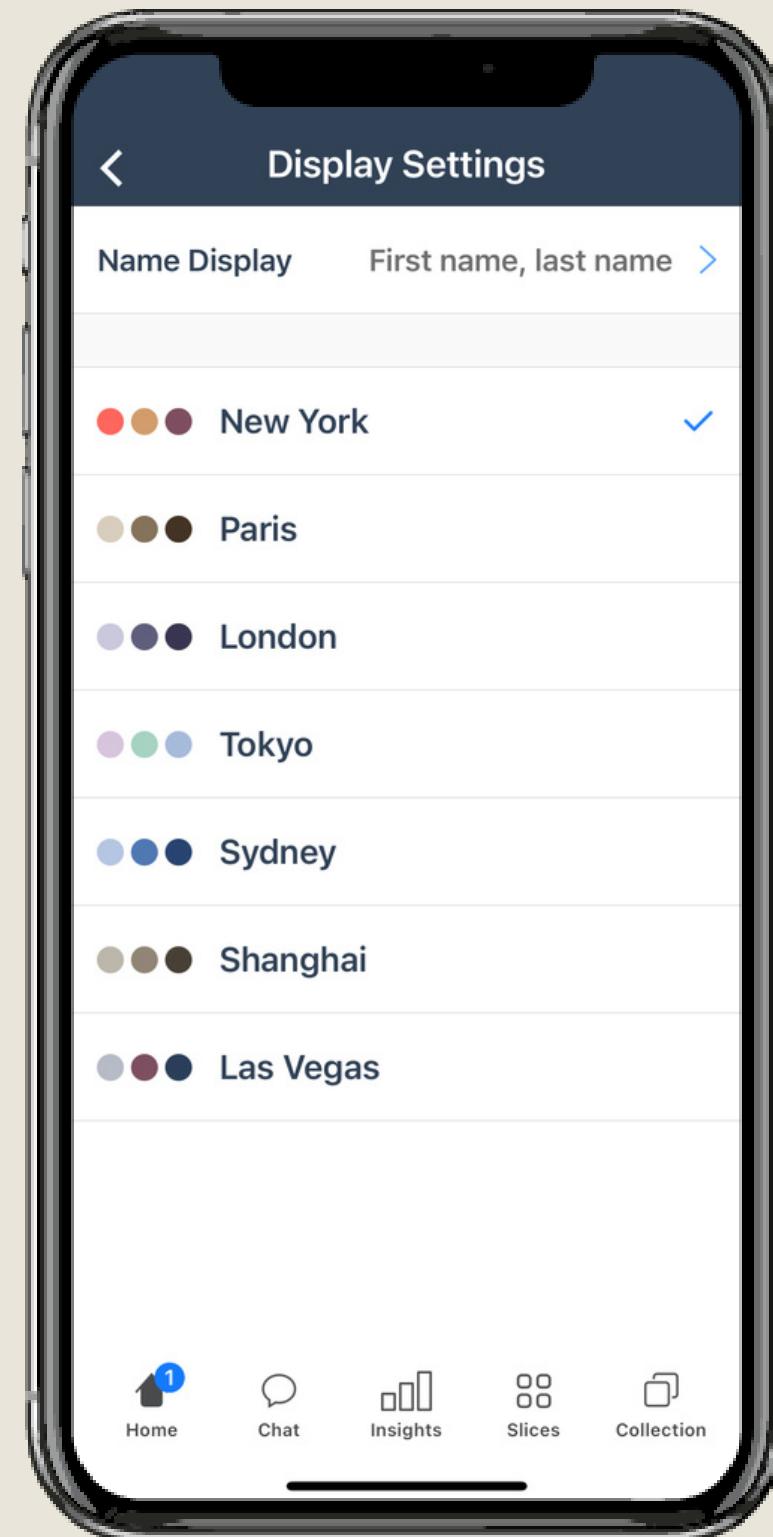
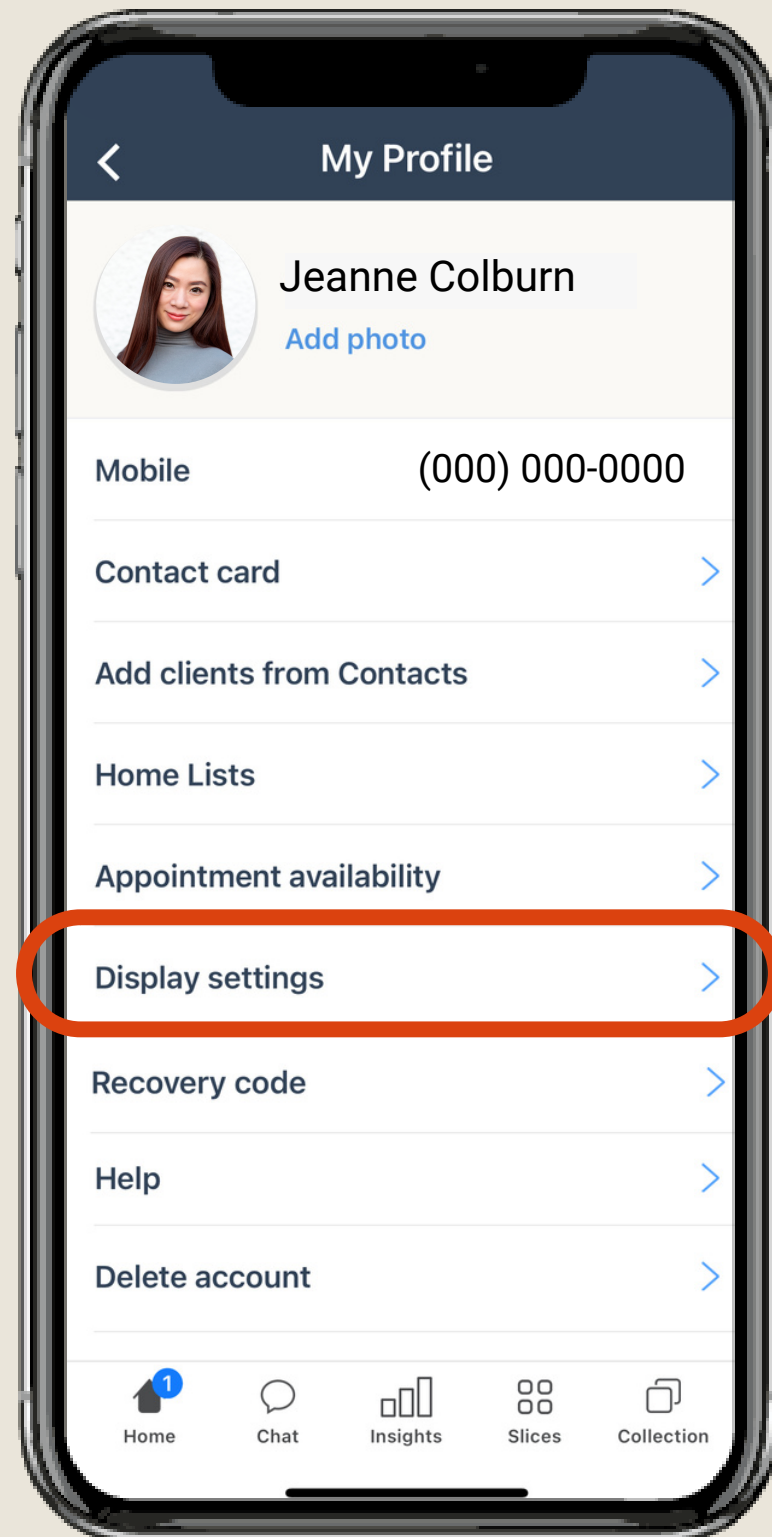


Tap Appointment availability and select your time availability to meet with your clients.

Clients will be able to see this in their personal ideabook and they can request appointments themselves.

# MY PROFILE - DISPLAY SETTINGS

BSPK



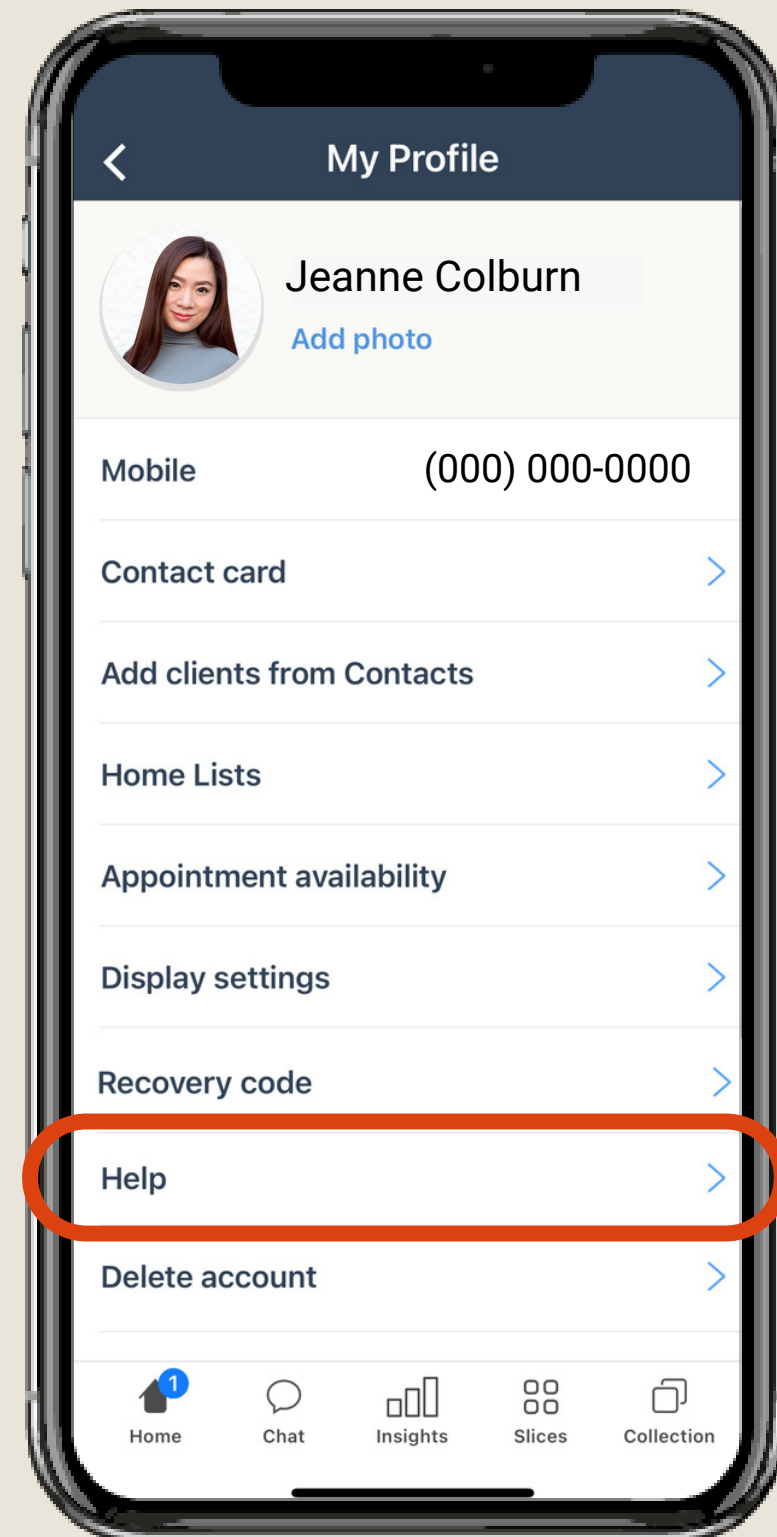
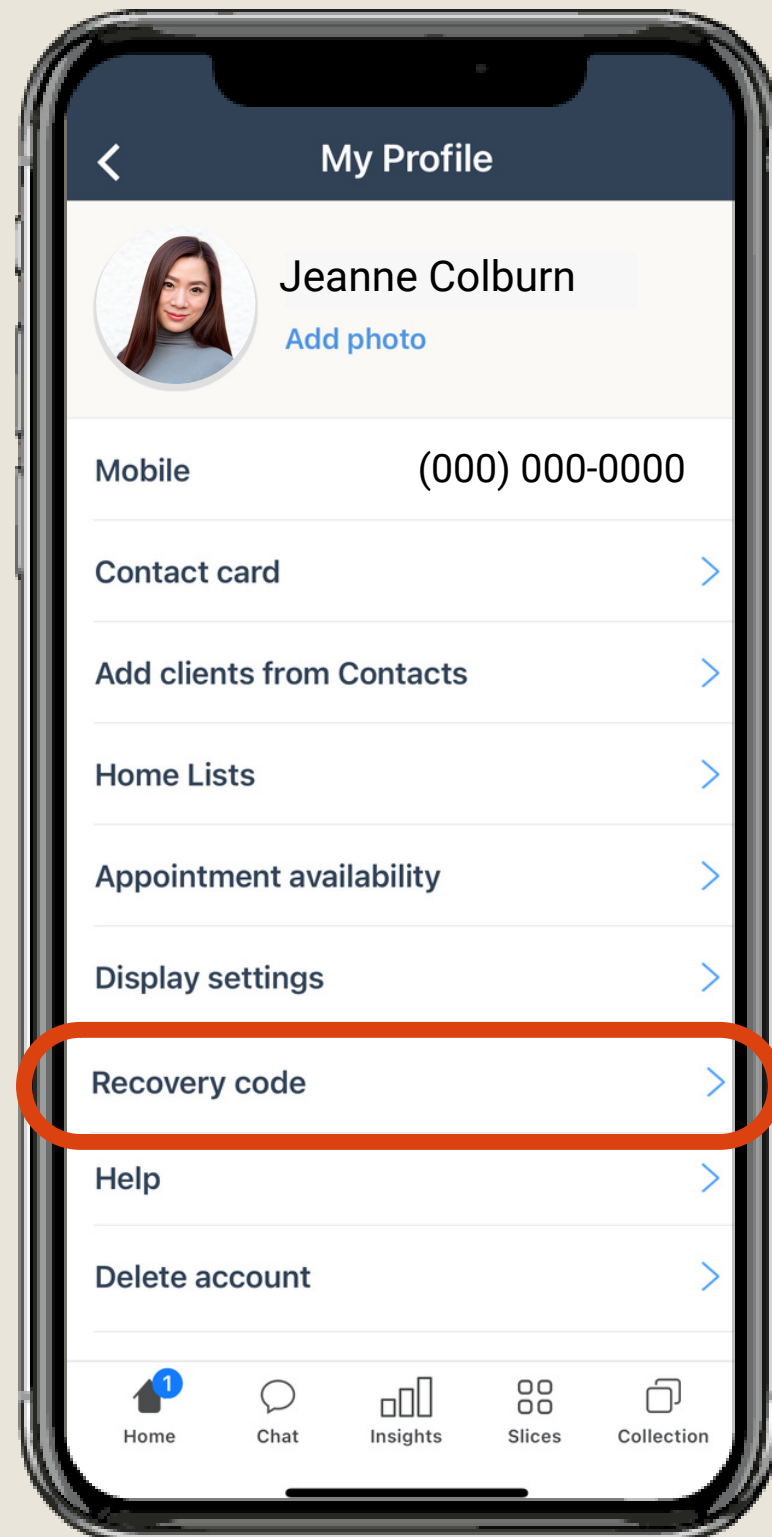
● ● ●

Choose amongst a list of different theme colors in the app.

Choose how you want client names to be displayed.

# MY PROFILE - RECOVERY CODE & HELP

# BSPK



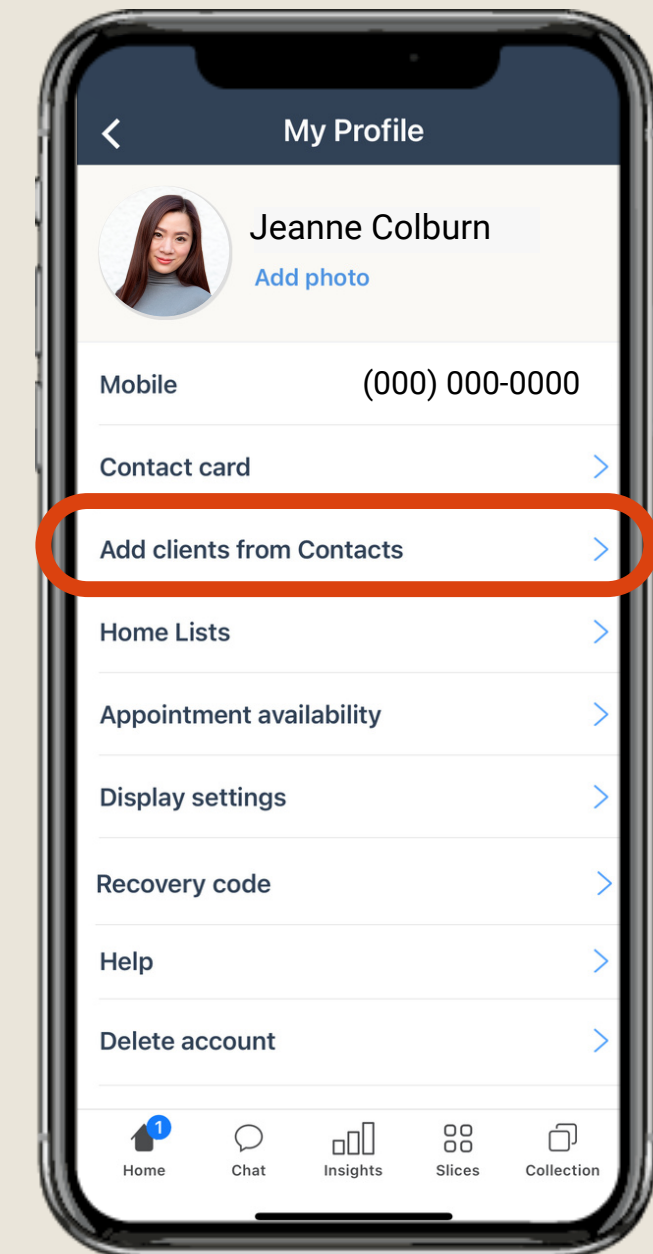
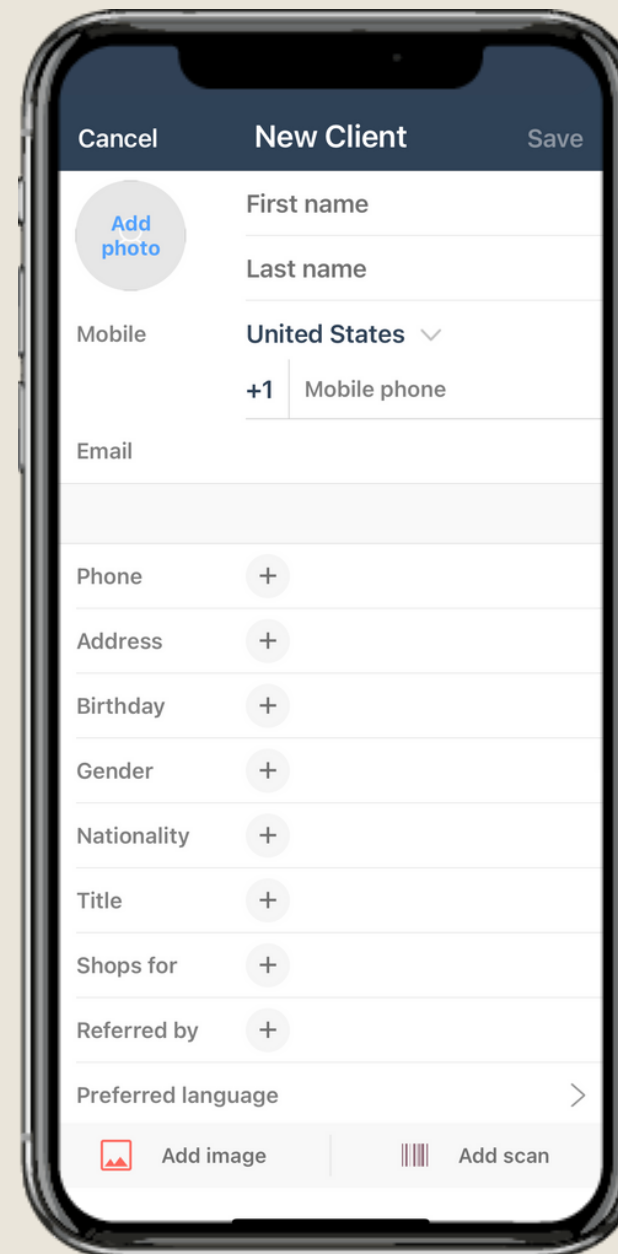
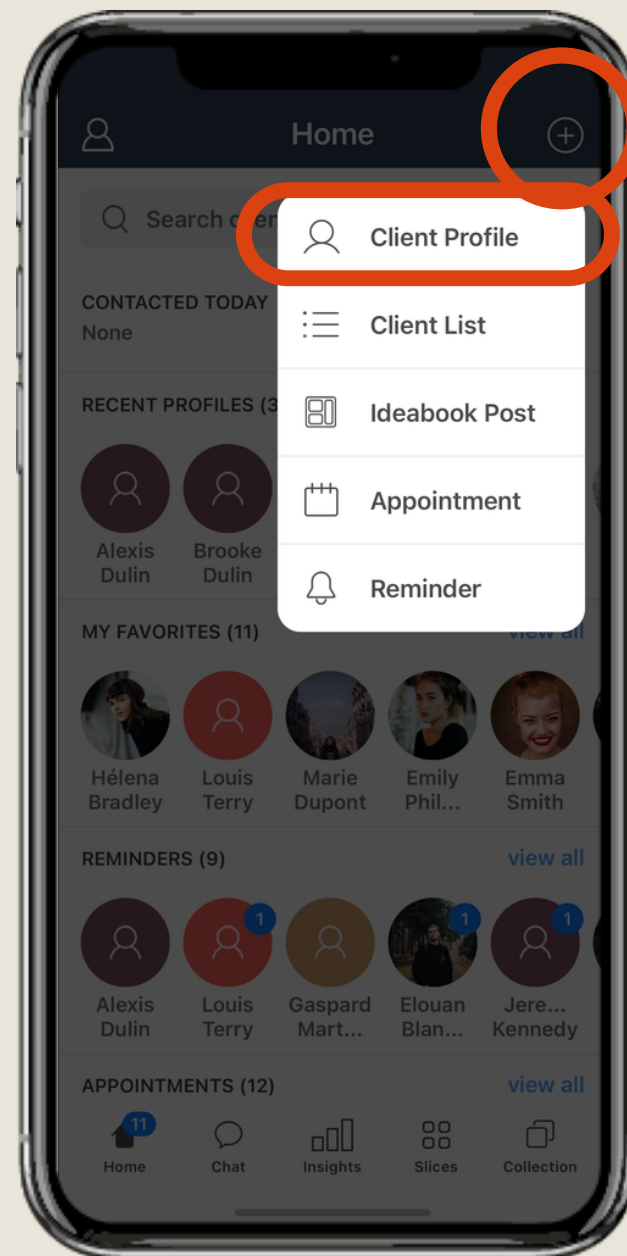
View your recovery code, save this in case you need to use it to log back into the app.



Help section houses common FAQ's and has a "contact support" section to send in support tickets.

# CREATE A CLIENT PROFILE

# BSPK



To manually create a client profile, choose the "client profile" option.

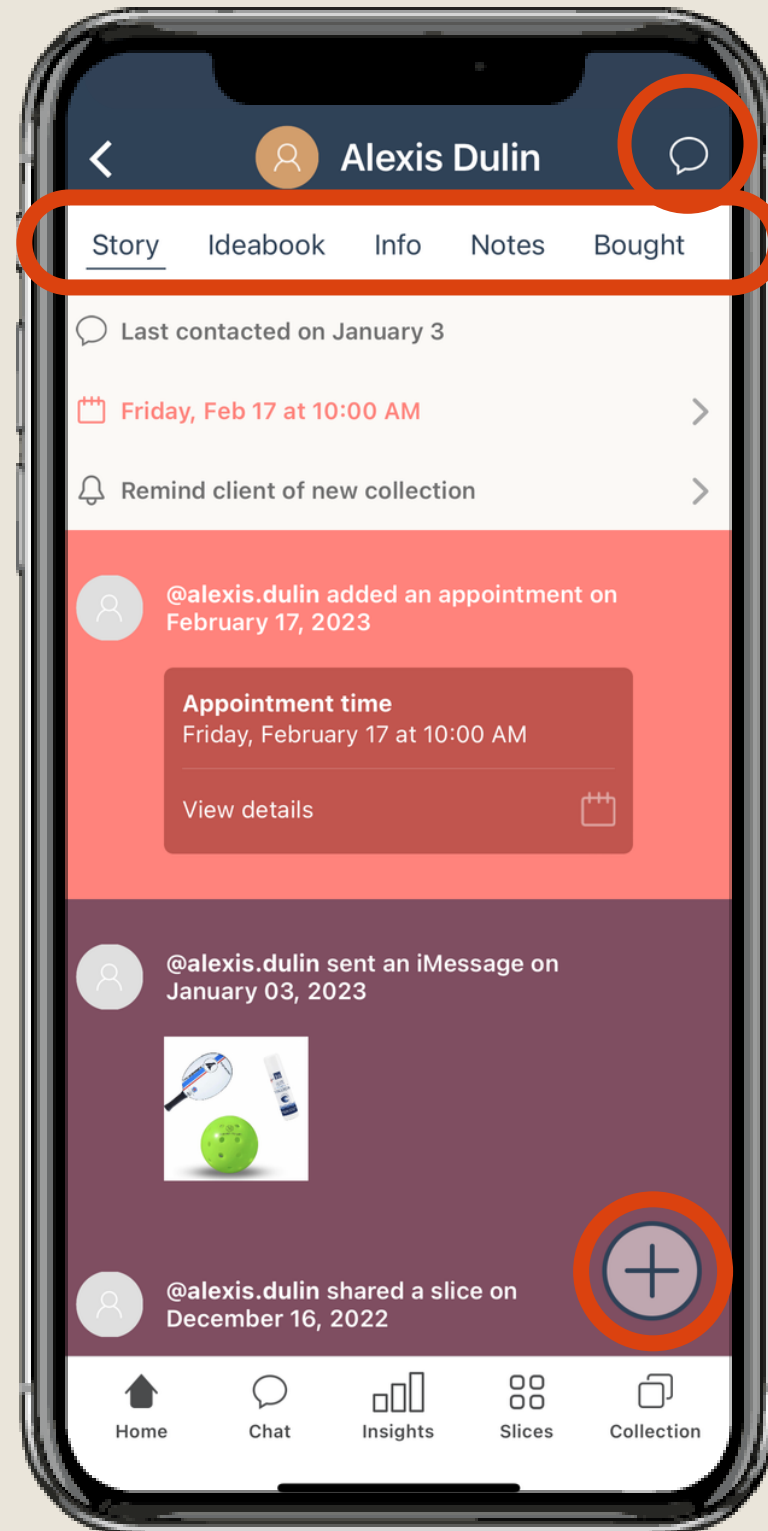


On the "New Client" screen, you can fill out the client's information and get contact consent.



You can add clients in bulk from your phone contacts through your profile screen

## INSIDE A CLIENT PROFILE



View messages you sent, ideabook links you sent, client notes, their likes/dislikes, their purchases, and their wishlist. Use your finger to slide through the menu options at the top.

Appointments and reminders will show up at the top of a client profile



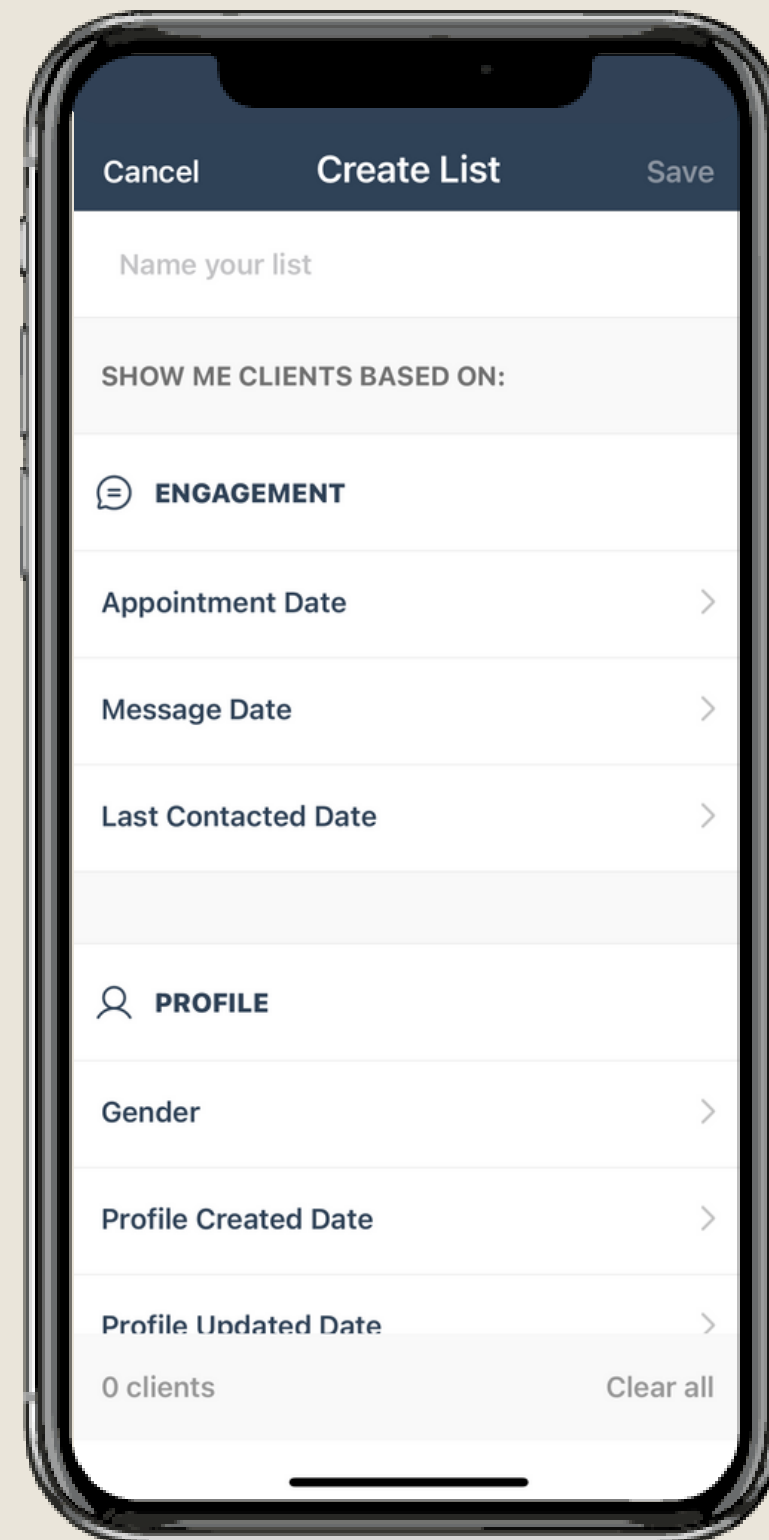
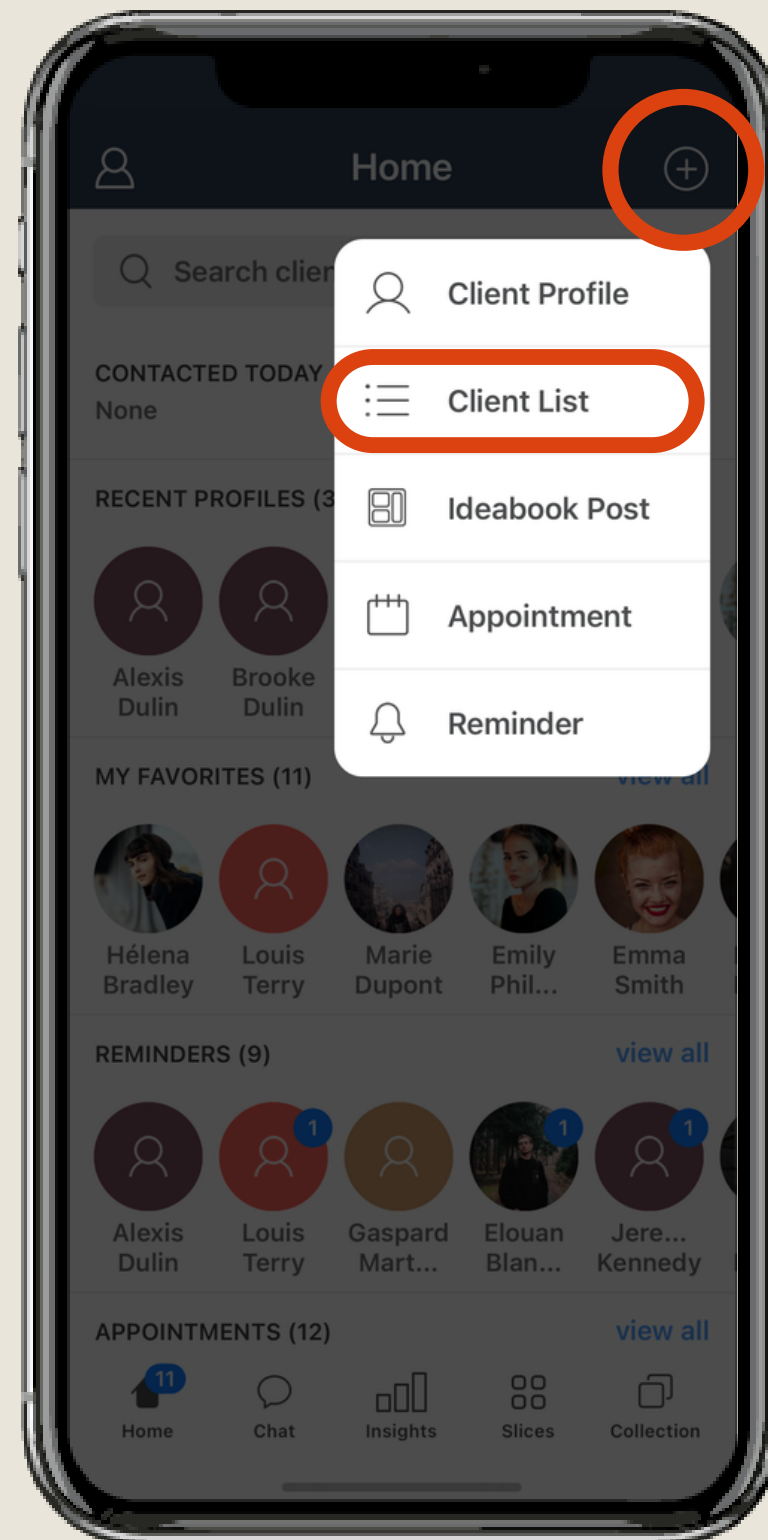
Use the info button to update the client's information.

Use the chat icon in the upper right corner to take you to messages.

Use plus icon to quickly share an ideabook post, write a note, schedule an appointment, create a reminder or add client to a list.

# CREATE A CLIENT LIST

BSPK

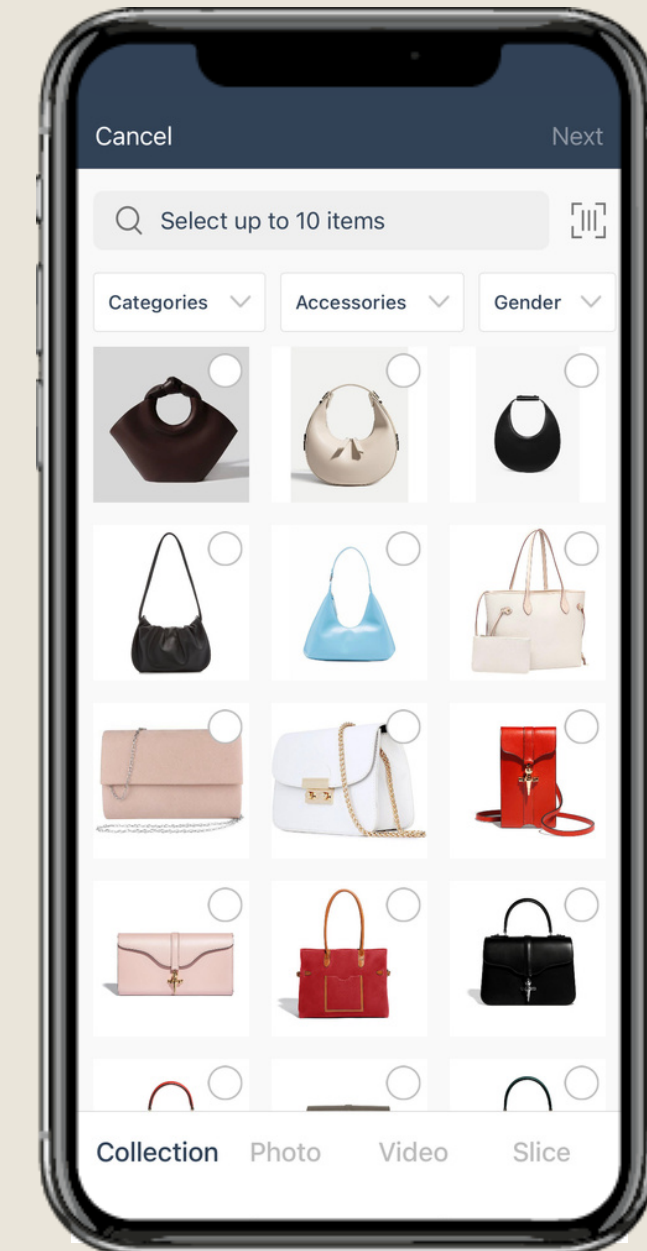
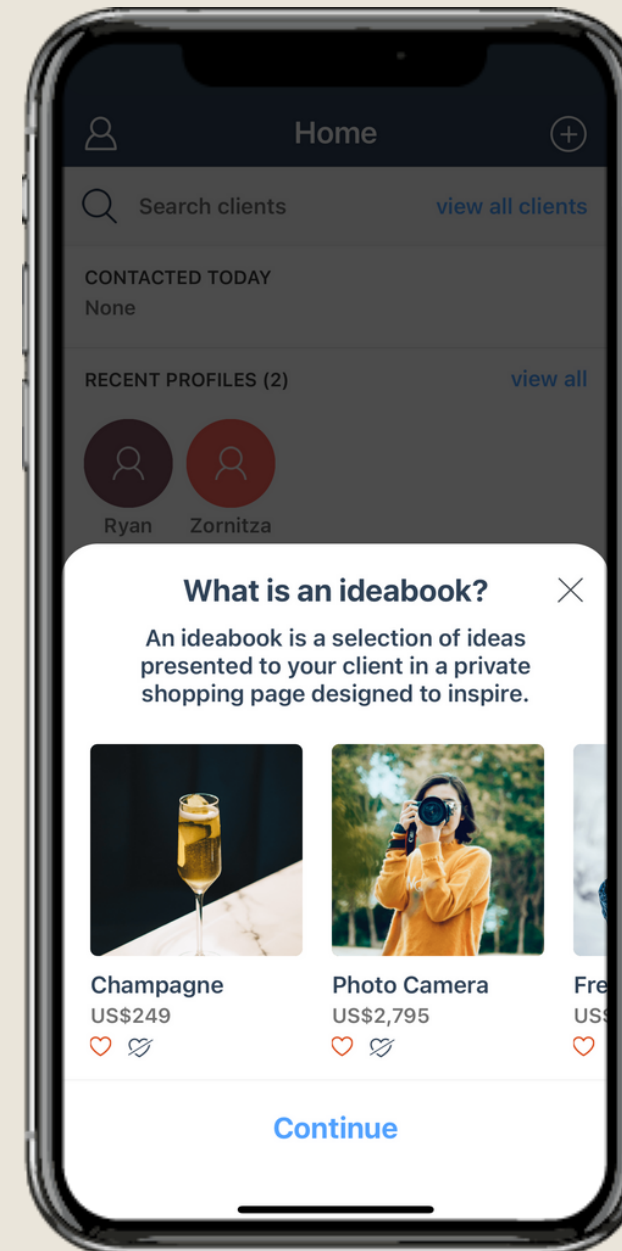
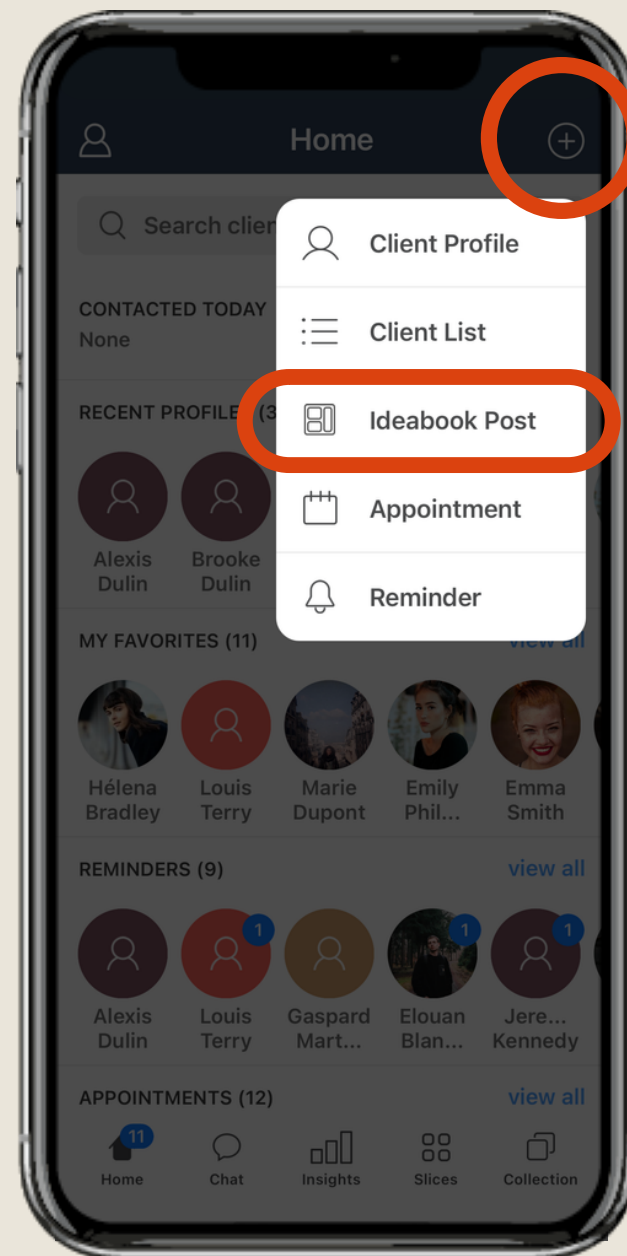


Organize your clients into lists based on client information like engagement, profile characteristics, and more.



# CREATE AN IDEABOOK POST

BSPK



Select "Ideabook Post" to curate a selection of products to send to your client.



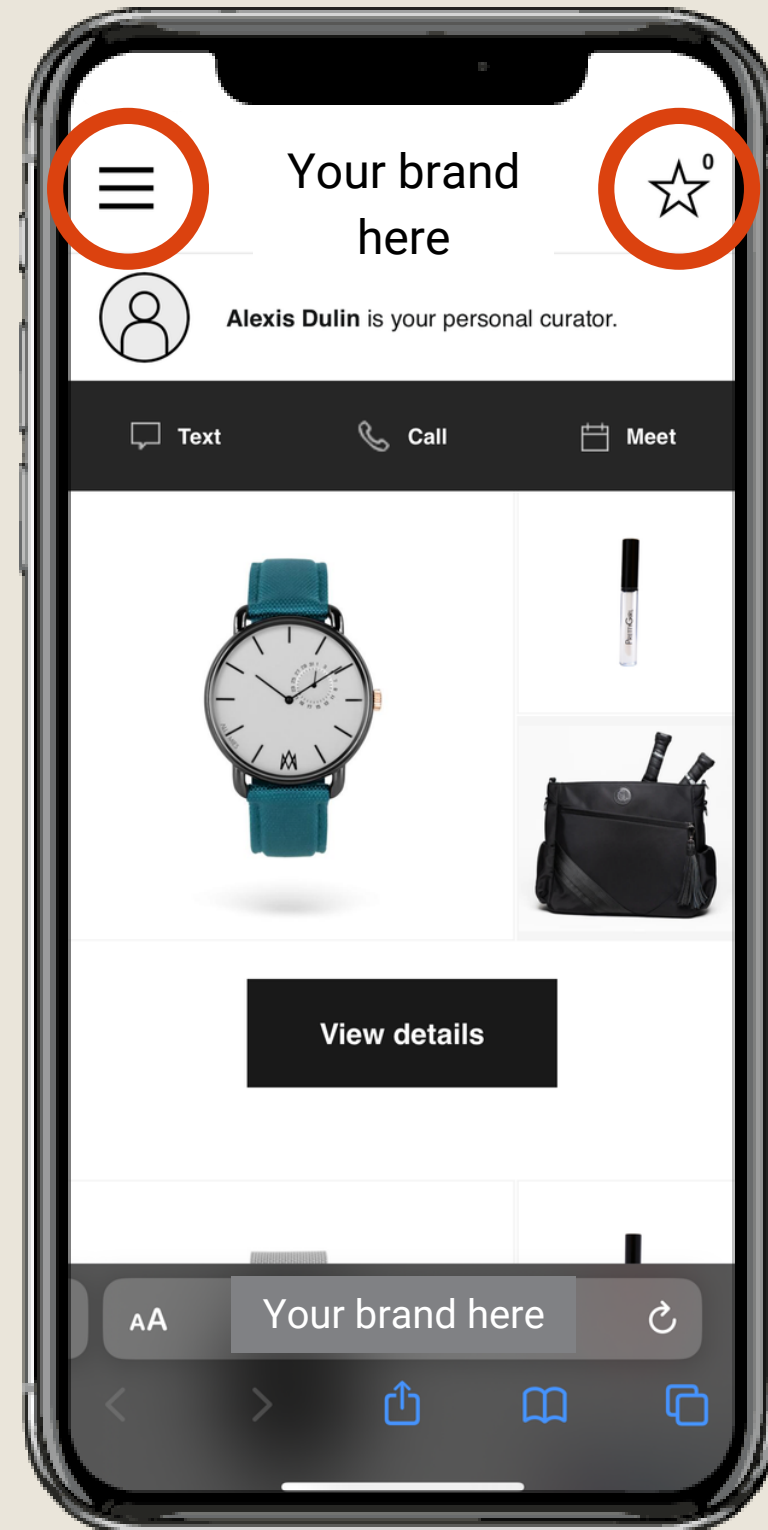
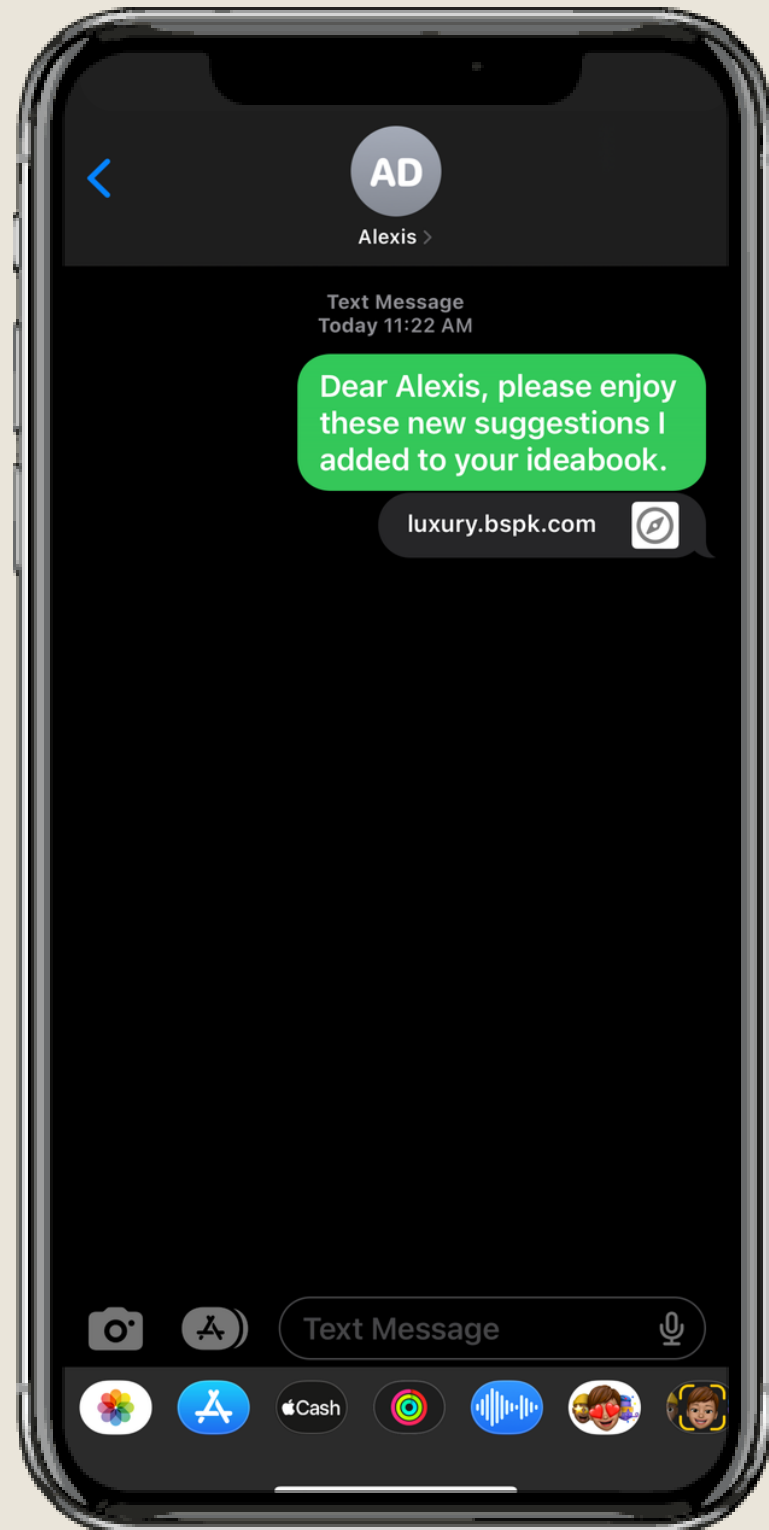
Share a selection of products directly with your client via a private shopping page.



Choose selections from your collection in the app for you to sell to your clients

# IDEABOOK FOR THE CUSTOMER

# BSPK



Clients will receive a custom link with your branding that leads them to their Ideabook.

Ideabook page will include your logo.

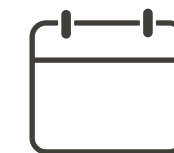
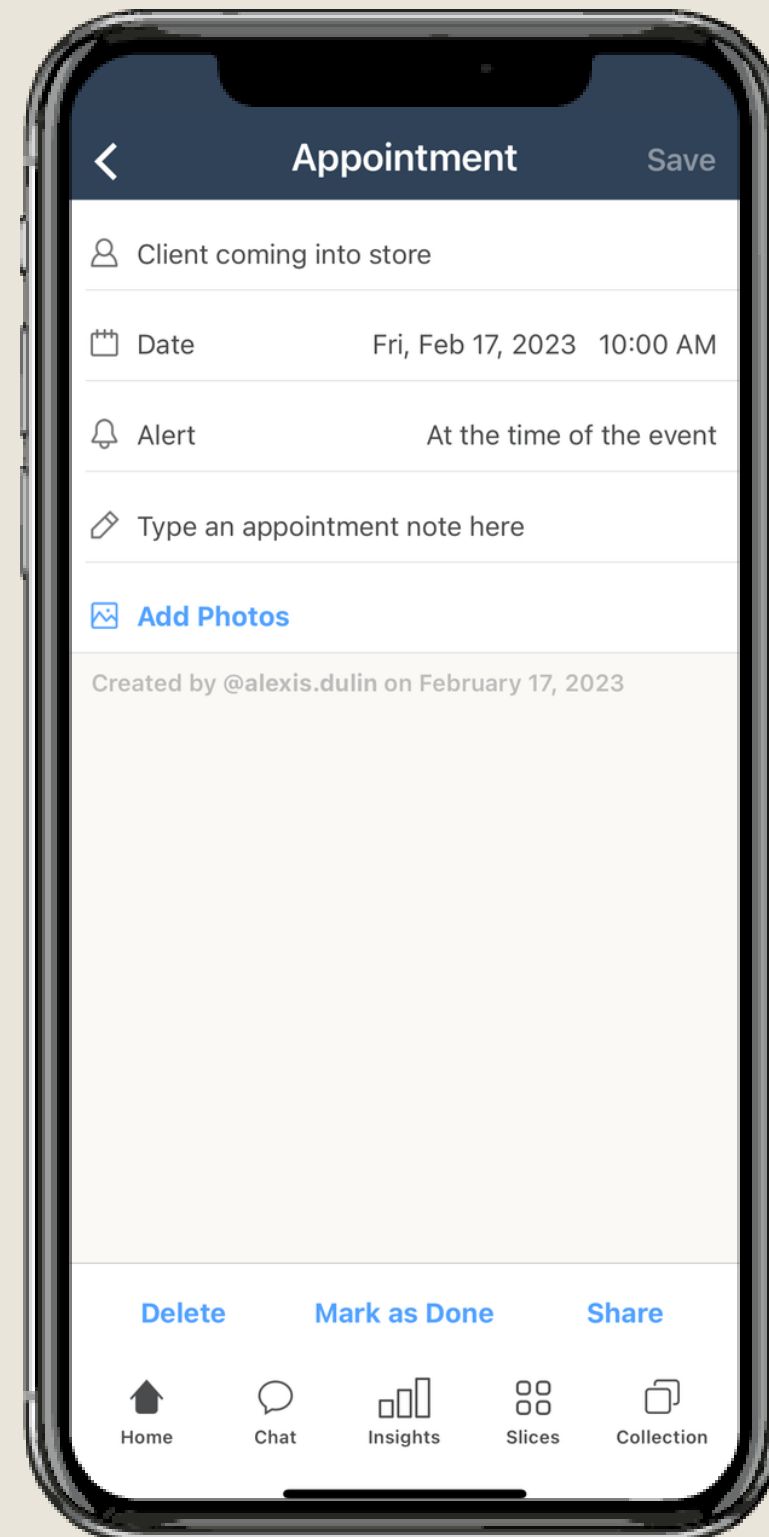
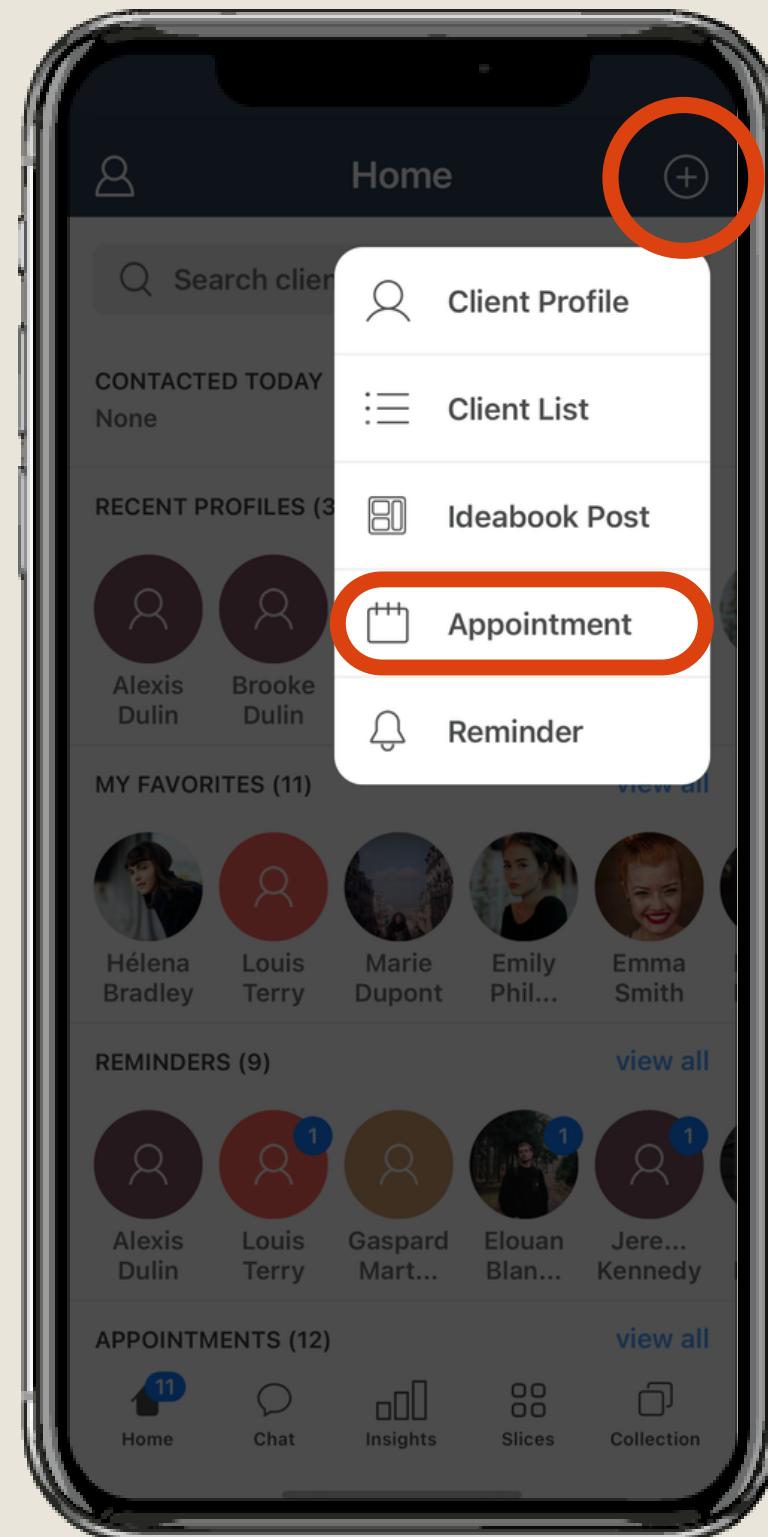
Clients can then view product details, message, call, make an appointment with you.

Clients can use the icon in the upper left corner to update their profile and their communication preferences.

Clients can use the star icon in the upper right corner to view their wishlist.

# CREATE AN APPOINTMENT

# BSPK

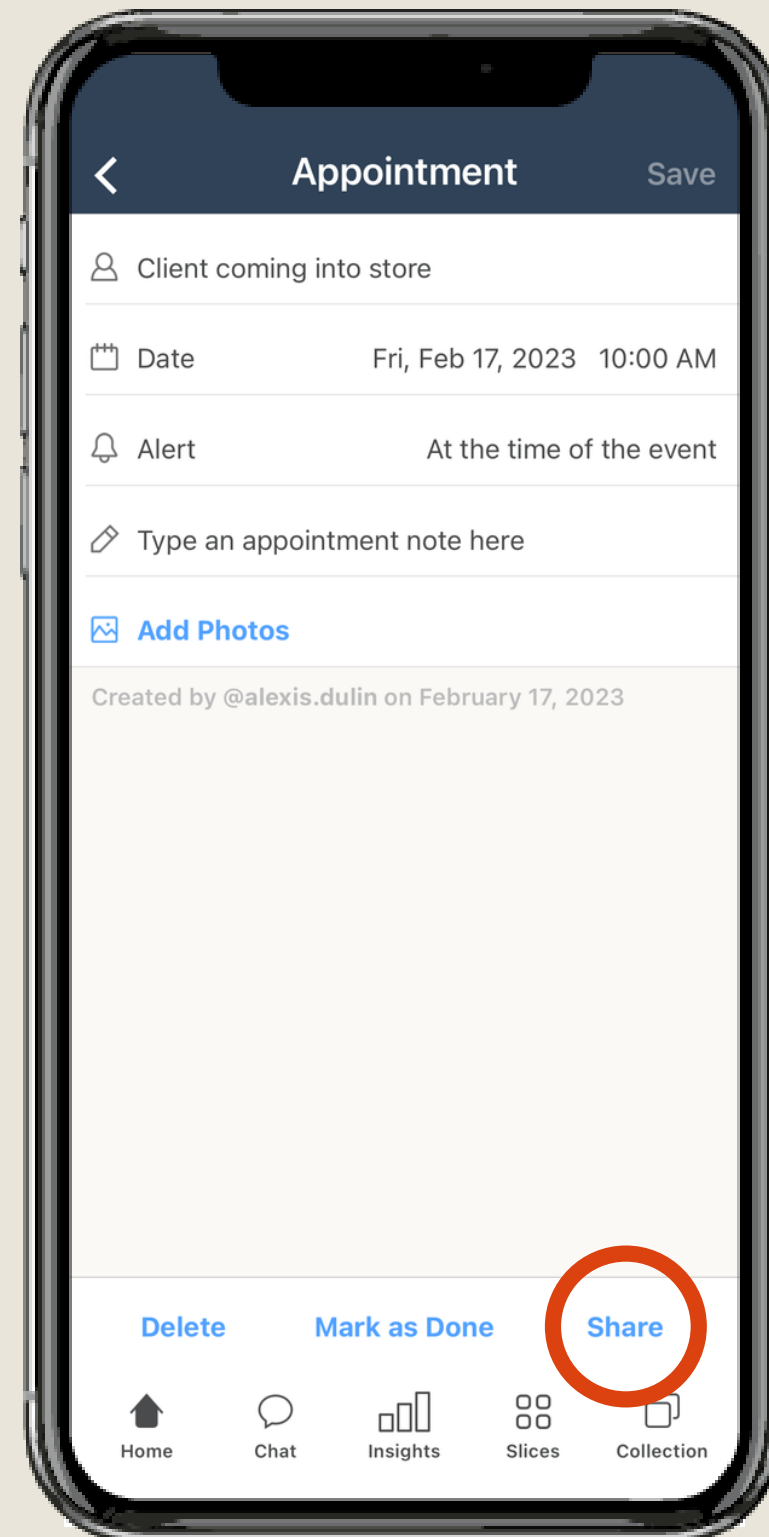
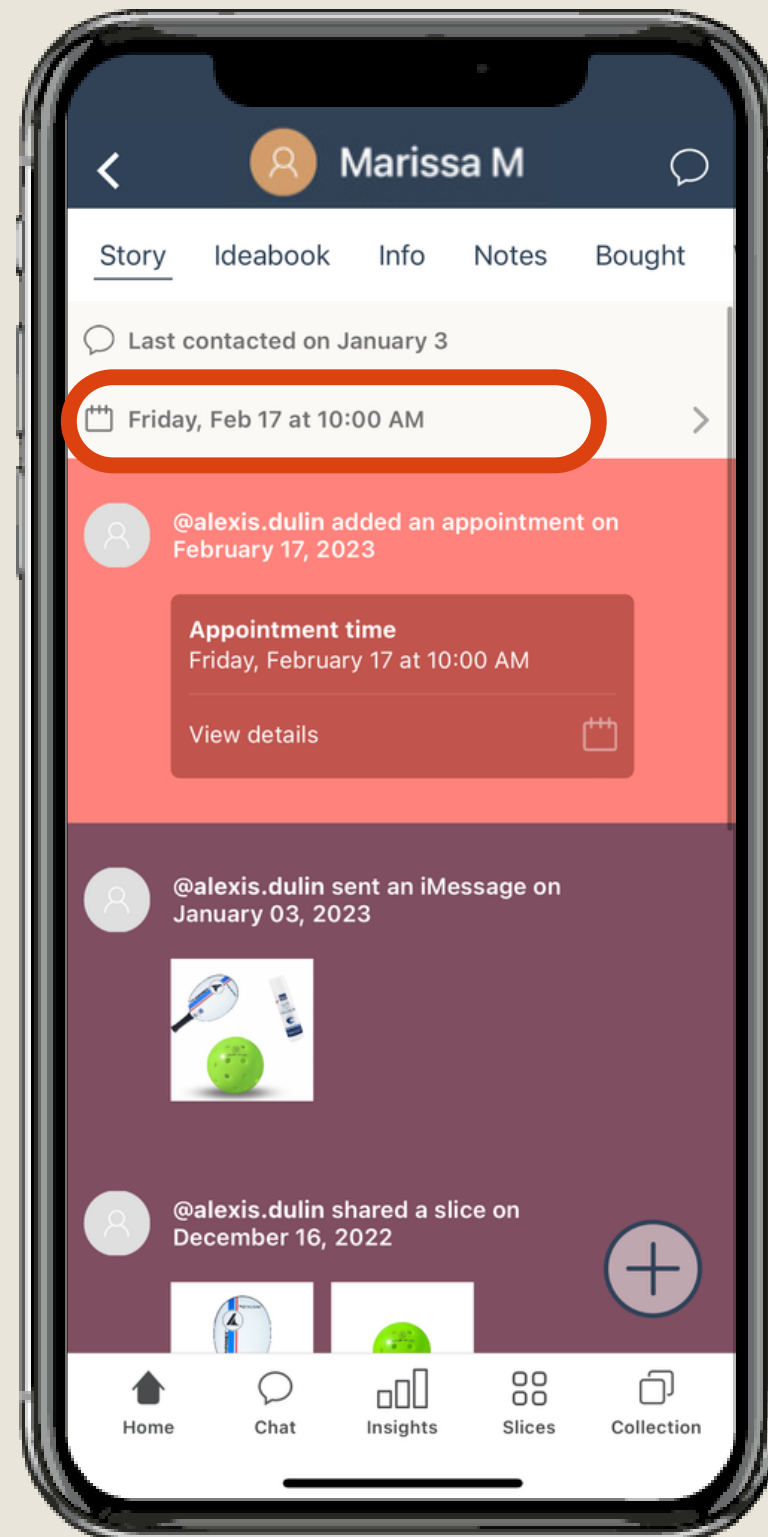


Tap “Appointment” in the menu on the home screen or from a client profile and select your client from your contact list.

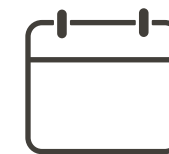
Fill out the appointment information and save.

# CREATE AN APPOINTMENT CONT.

# BSPK



You can see the appointment on the client's profile and on your home screen in the appointments list.

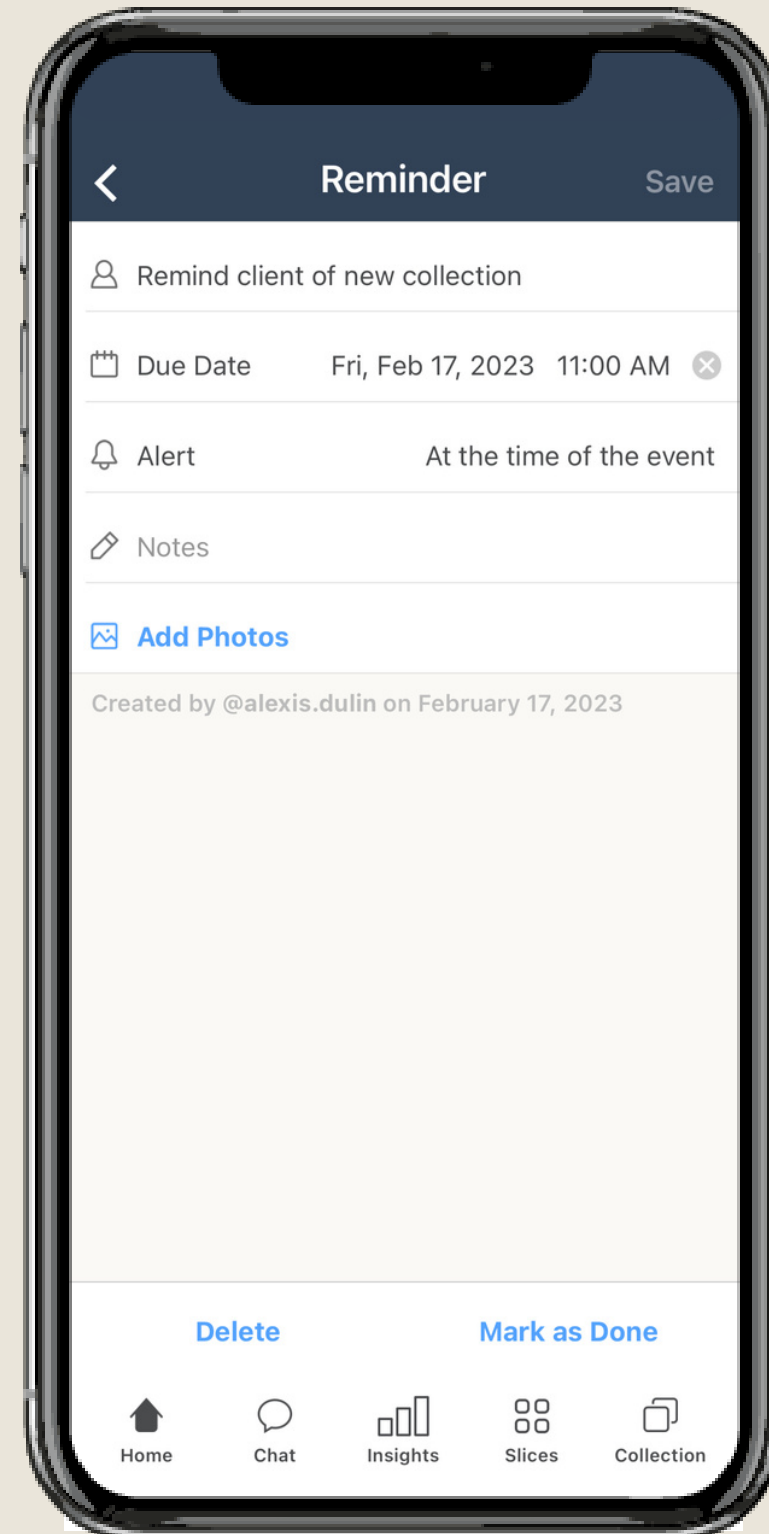
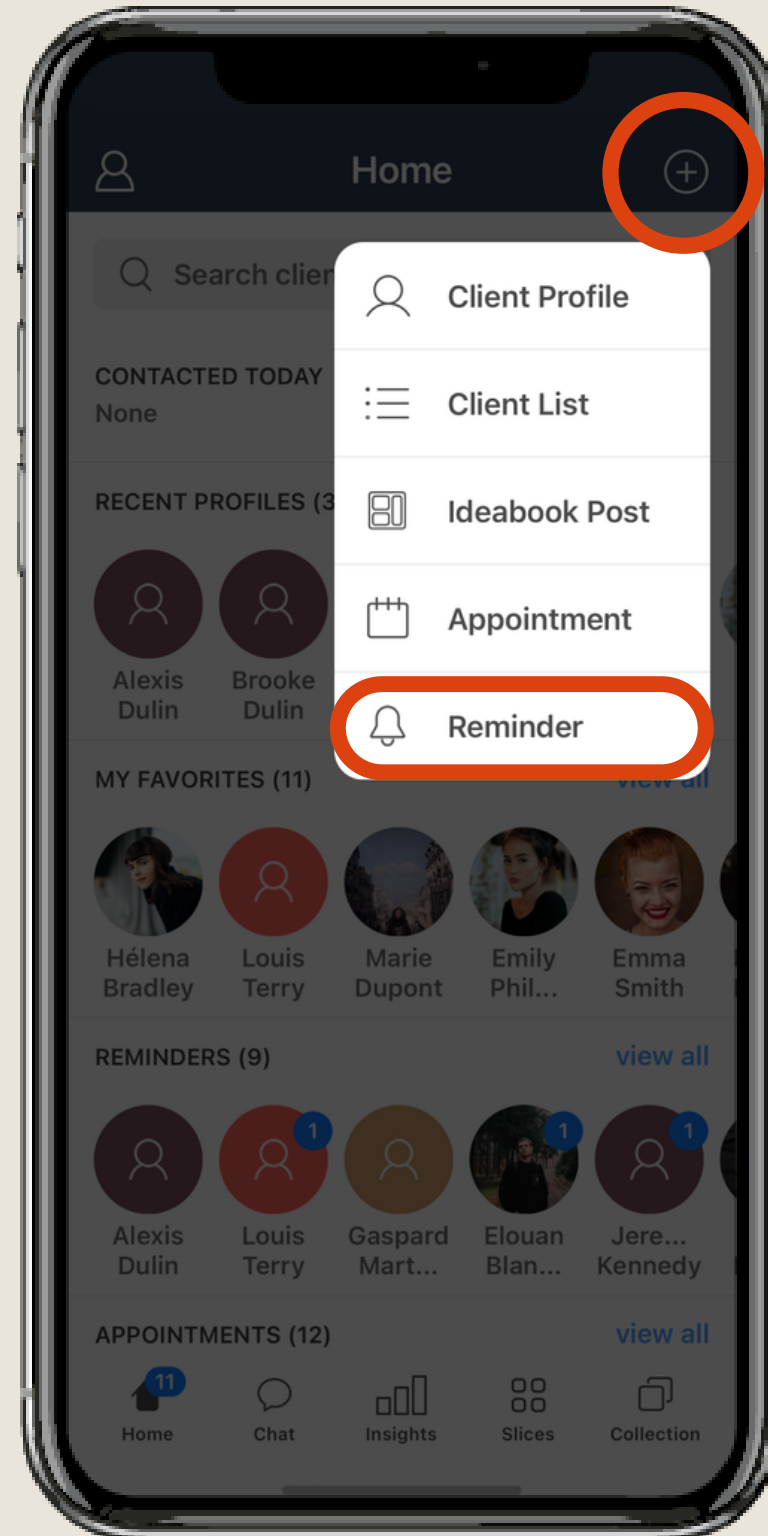


Share the appointment with your client by tapping the scheduled appointment.

You will receive a reminder notification from the BSPK app.

# CREATE A REMINDER

# BSPK



Create reminders for yourself right inside the BSPK app.

Select "Reminder" and choose the associated client or create directly from the client's profile. Fill out the information on the reminder screen.

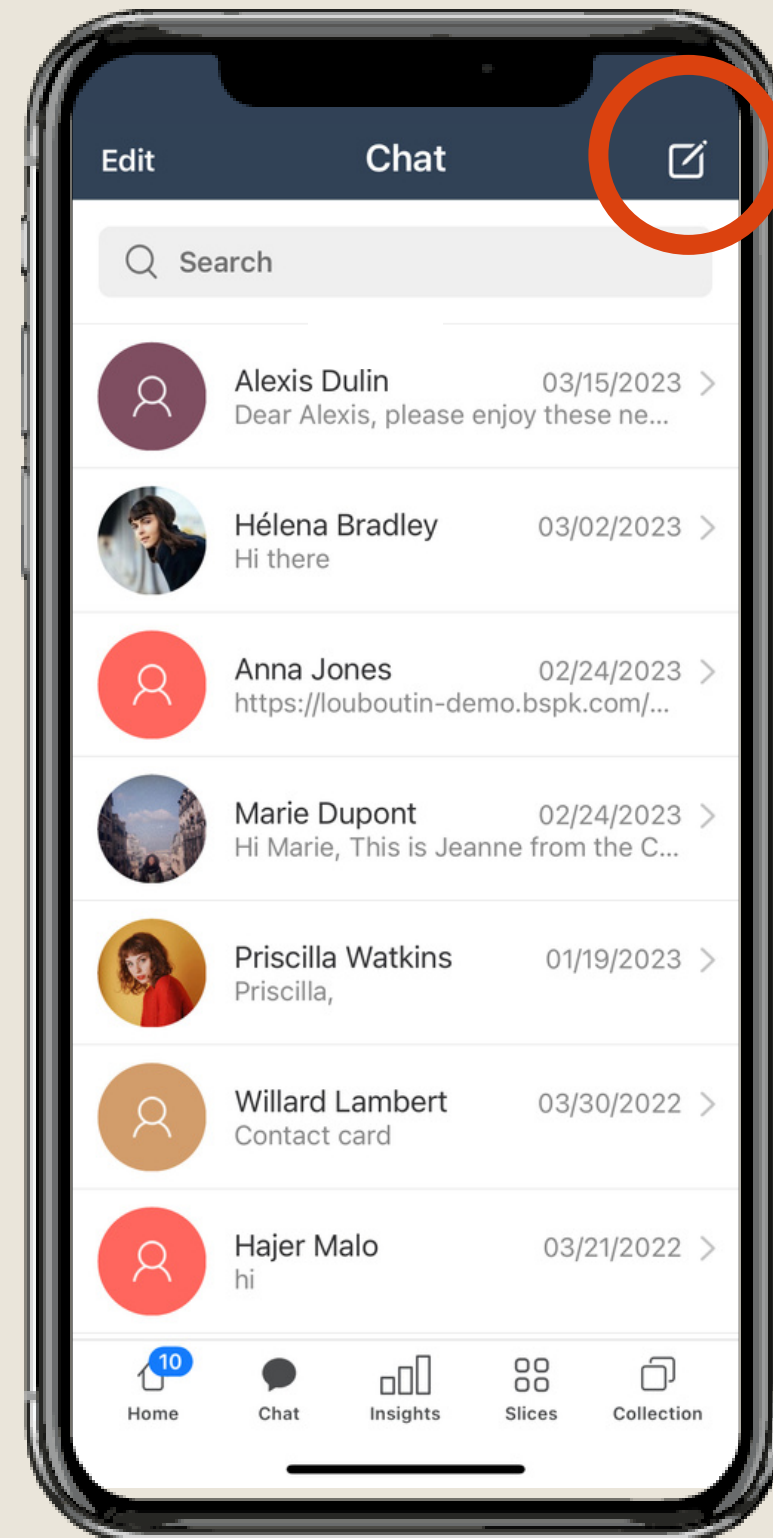
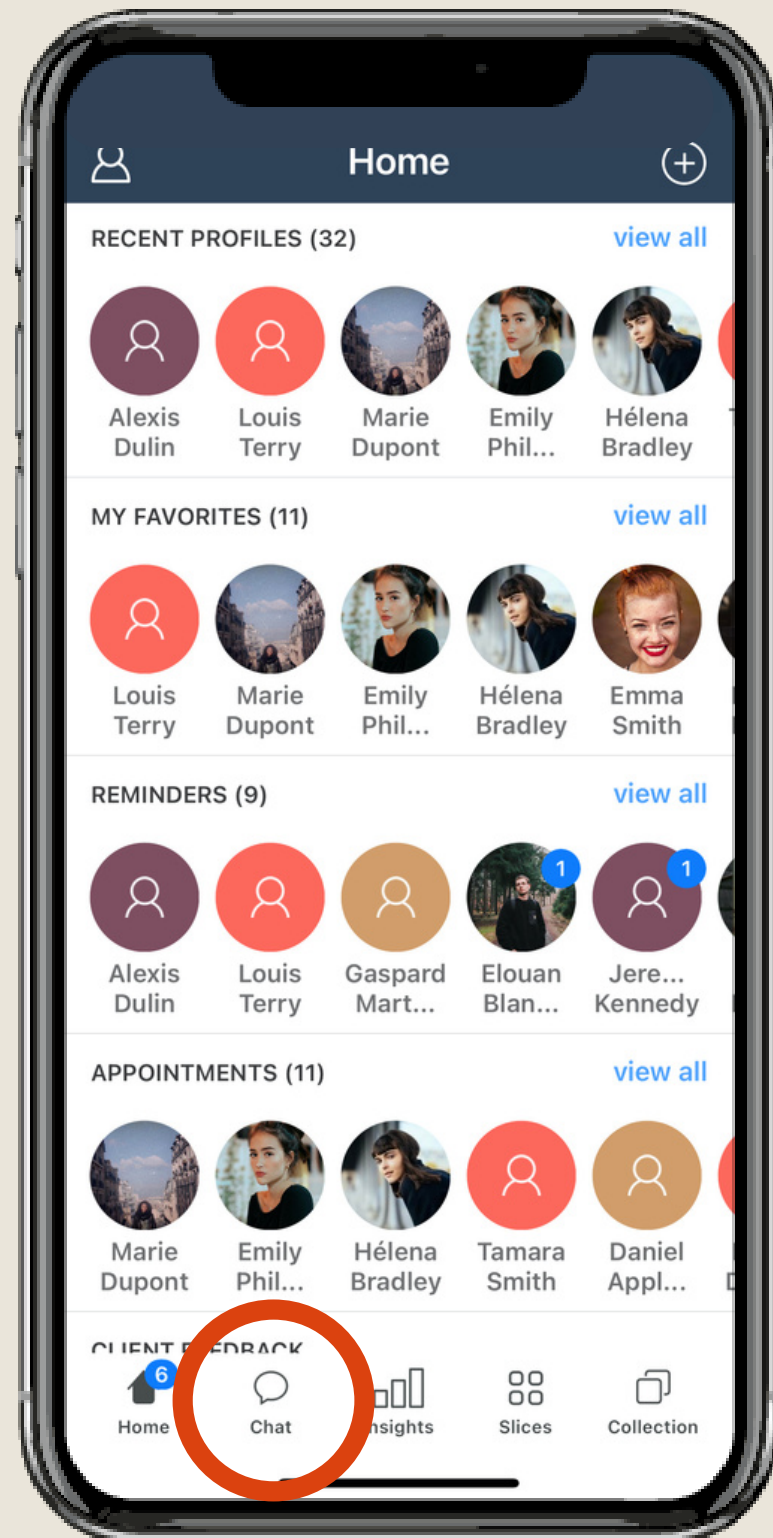


Reminder templates/prompts are preset in the app.

You will receive a notification for any upcoming reminder due date. Reminder will also show up at the top of a client's profile.

# SEND A CHAT

# BSPK



Tap the chat icon on the menu at the bottom of the screen to access your client conversations.

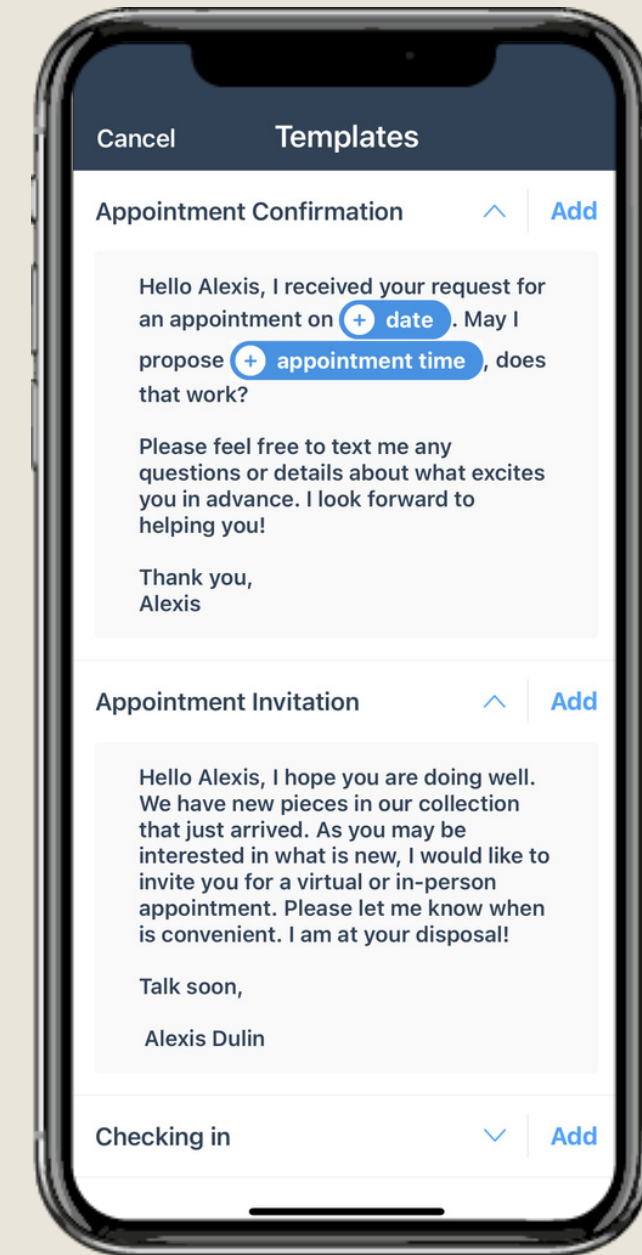
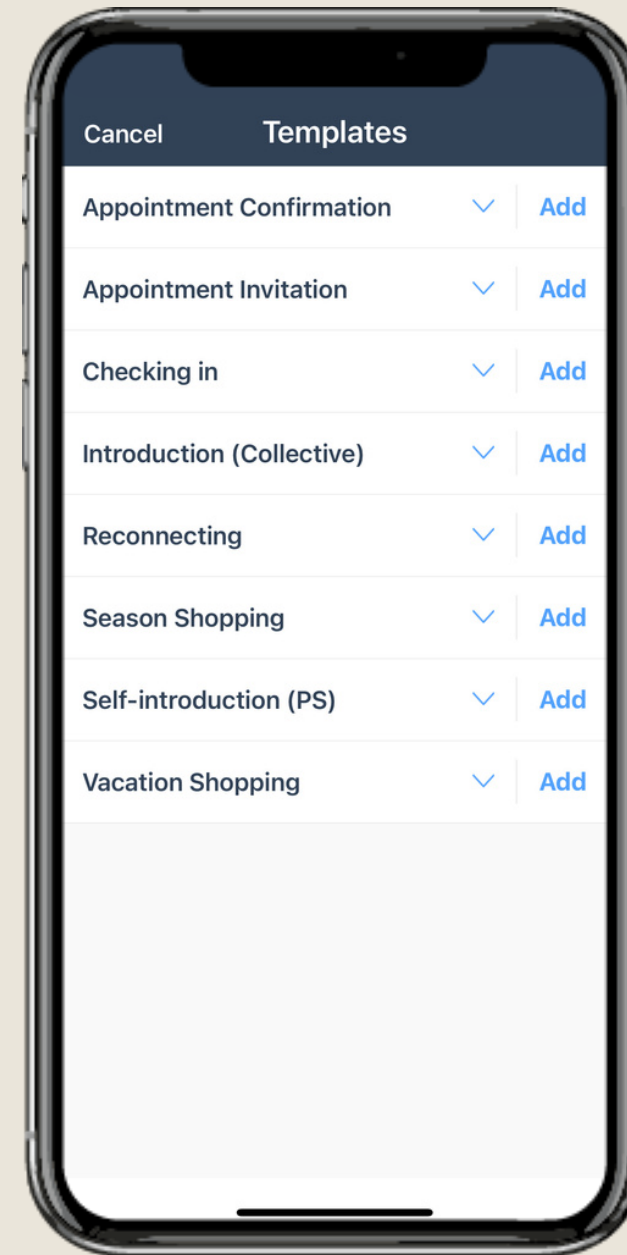
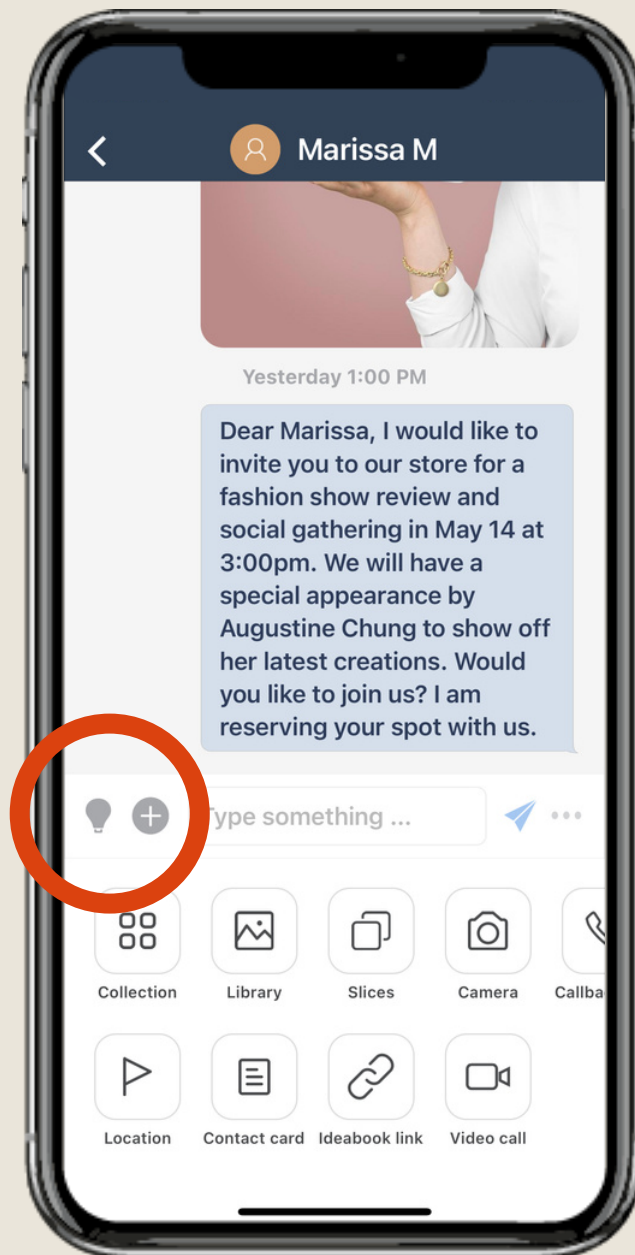



Start a new chat with icon in the upper right corner on the chat screen.


You can also enter a chat through a client's profile


# SEND A CHAT CONT.

# BSPK



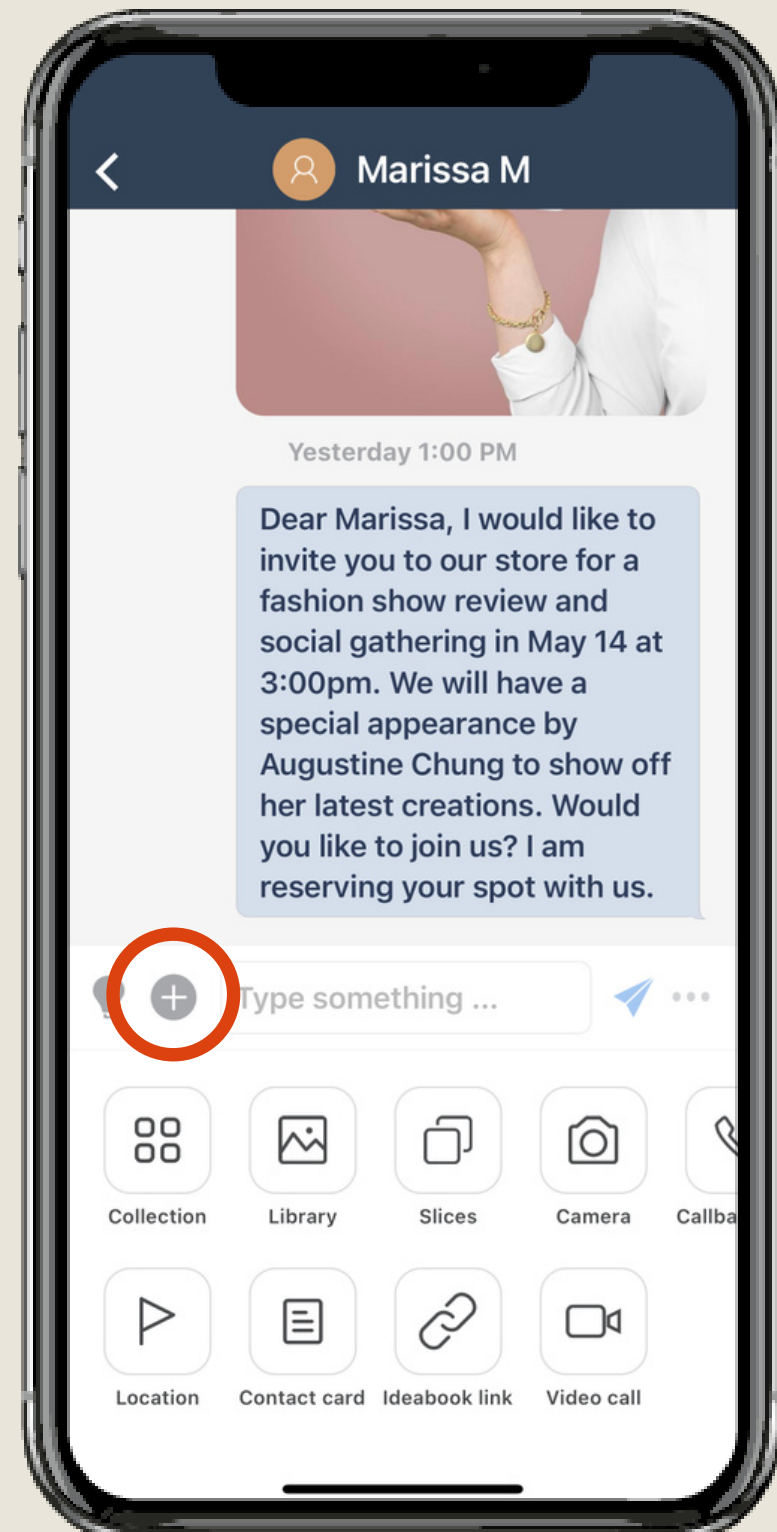
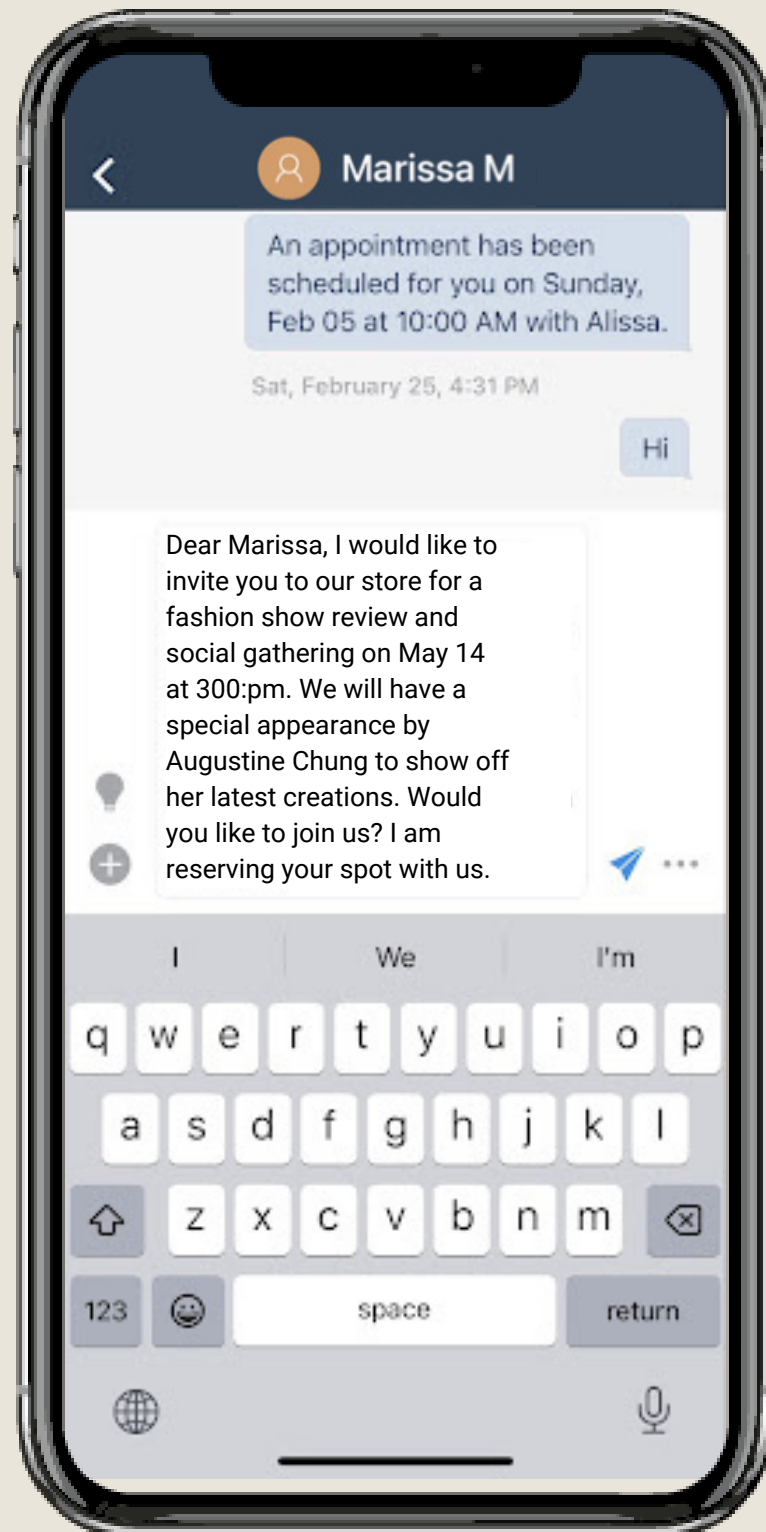
 On the chat screen, tap the light bulb icon to view pre-set templates to use in the chat.

 Choose from pre-set templates to message your clients.

 Easily customize your templates.

# SEND A CHAT CONT.

# BSPK



Tap the plus icon to view a list of different sending options.

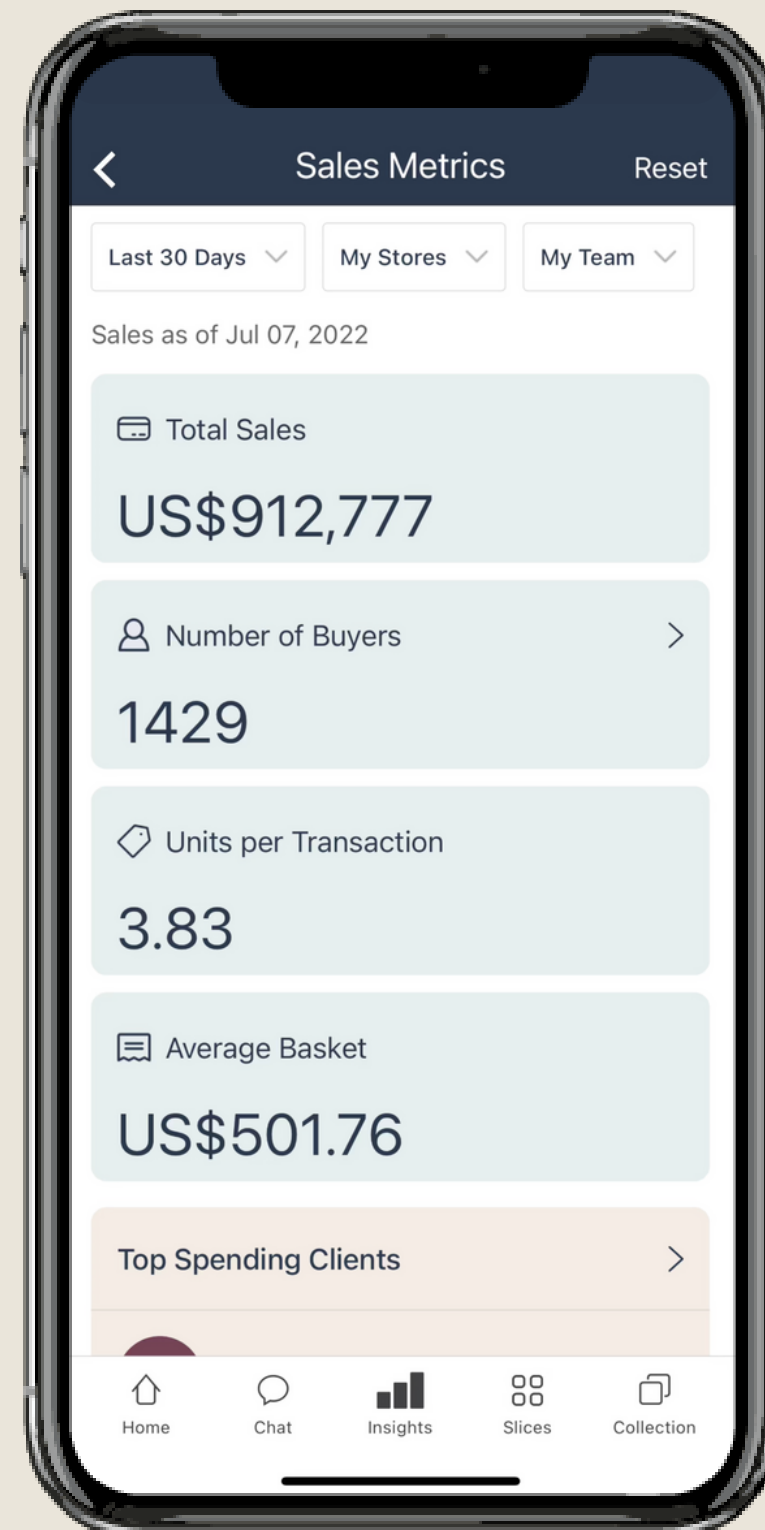
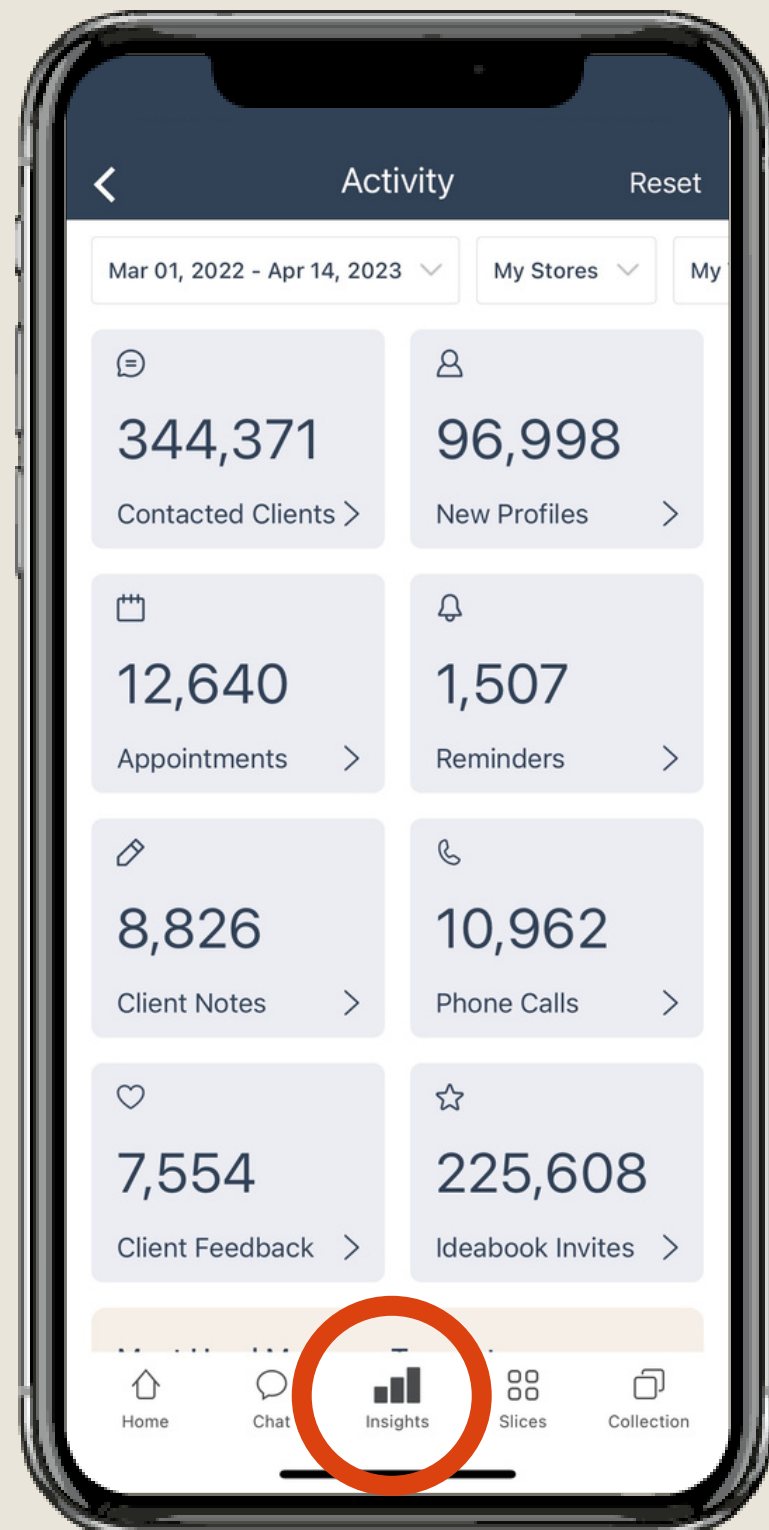
- Collection
- Library
- Slices
- Camera
- Location (if in a physical store)
- Contact Card
- Ideabook Link
- Callback Link





# INSIGHTS

# BSPK



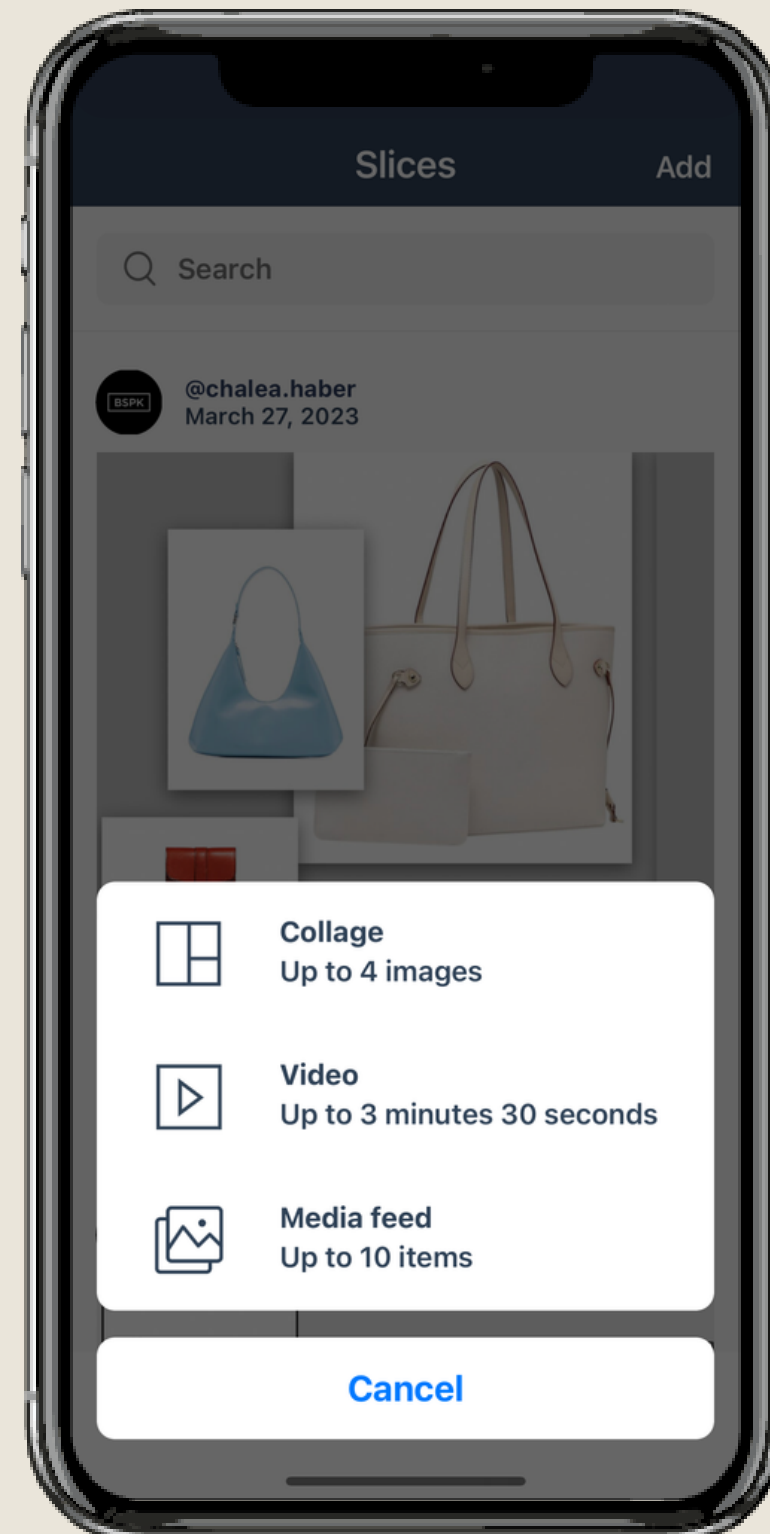
Tap the insights icon on the menu at the bottom of the screen to view your activities on the BSPK app.

Use the drop down menu to adjust the time period you want to view.

If connected to your POS system, view your sales history.

# CREATE A SLICE

# BSPK



Tap the Slices to view the Slices you and your team create.

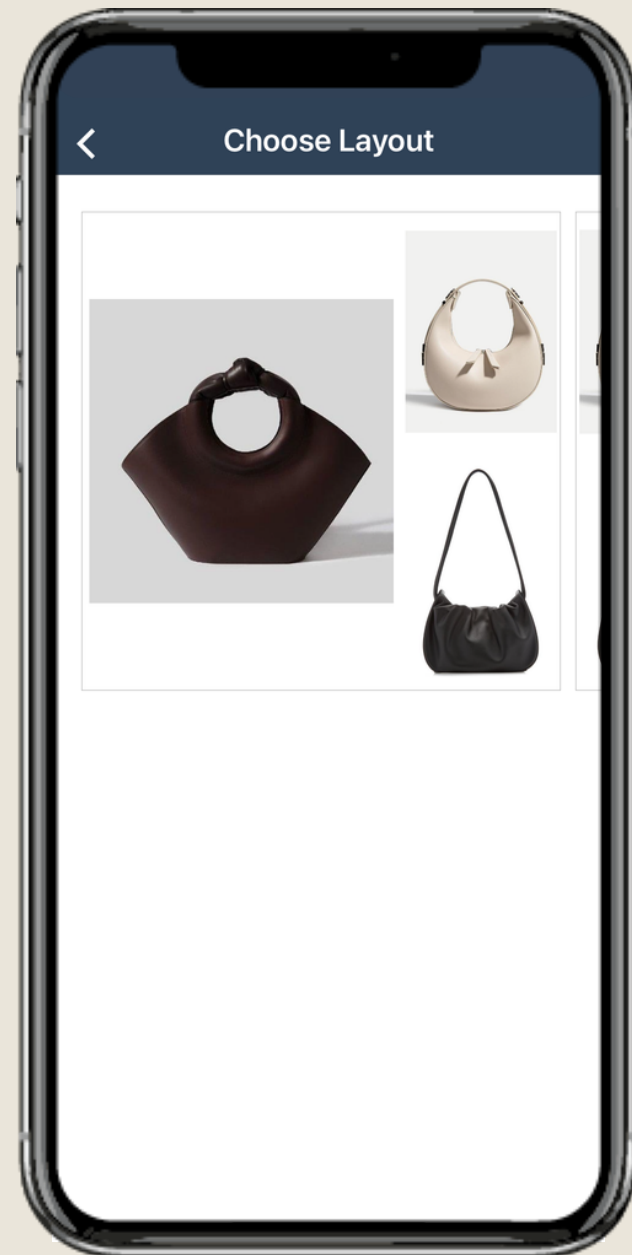
Slices are a way for you to create collages of photos or videos for you to share with your clients and team members.



To create a new slice, tap Add in the upper right corner.

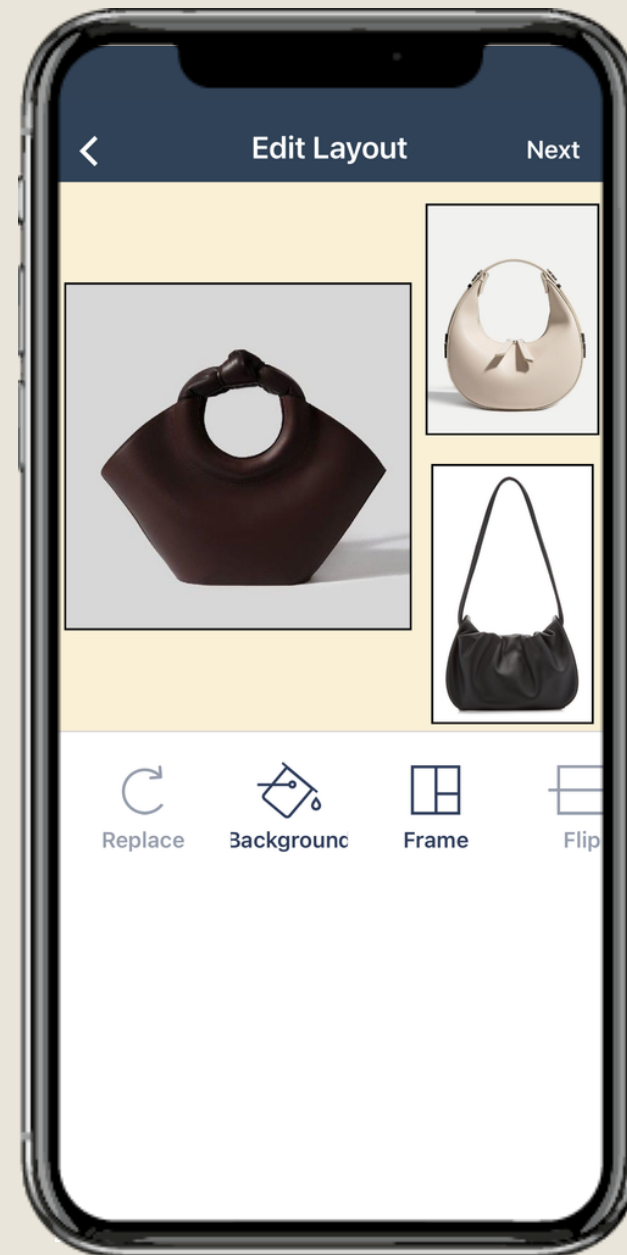
Select the type of slice you would like to create, then choose the media from your collection, phone or take a photo/video.



# CREATE A SLICE CONT.

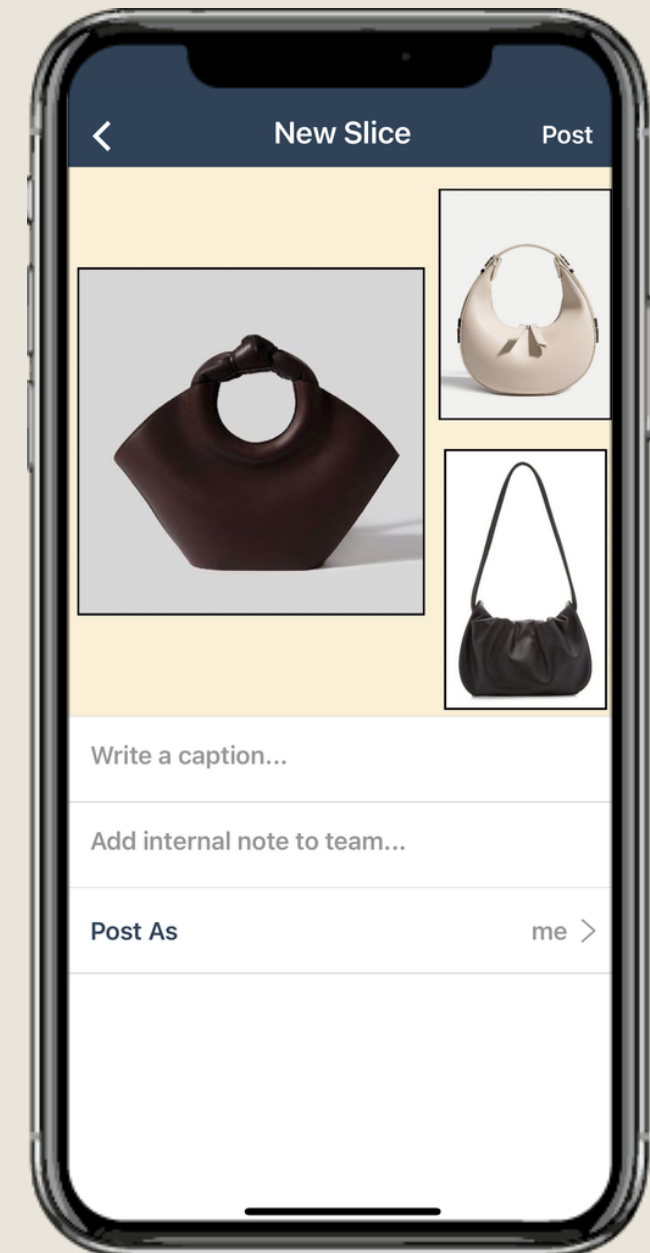
# BSPK





  Scroll between different layouts for a slice.



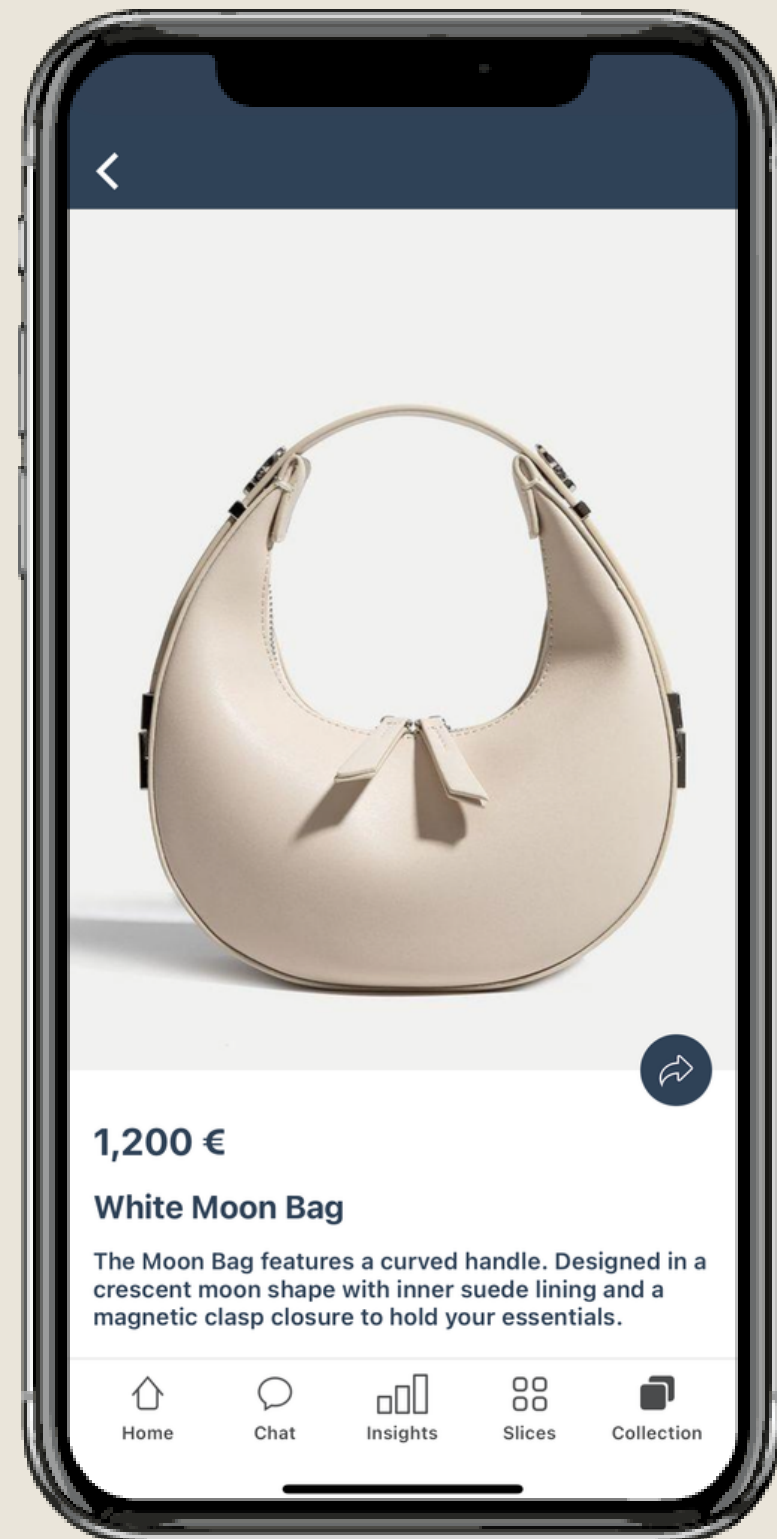
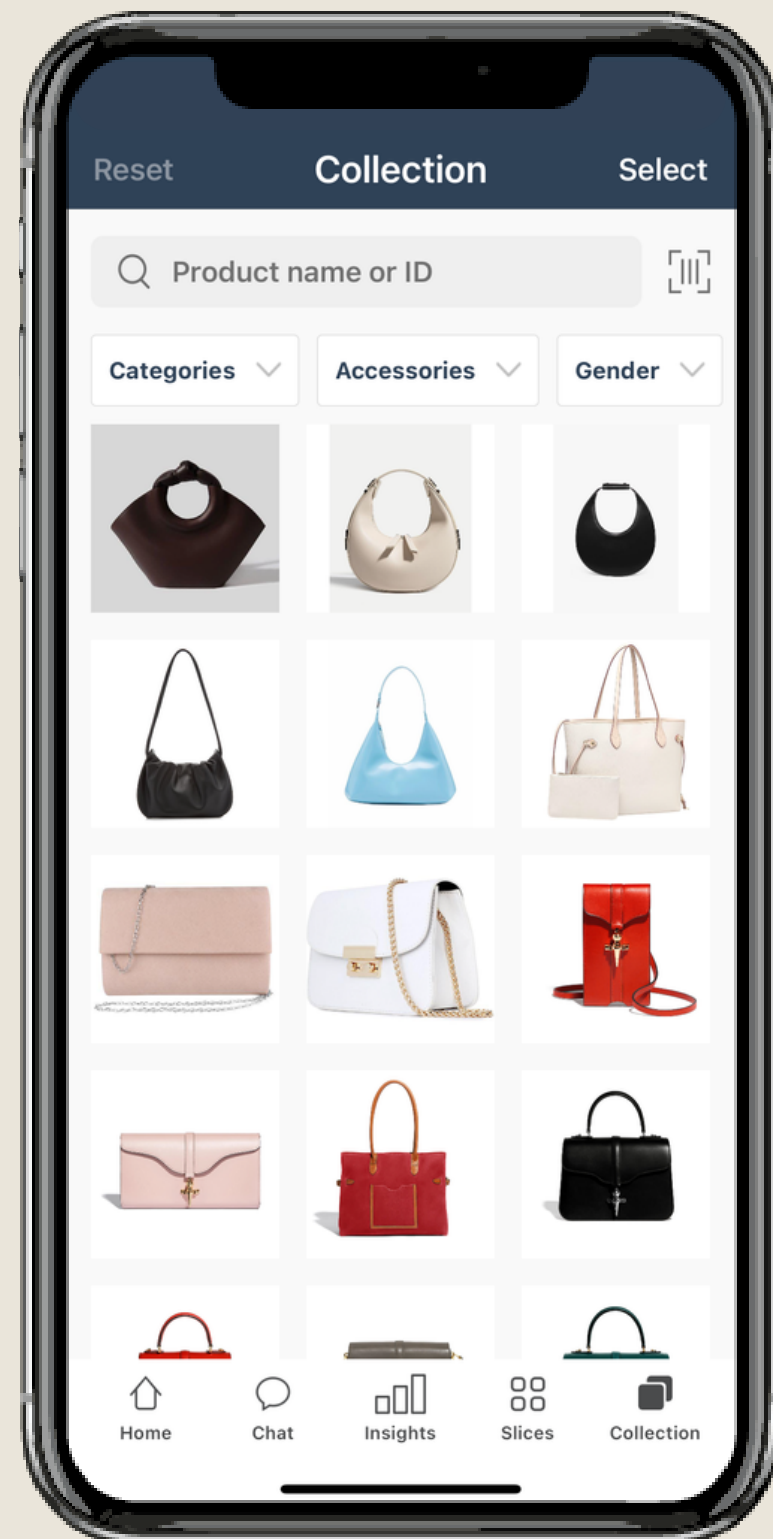
  Edit the layout by changing things like, background color, frame, photo size, etc.



  Add a caption or notes to a slice and tap post. You can share the slices with other advisors or clients.

# COLLECTION

# BSPK



Tap the collection icon on the bottom menu.

Here you can view all your sellable products.



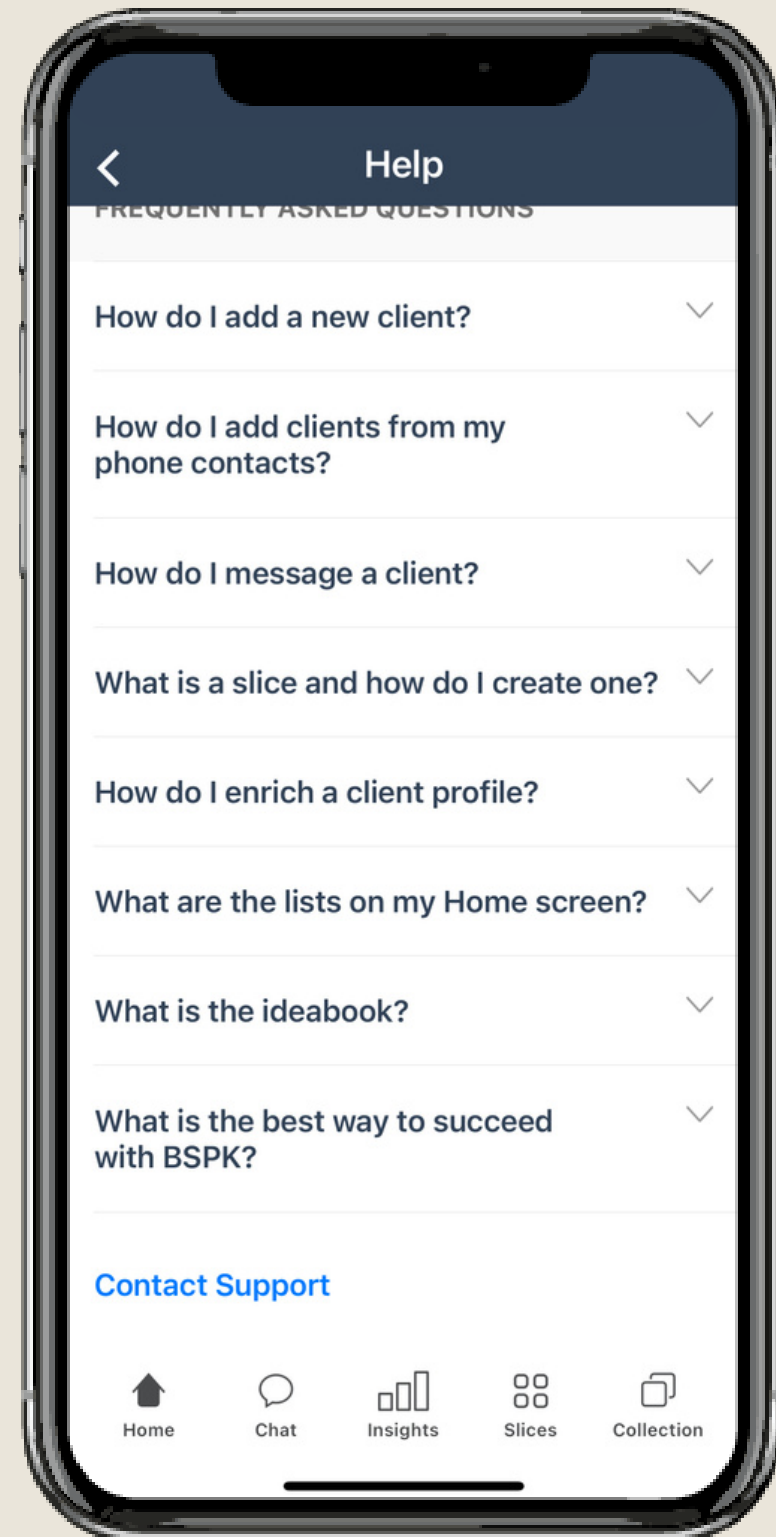
Use the drop downs to filter and search for products.

Tap on a product to view product details and to share product images to your clients.

Scan available for those who need to scan barcodes in-store

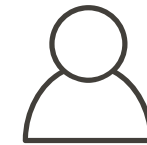
# CONTACT SUPPORT

# BSPK



Tap the My Profile icon in the top left corner.

Here you can find FAQ's.



Tap Contact Support to open a support ticket.

Provide a brief description and or screenshots and videos if applicable.

A BSPK support member will get back to you ASAP.