

BSPK



BSPK APP TRAINING

Everything you need to know about
the BSPK app

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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

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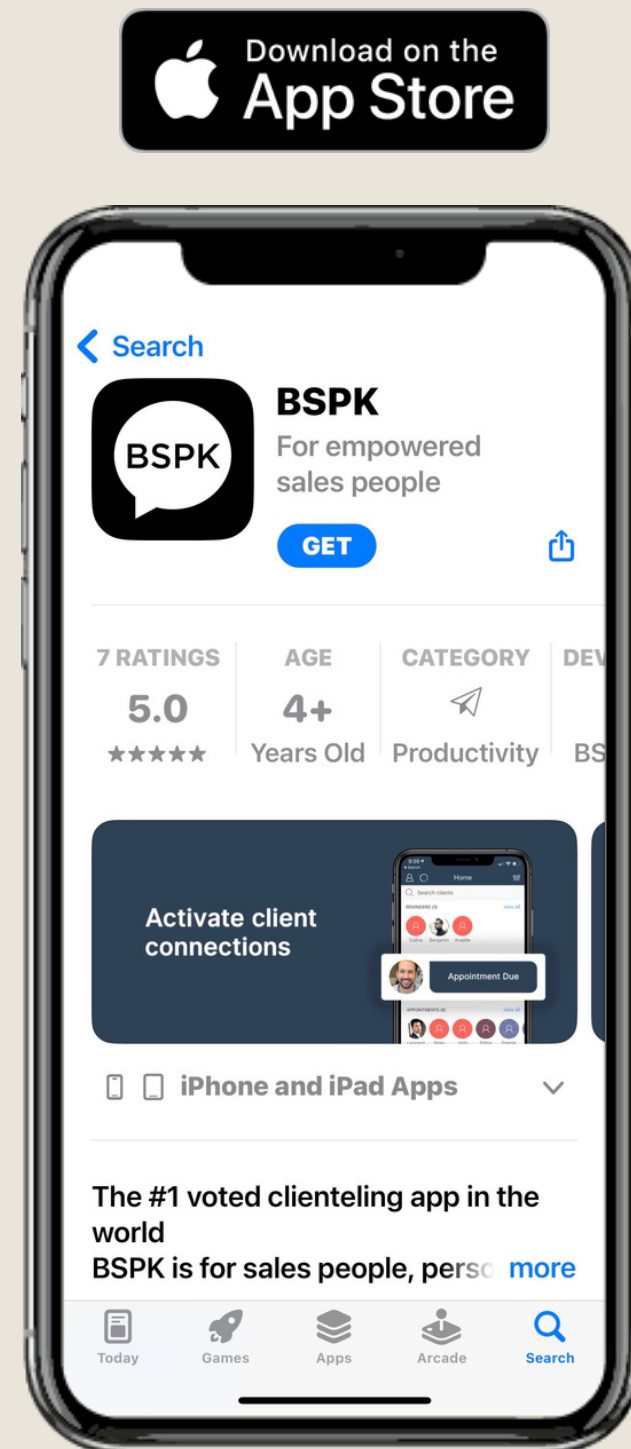
QUICK START: CHECK LIST

1. Download the BSPK iOS app from the App store
2. Create your account by signing with your mobile phone number
3. Sync your phone contacts to the BSPK mobile app or manually add client profiles
4. Send your first message and start your clienteling journey

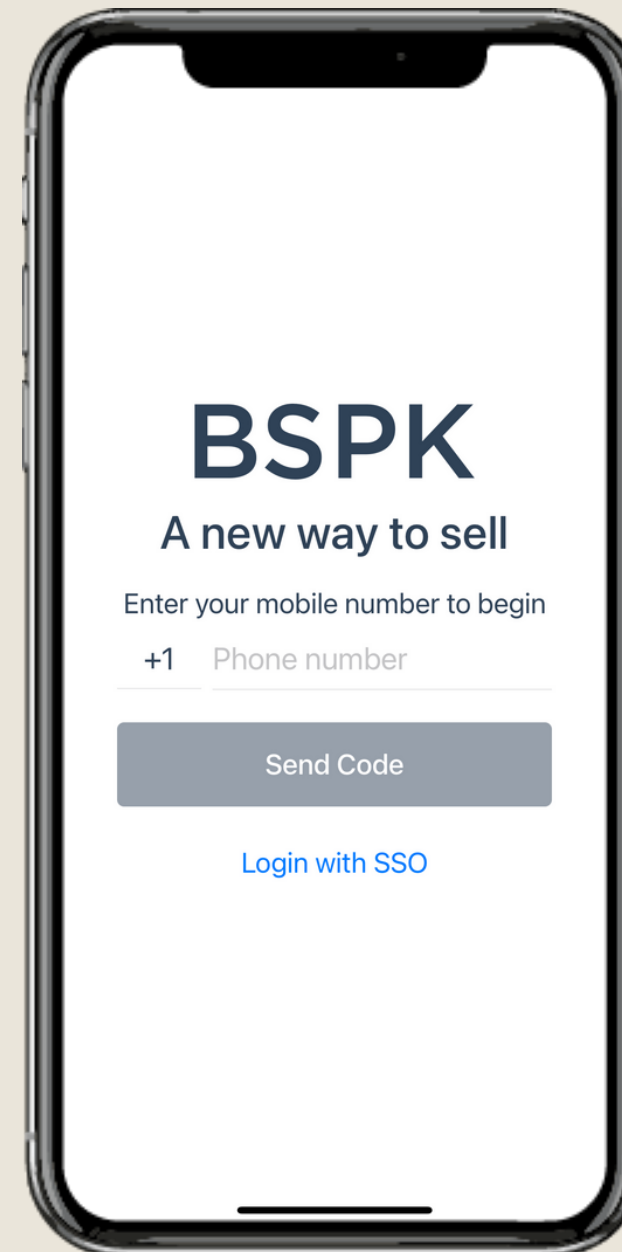


DOWNLOAD & SET UP

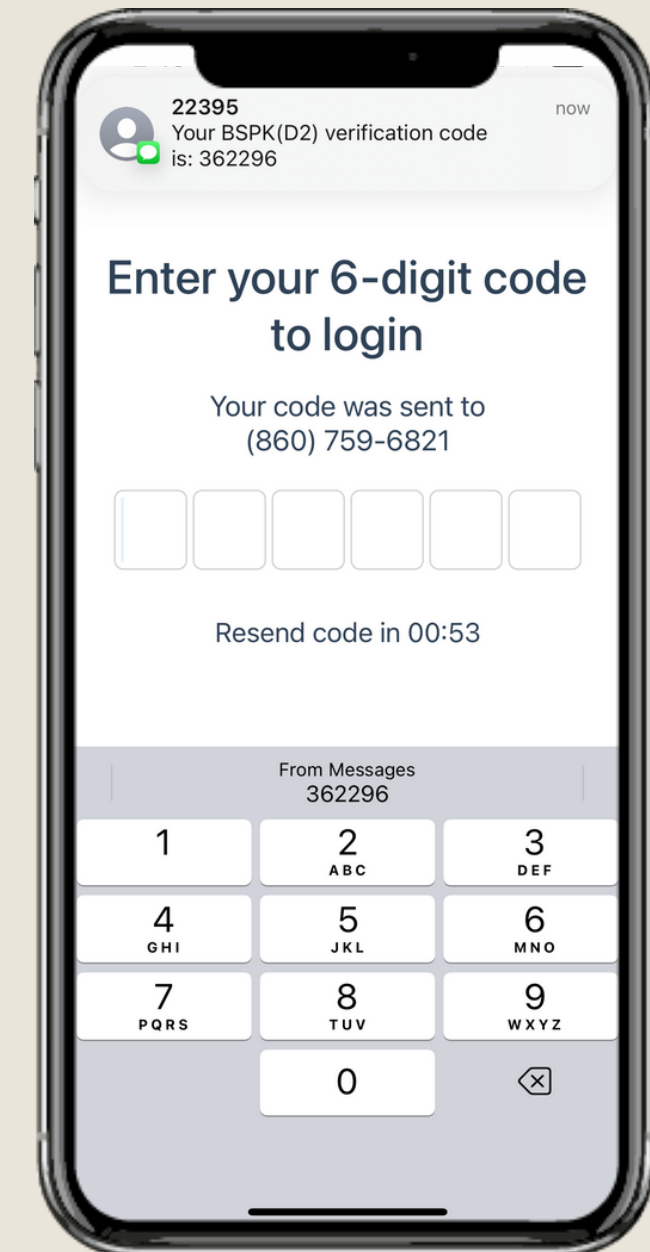
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Download the iOS app on your iPhone from the App Store [here](#)



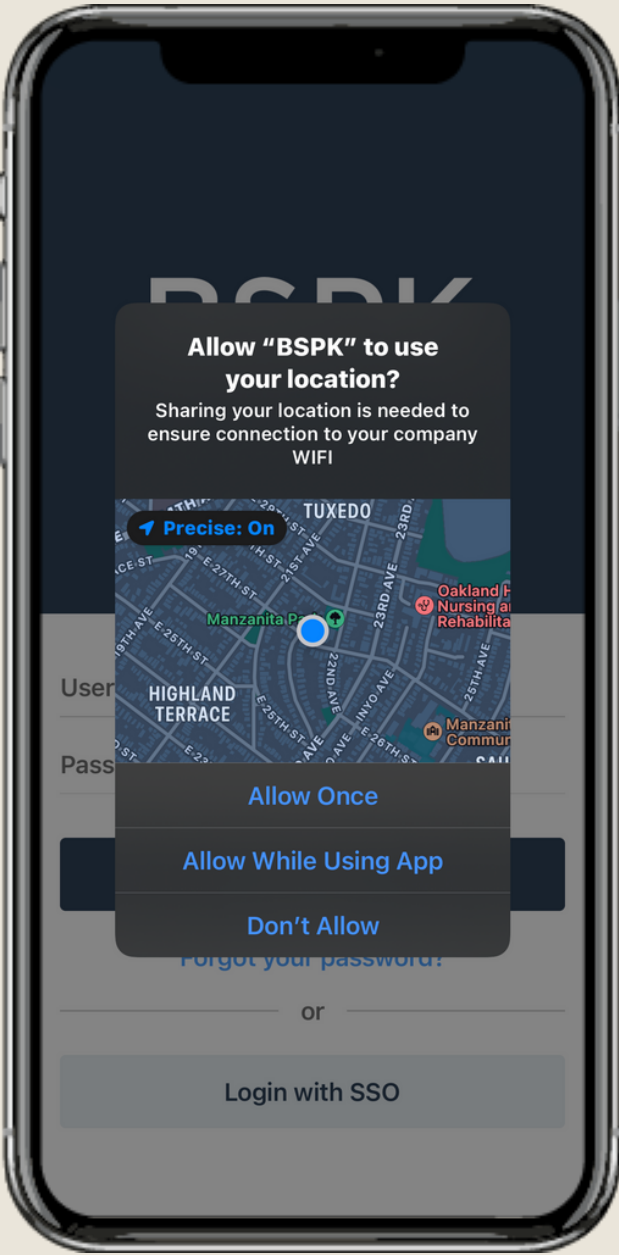
When you open the app, you will be prompted to enter your phone number



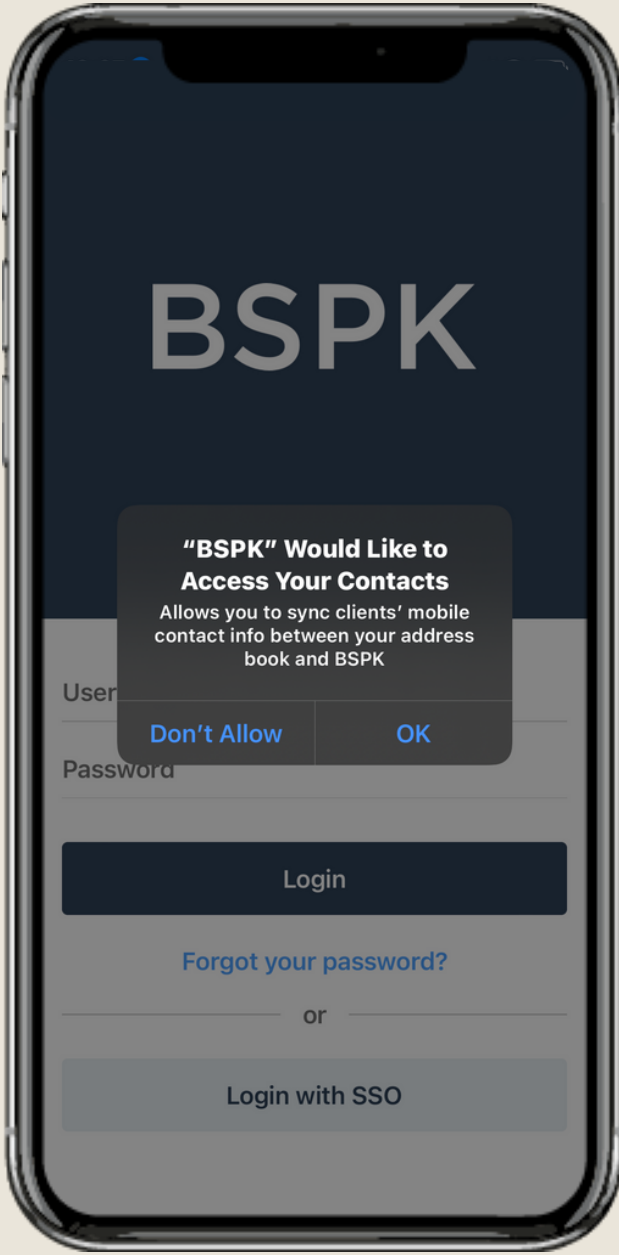
Enter the 6-digit code sent to your phone.

DOWNLOAD & SET UP

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Location: Choose "Allow while using app"



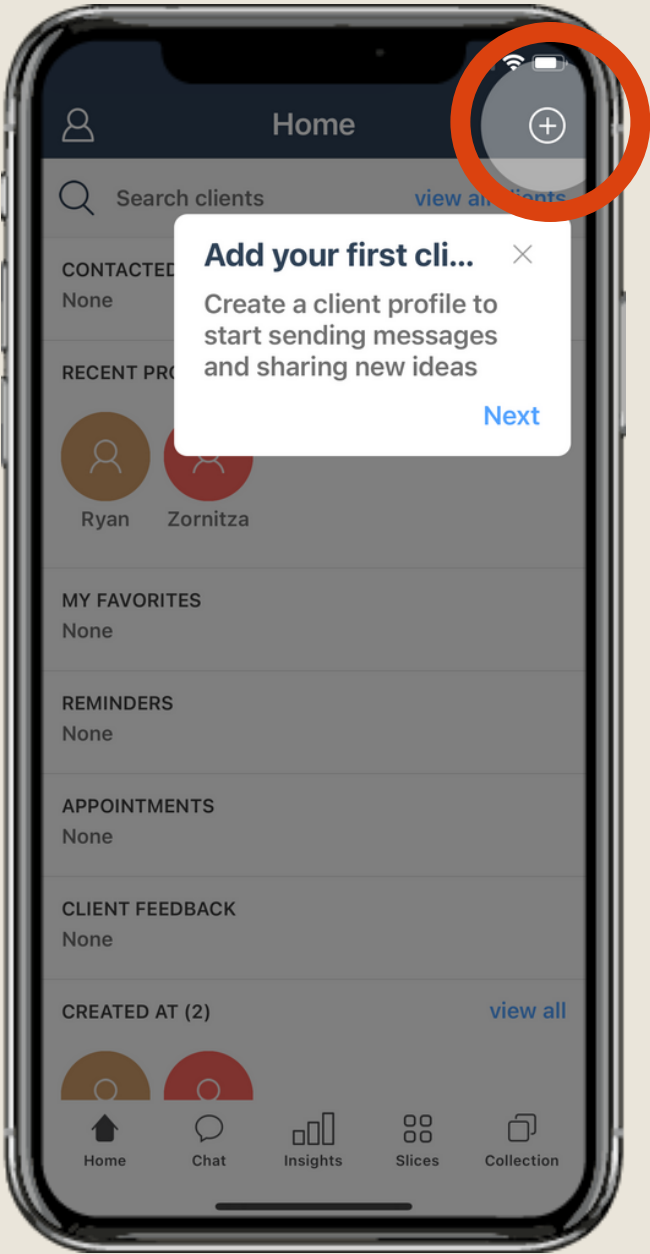
Contacts: Choose "OK" for BSPK to access your contacts



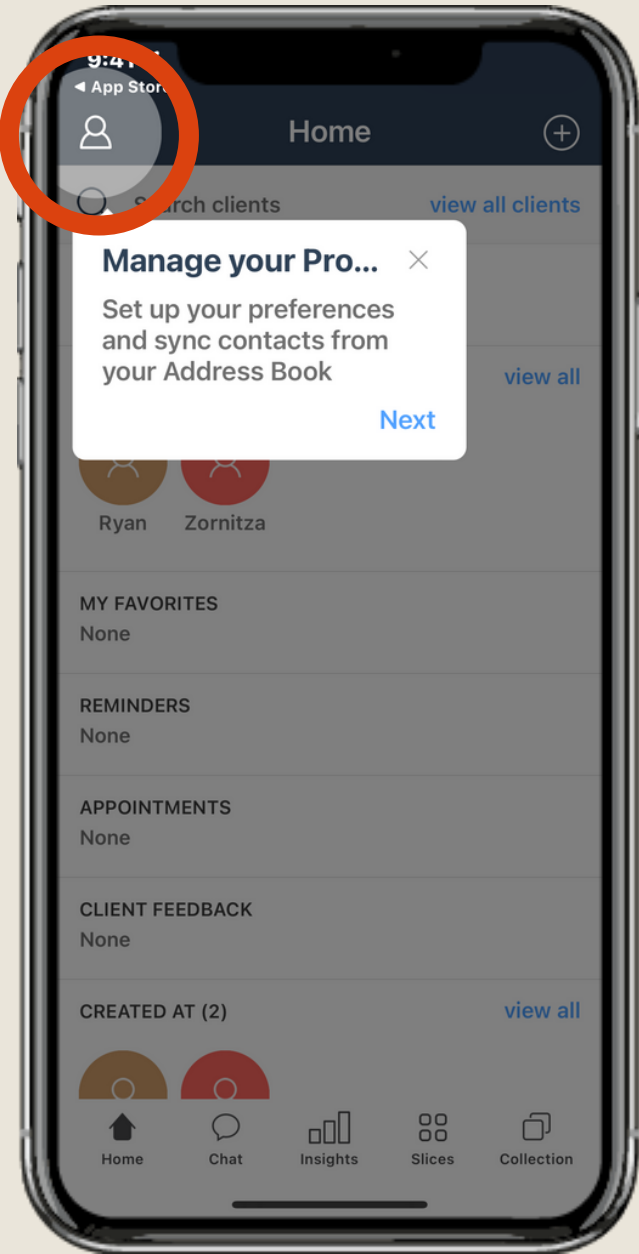
Notifications: Choose "OK" to receive notifications

DOWNLOAD & SET UP

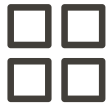
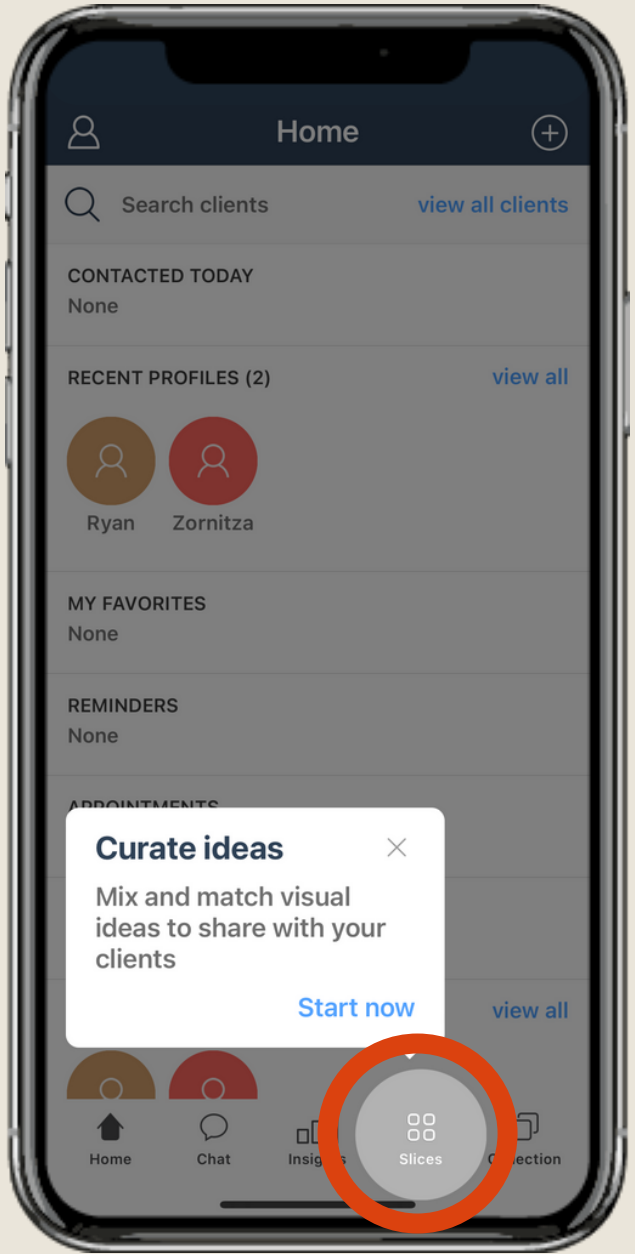
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Create a client profile with contact information and other important details



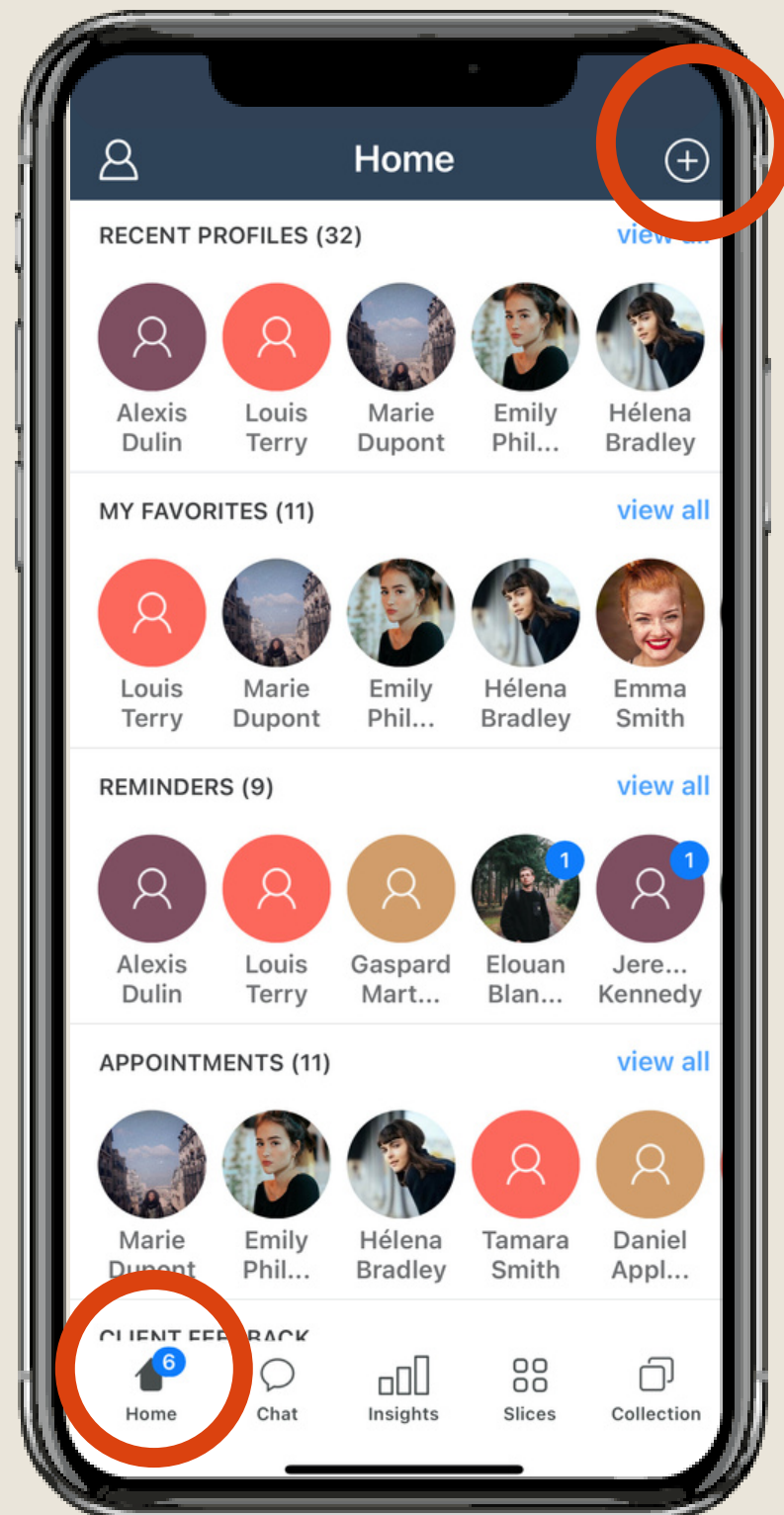
Manage your profile, set up your availability, and sync your contacts



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.

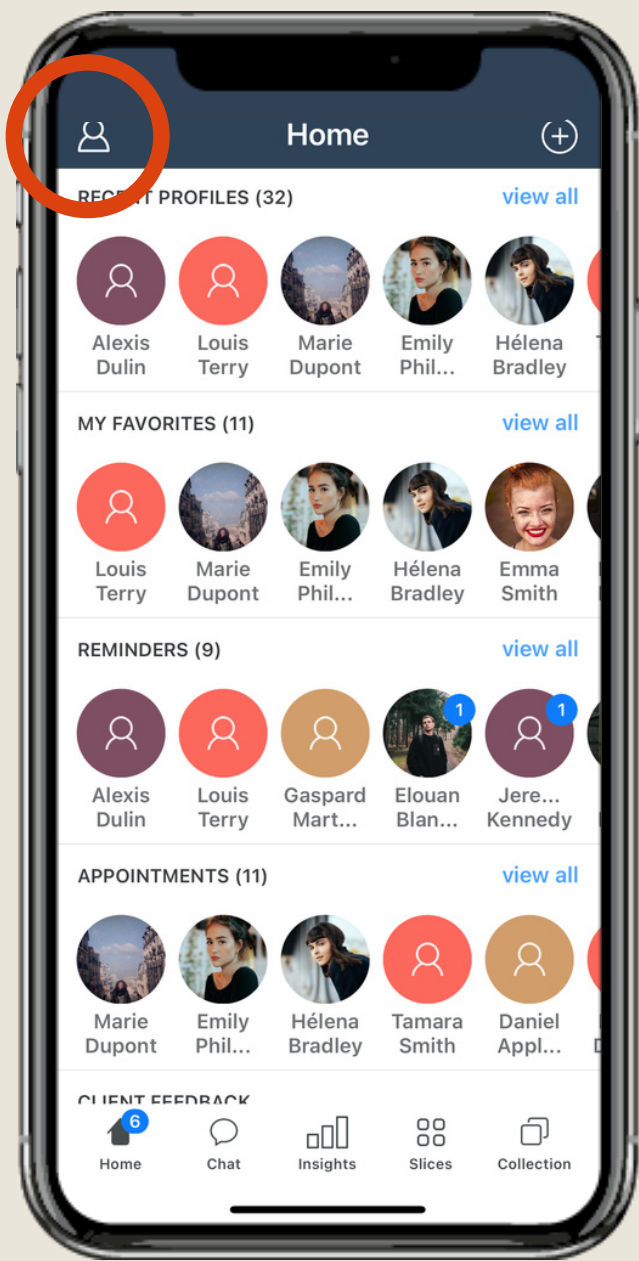


Use the plus button to access:

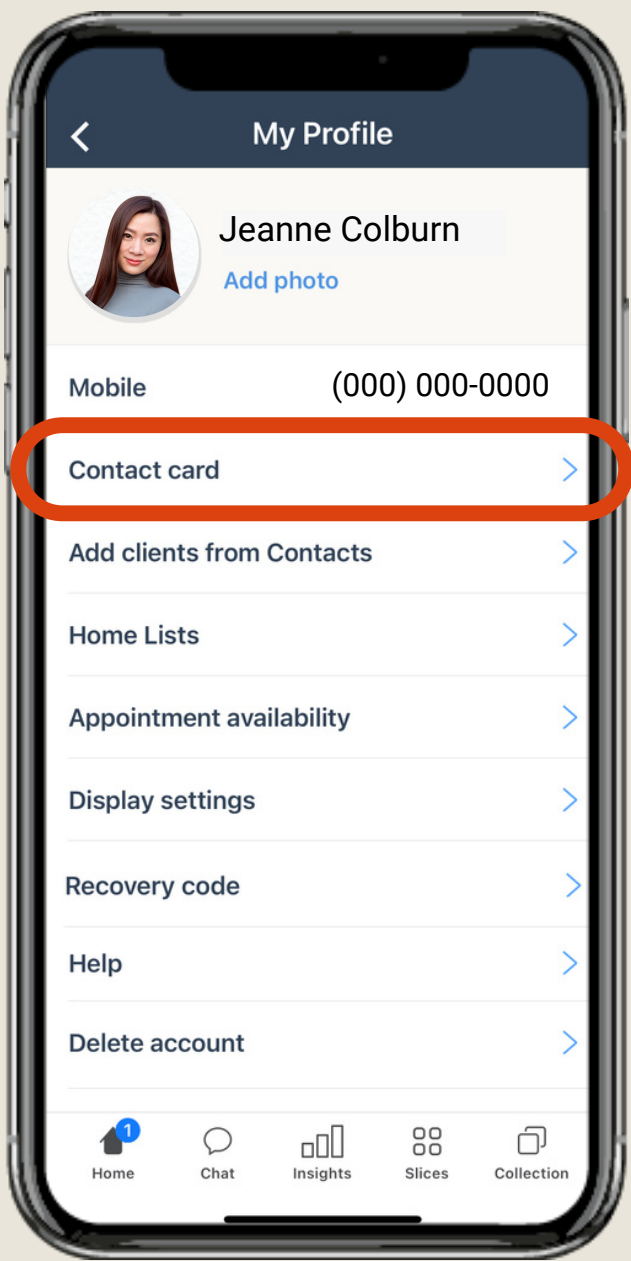
- Client Profile
- Client List
- Ideabook Post
- Appointment
- Reminder

MY PROFILE

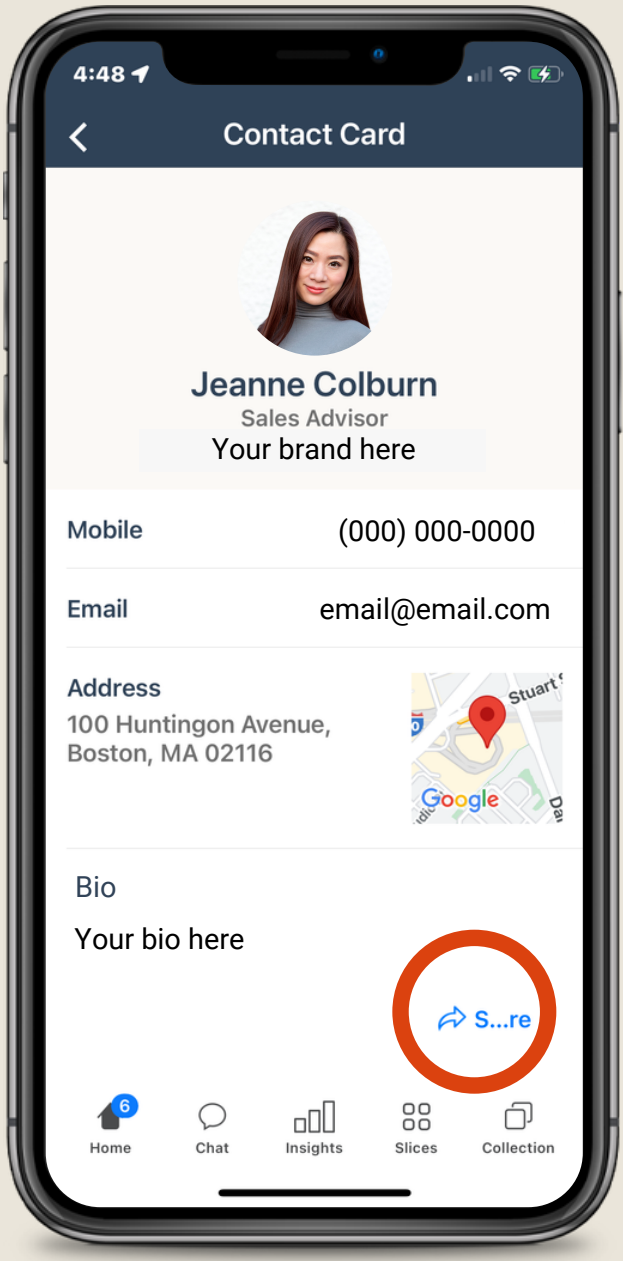
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Tap the profile icon to edit your BSPK profile.



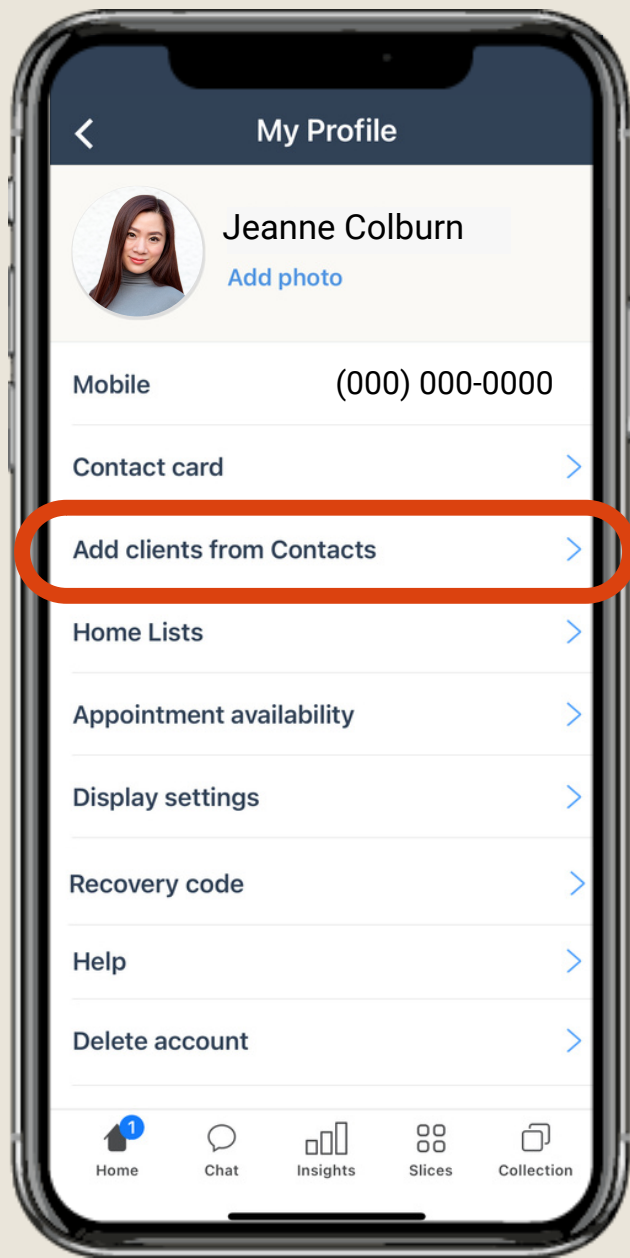
Use the contact card to share with clients



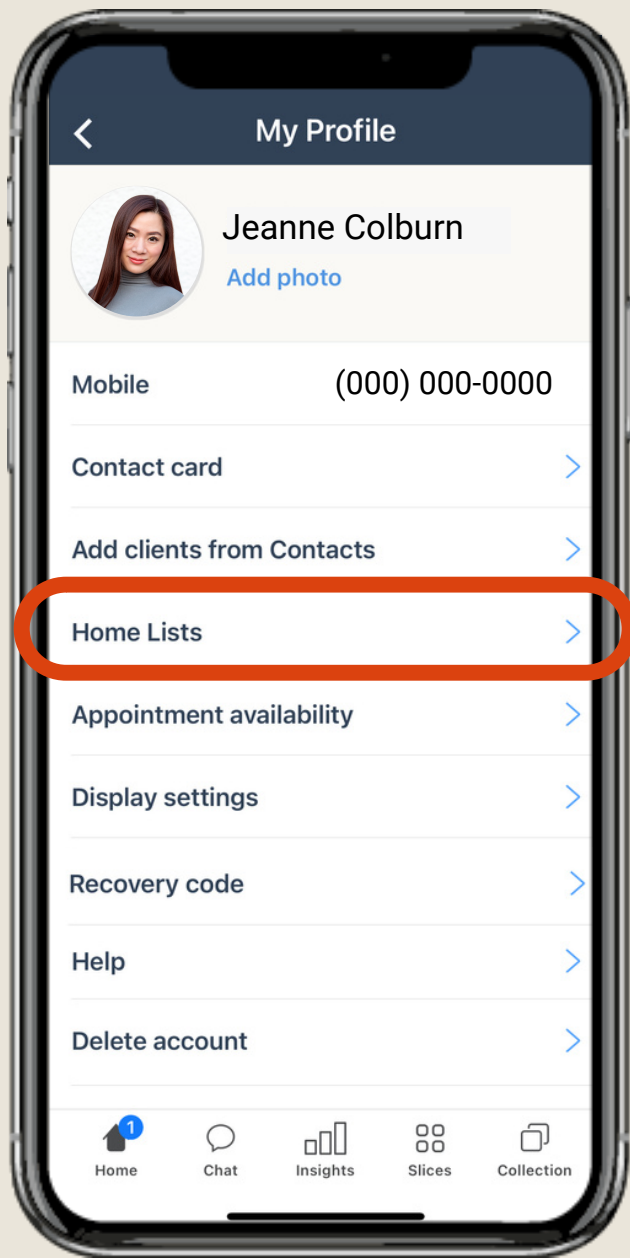
Easily share via SMS, WeChat, WhatsApp, and more

MY PROFILE- CONTACTS & LISTS

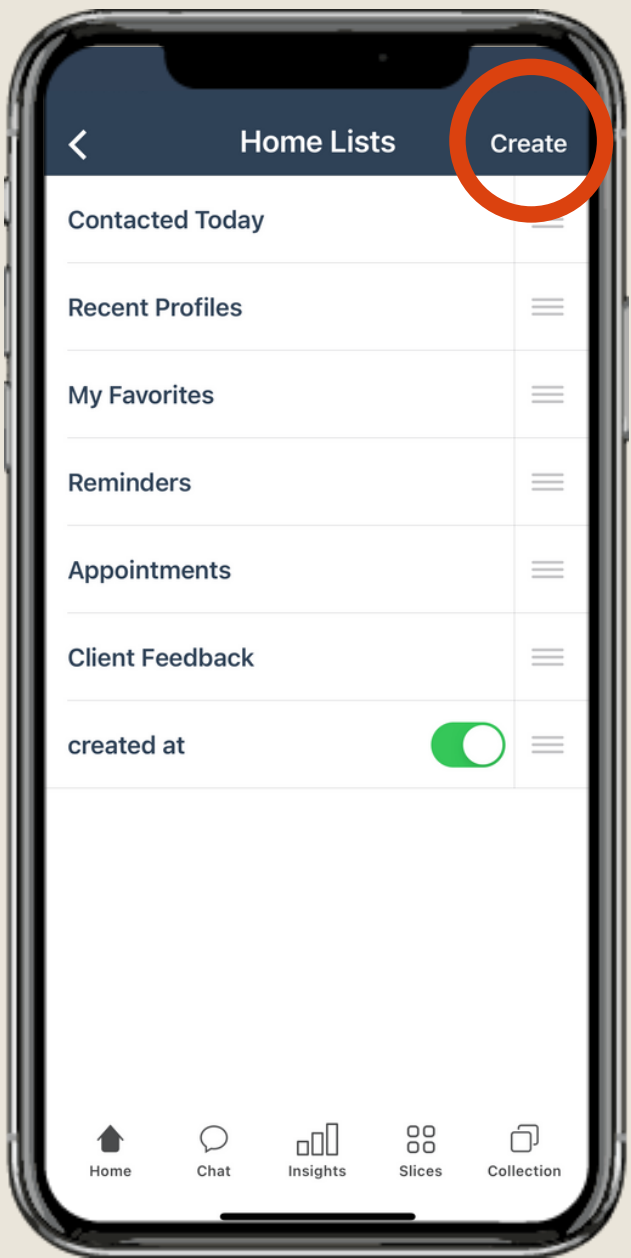
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Sync and add clients from your phone contacts.



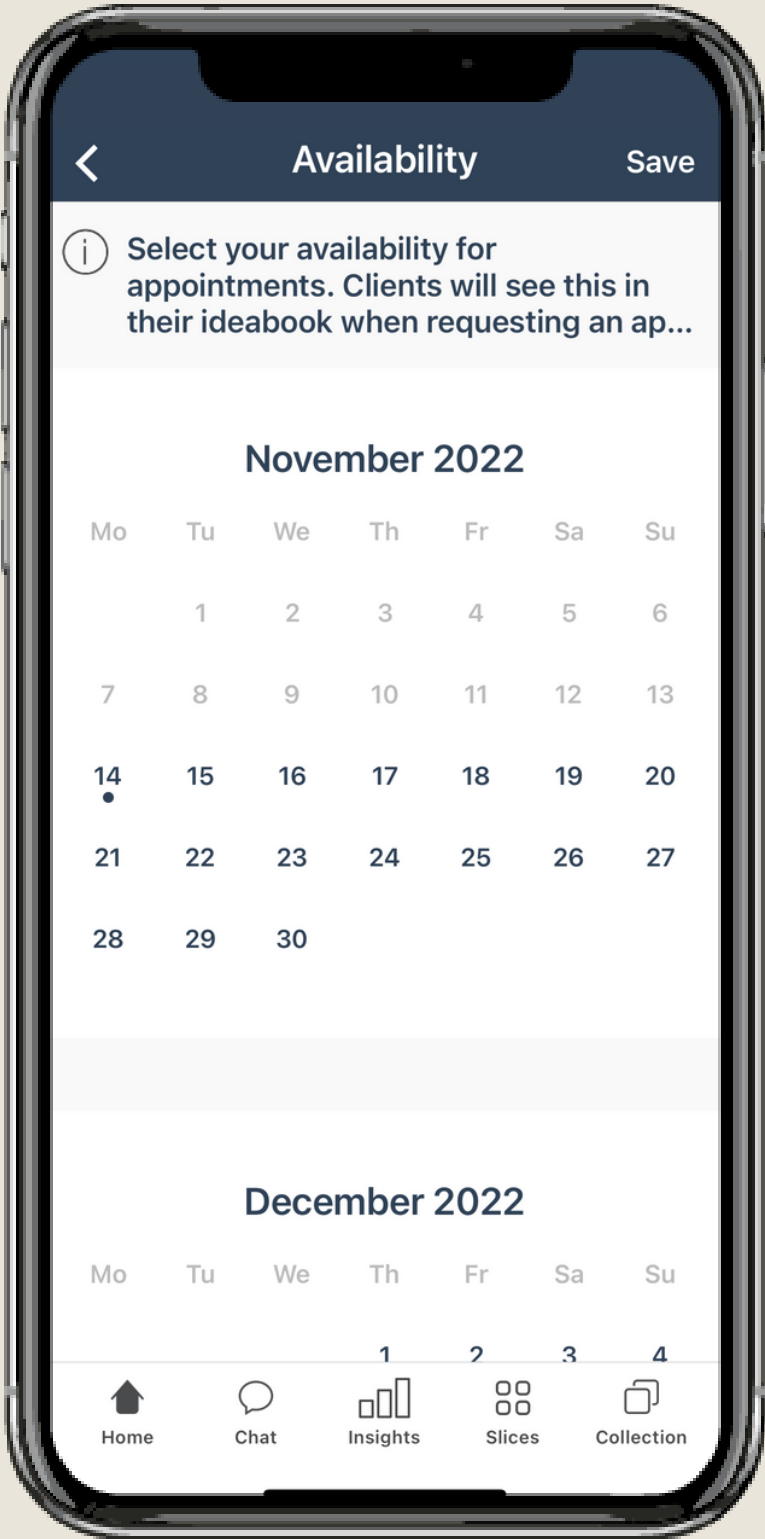
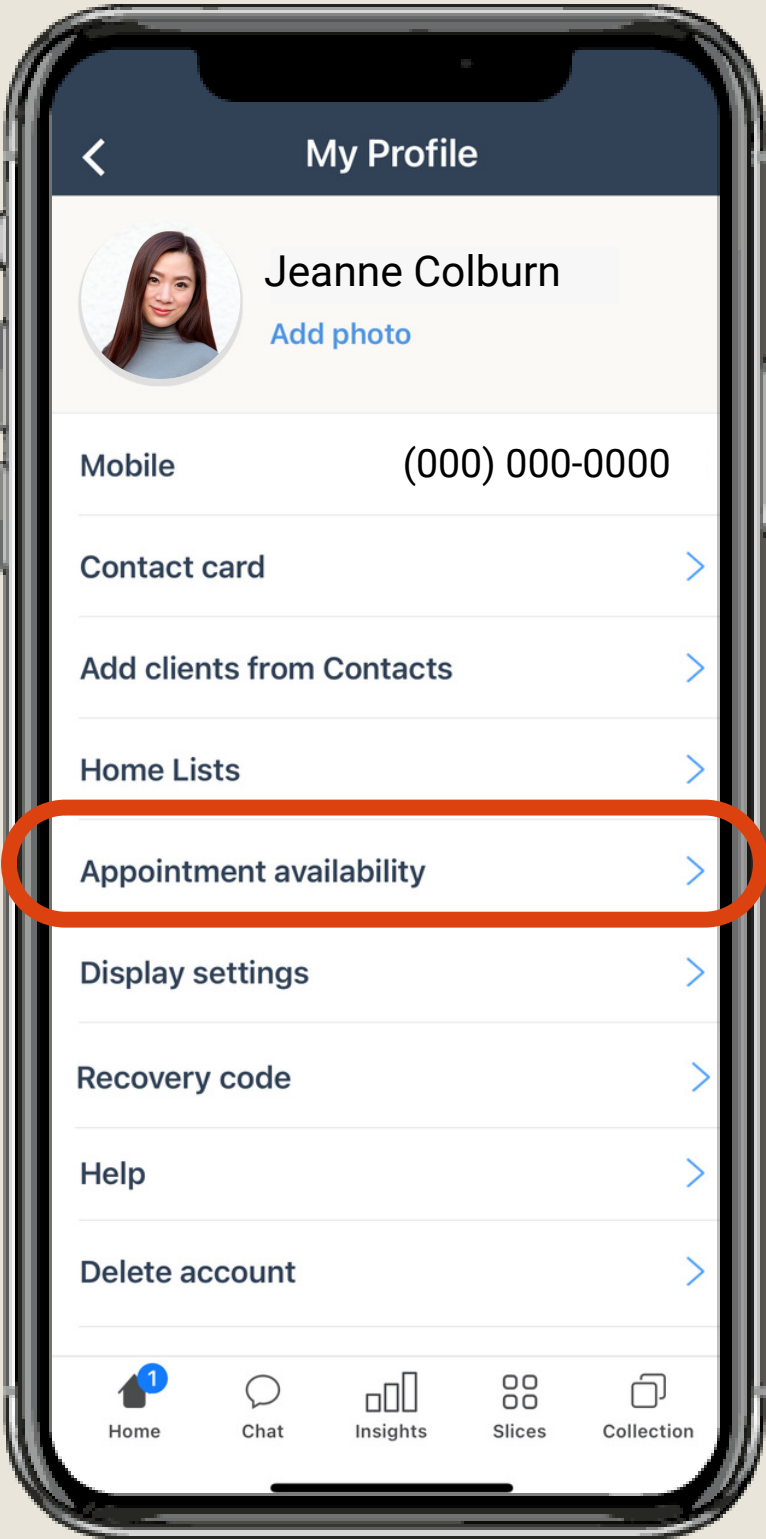
View and create client lists that are displayed on the home screen.



Create new client lists and organize your current ones.

MY PROFILE - APPOINTMENT AVAILABILITY

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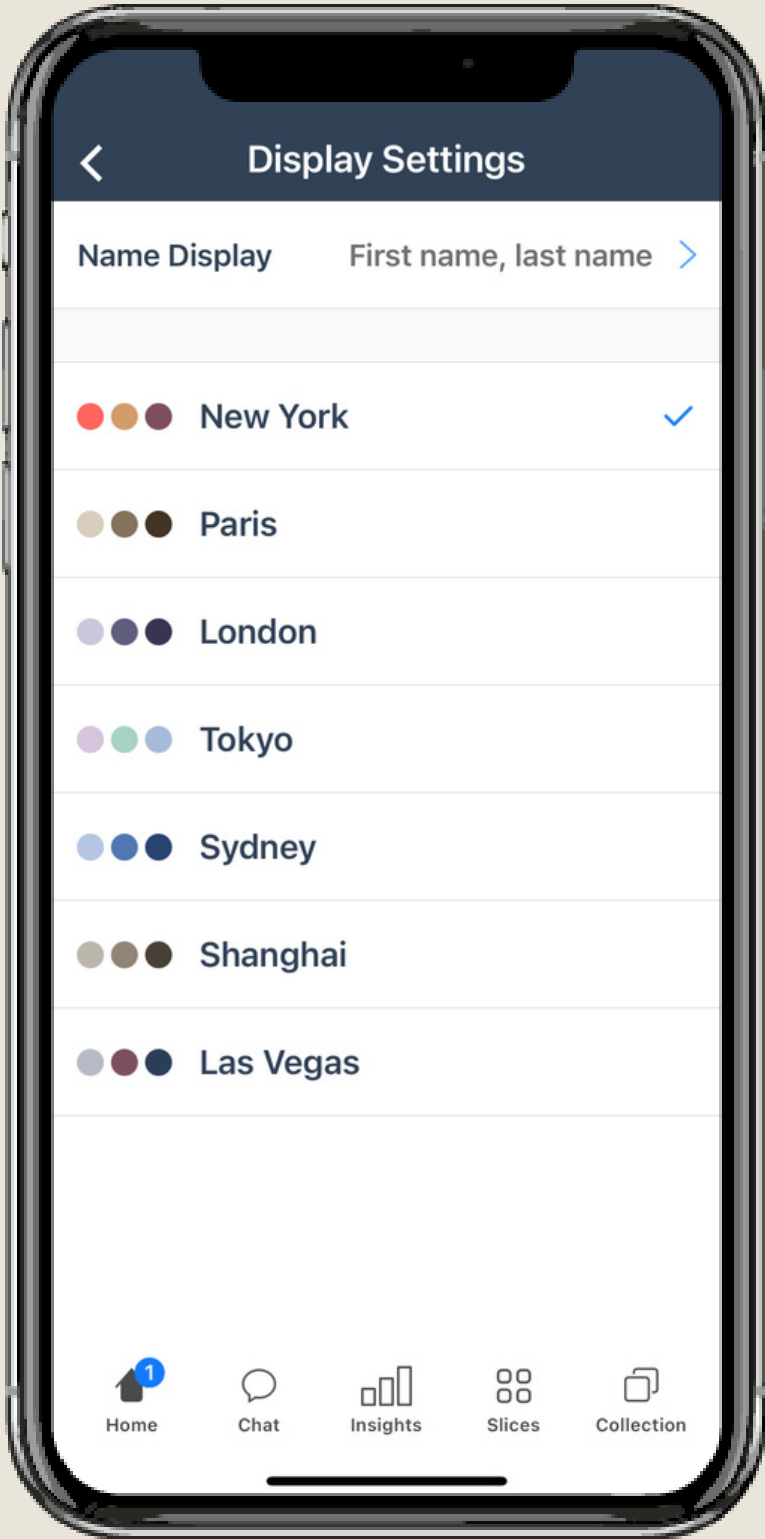
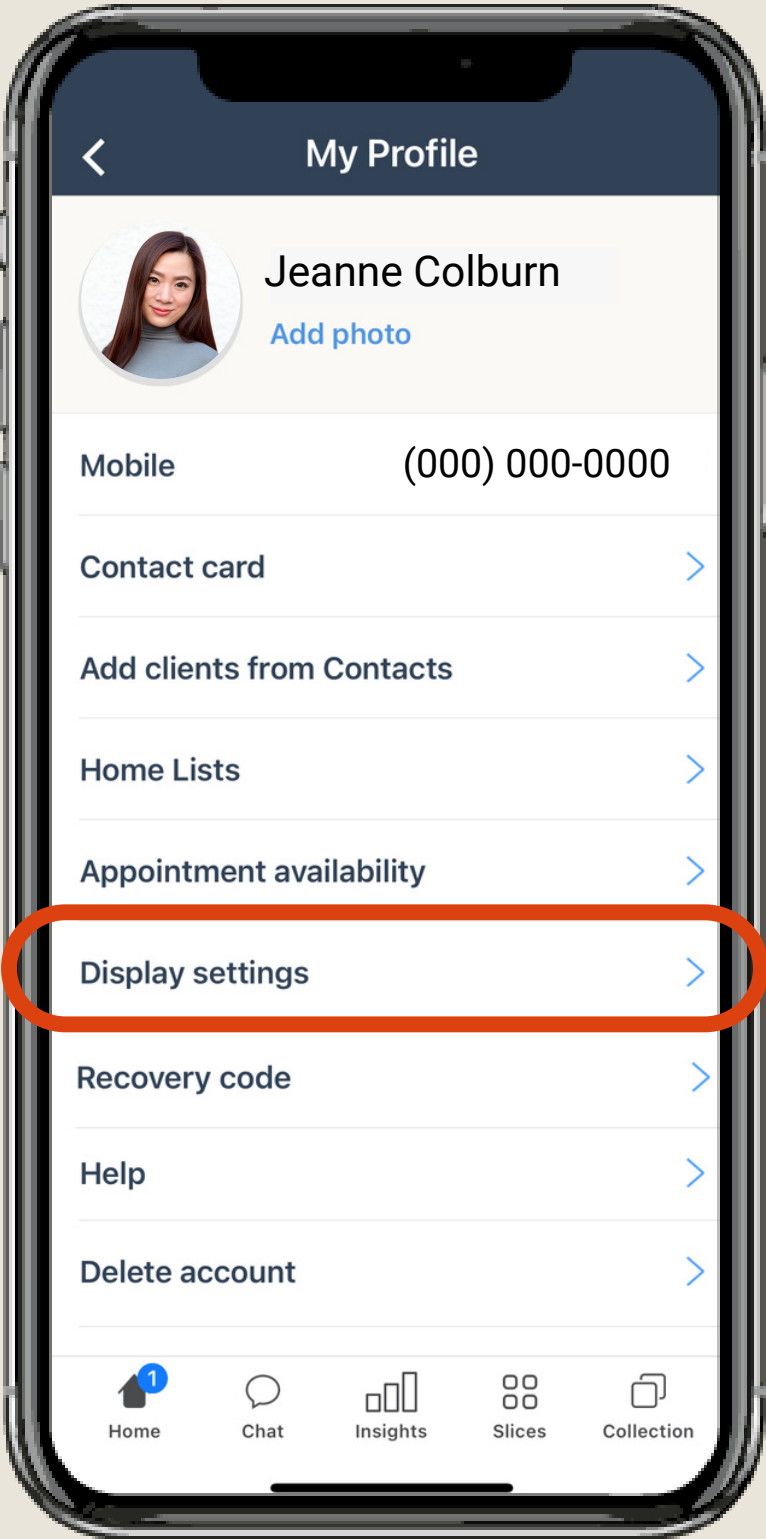


Tap Appointment availability and select your time availability to meet with your clients.

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

MY PROFILE - DISPLAY SETTINGS

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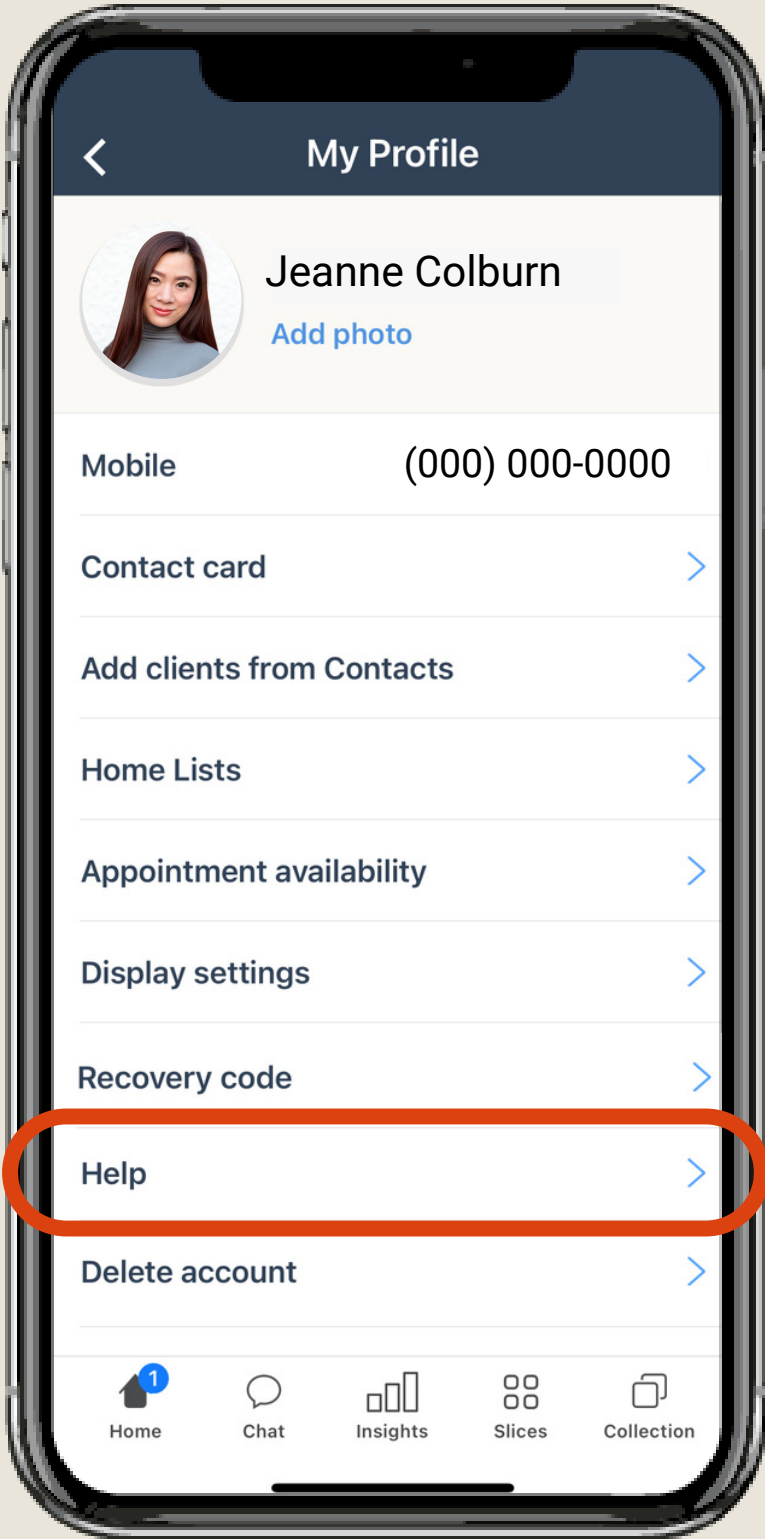
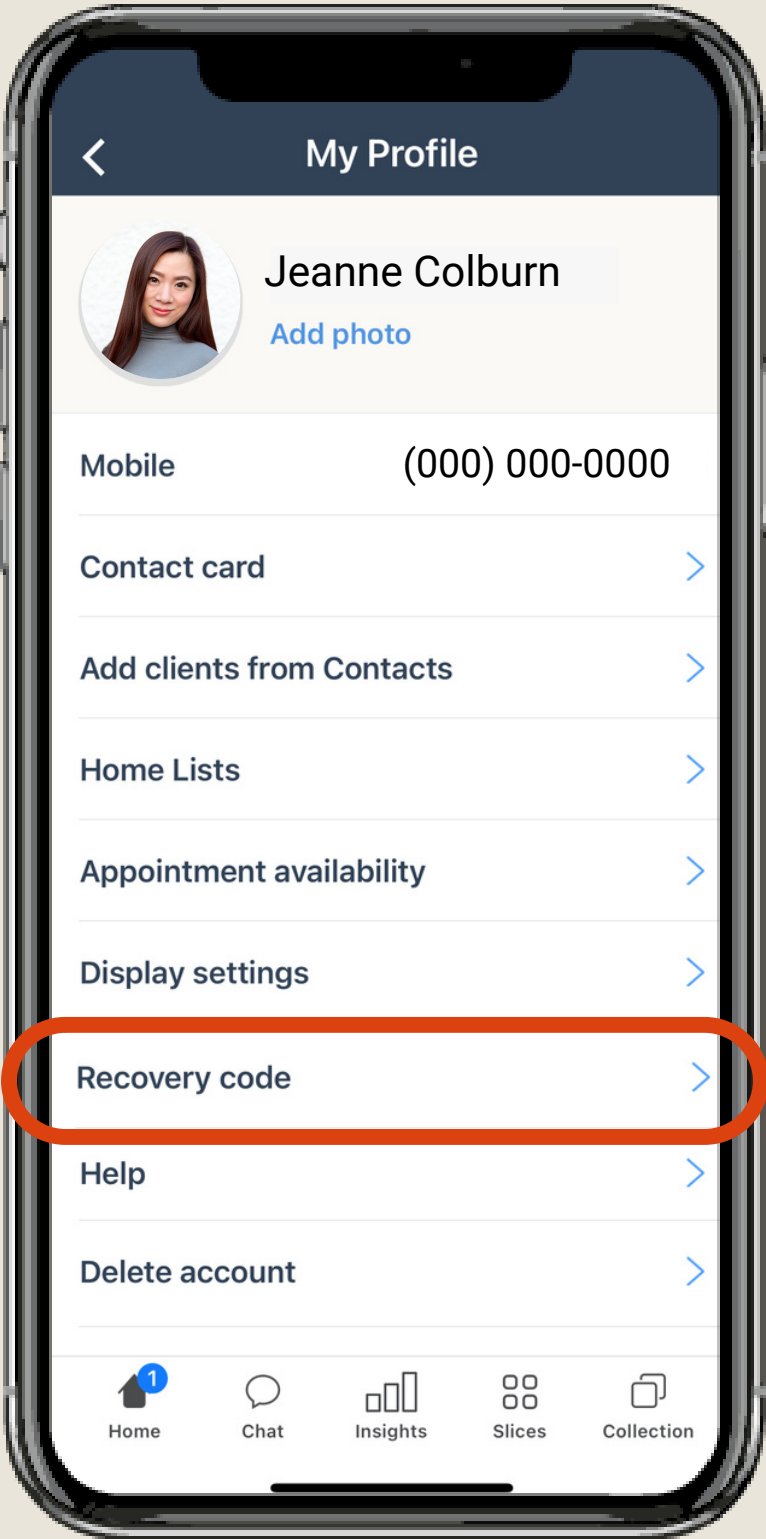


Choose amongst a list of different theme colors in the app.

Choose how you want client names to be displayed.

MY PROFILE - RECOVERY CODE & HELP

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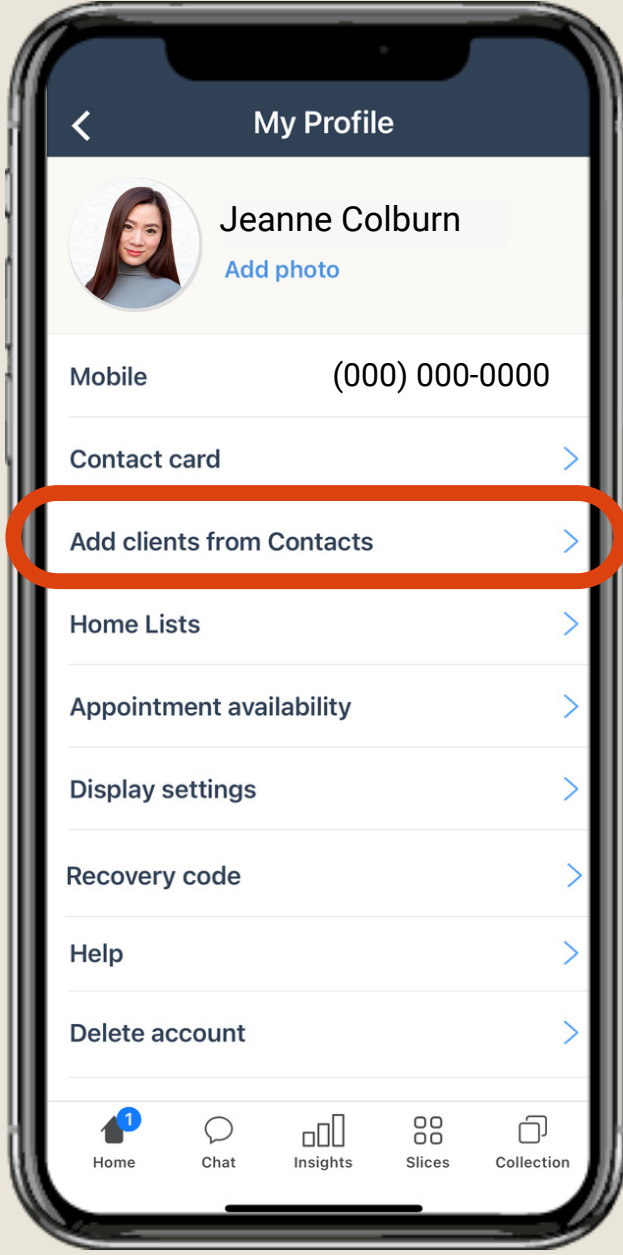
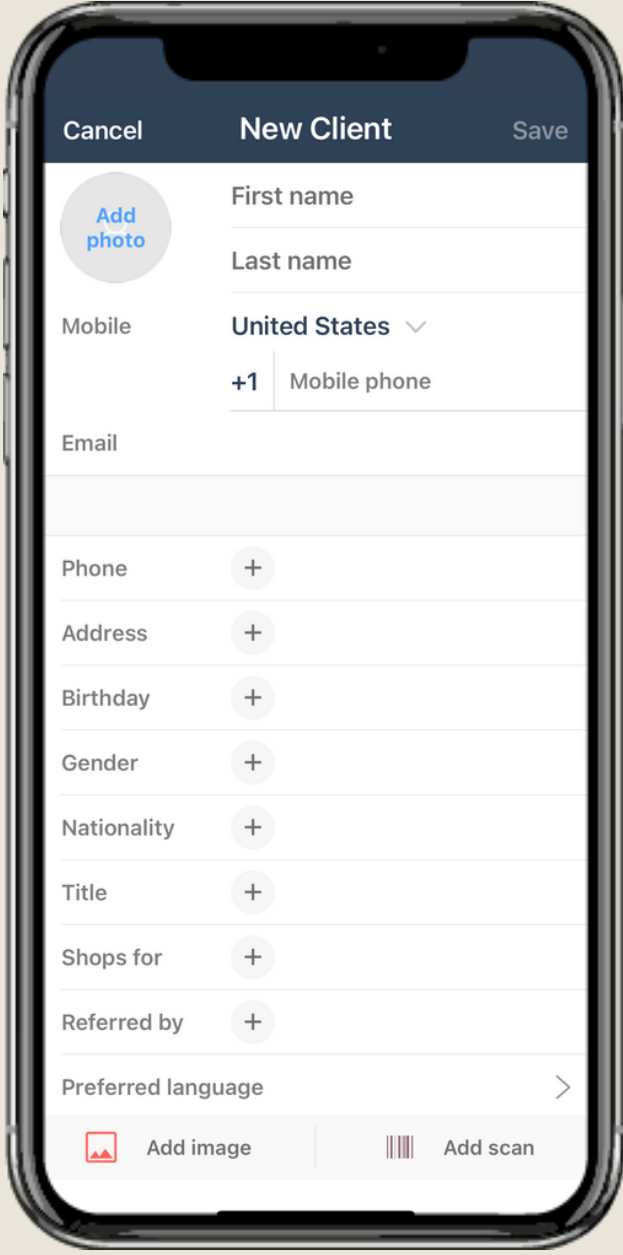
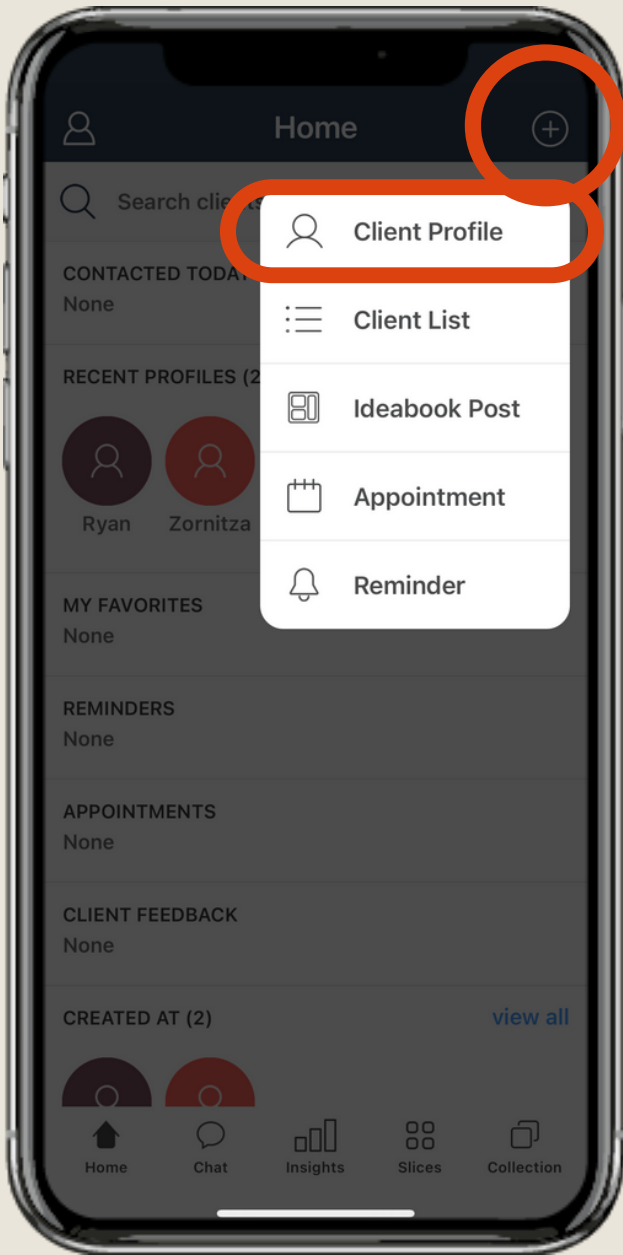
View your recovery code, save this in case you need to use it to log back into the app.



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.



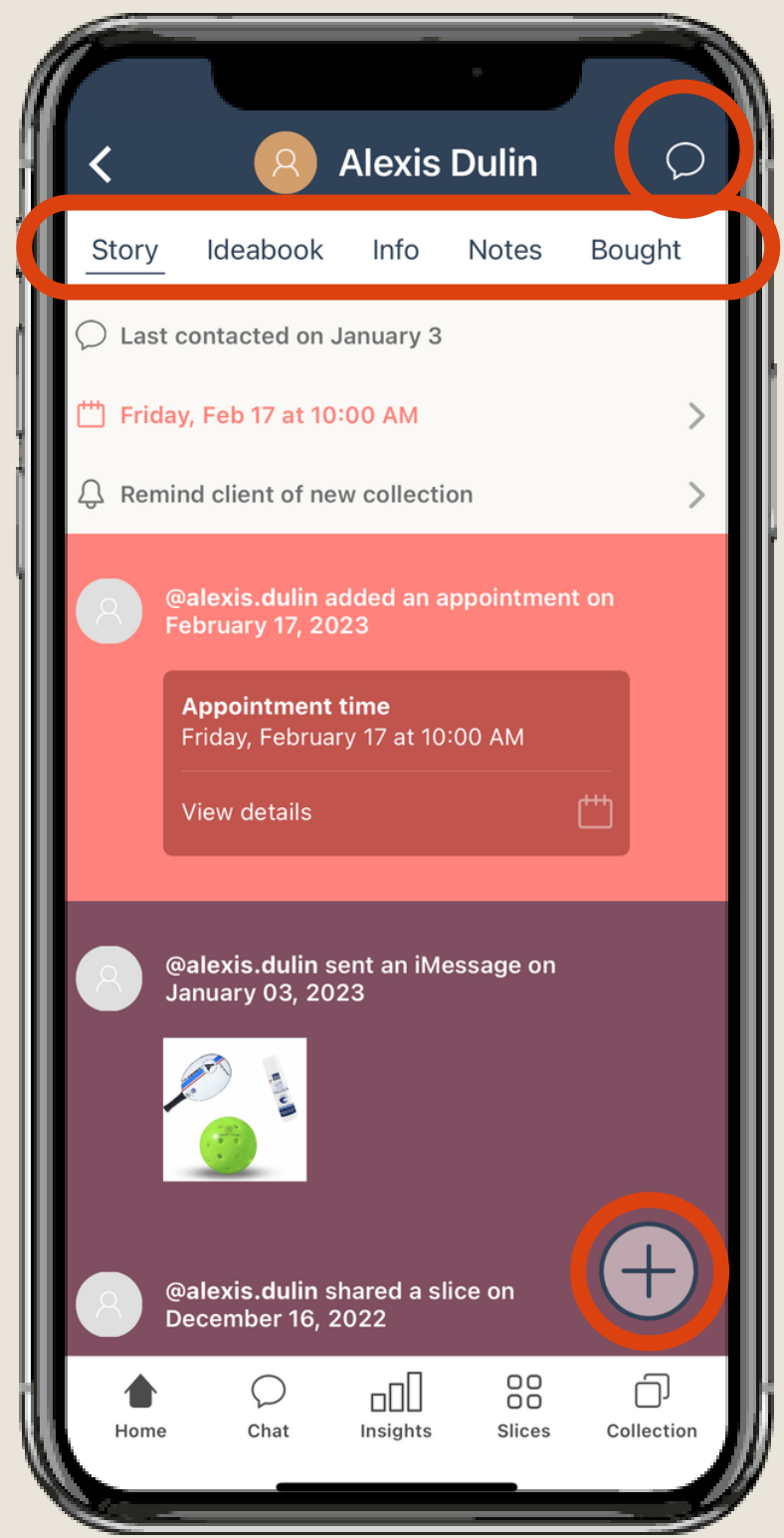
On the "New Client" screen, you can fill out the client's information and get contact consent.



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

INSIDE A CLIENT PROFILE

BSPK



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

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



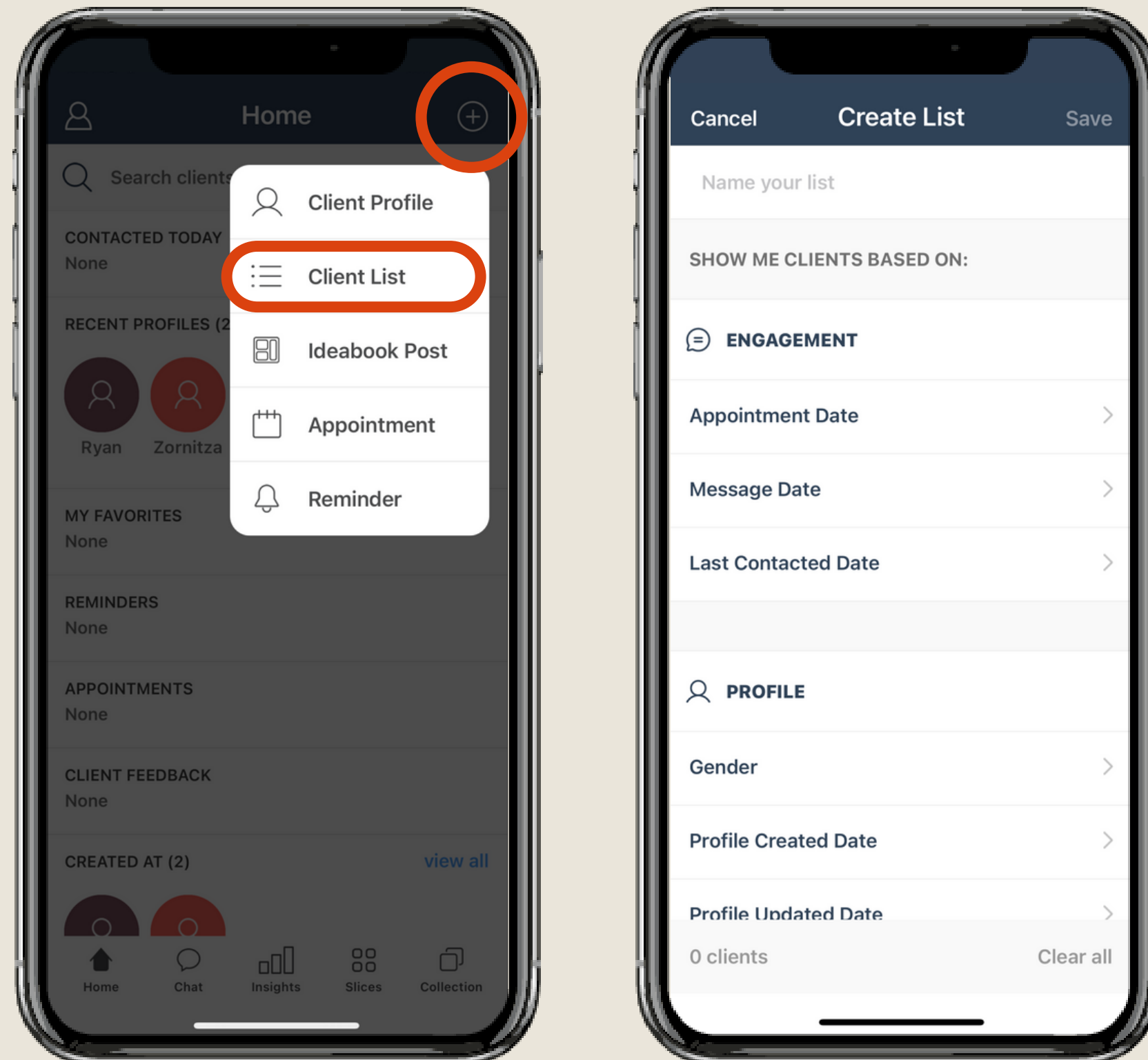
Use the info button to update the client's information.

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

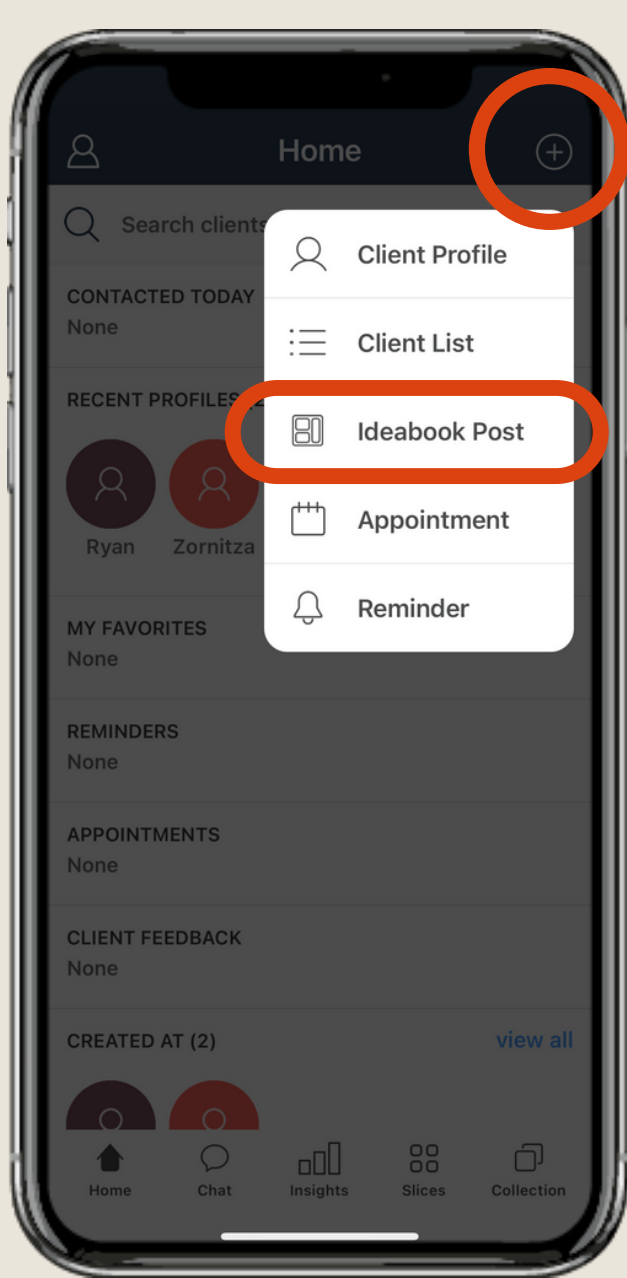
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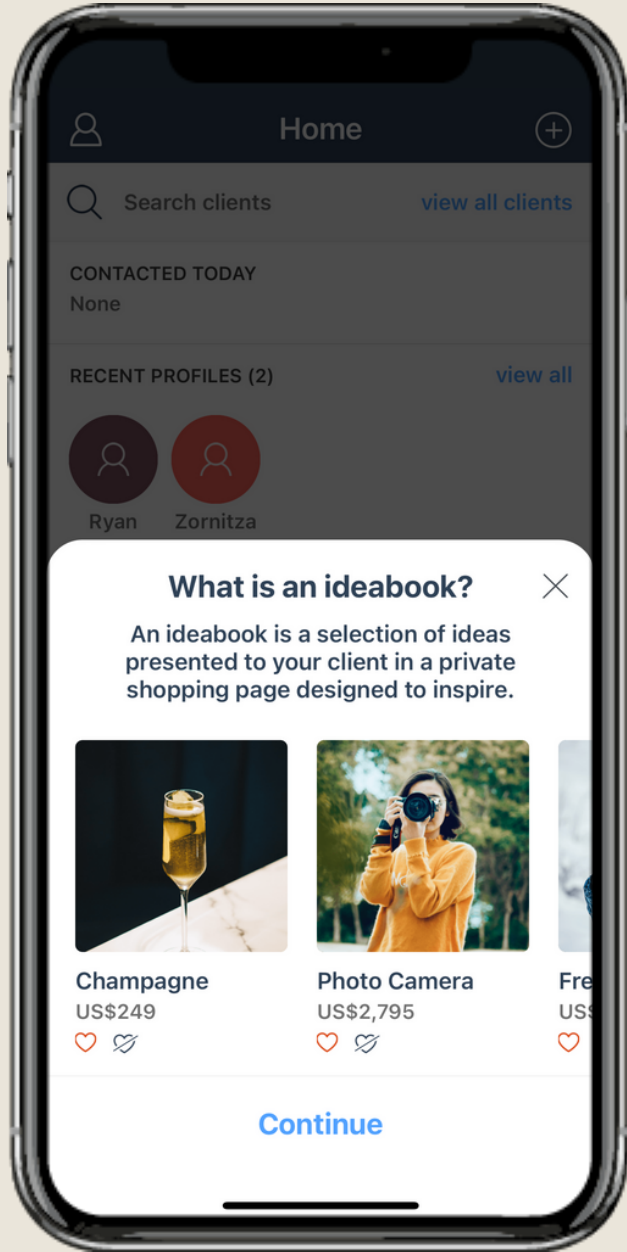
Organize your clients into lists based on client information like engagement, profile characteristics, and more.

CREATE AN IDEABOOK POST

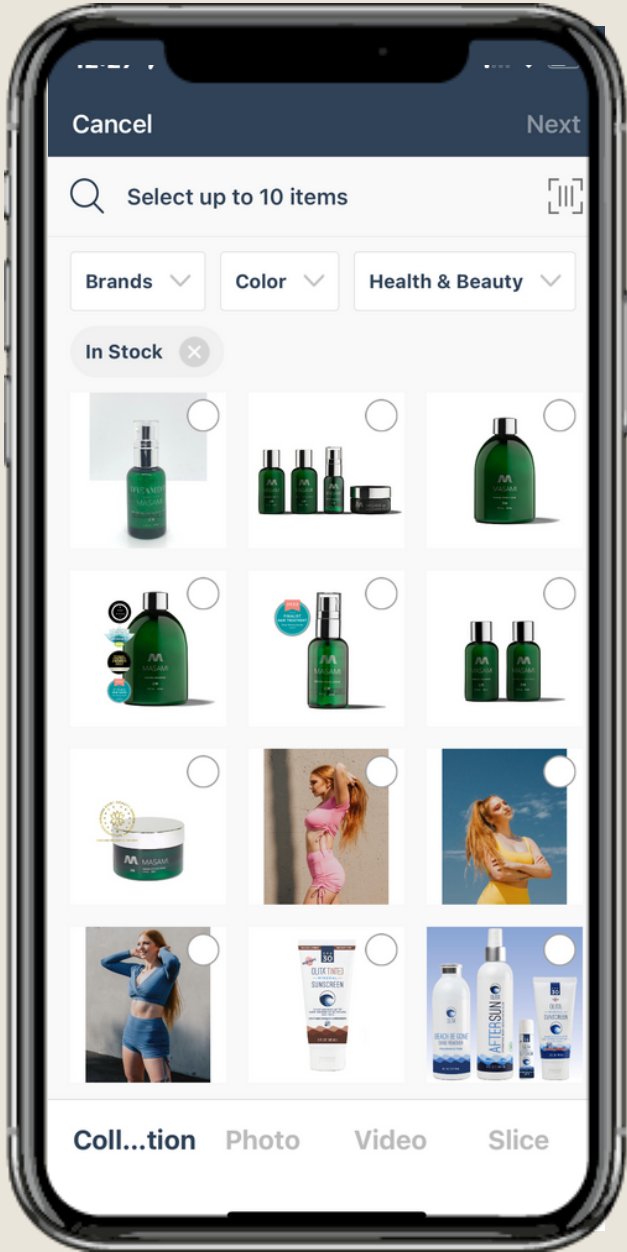
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Select "Ideabook Post" to curate a selection of products to send to your client.



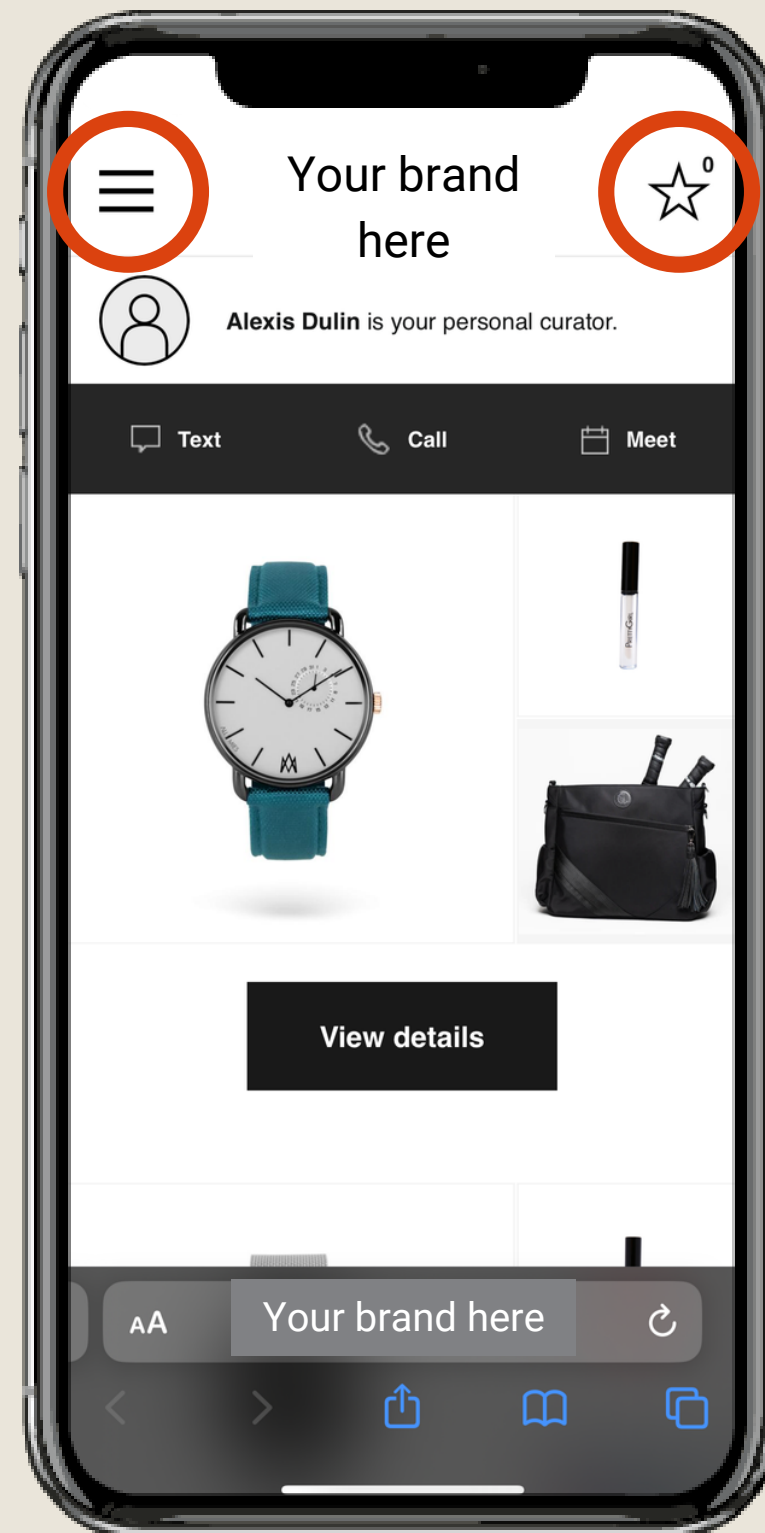
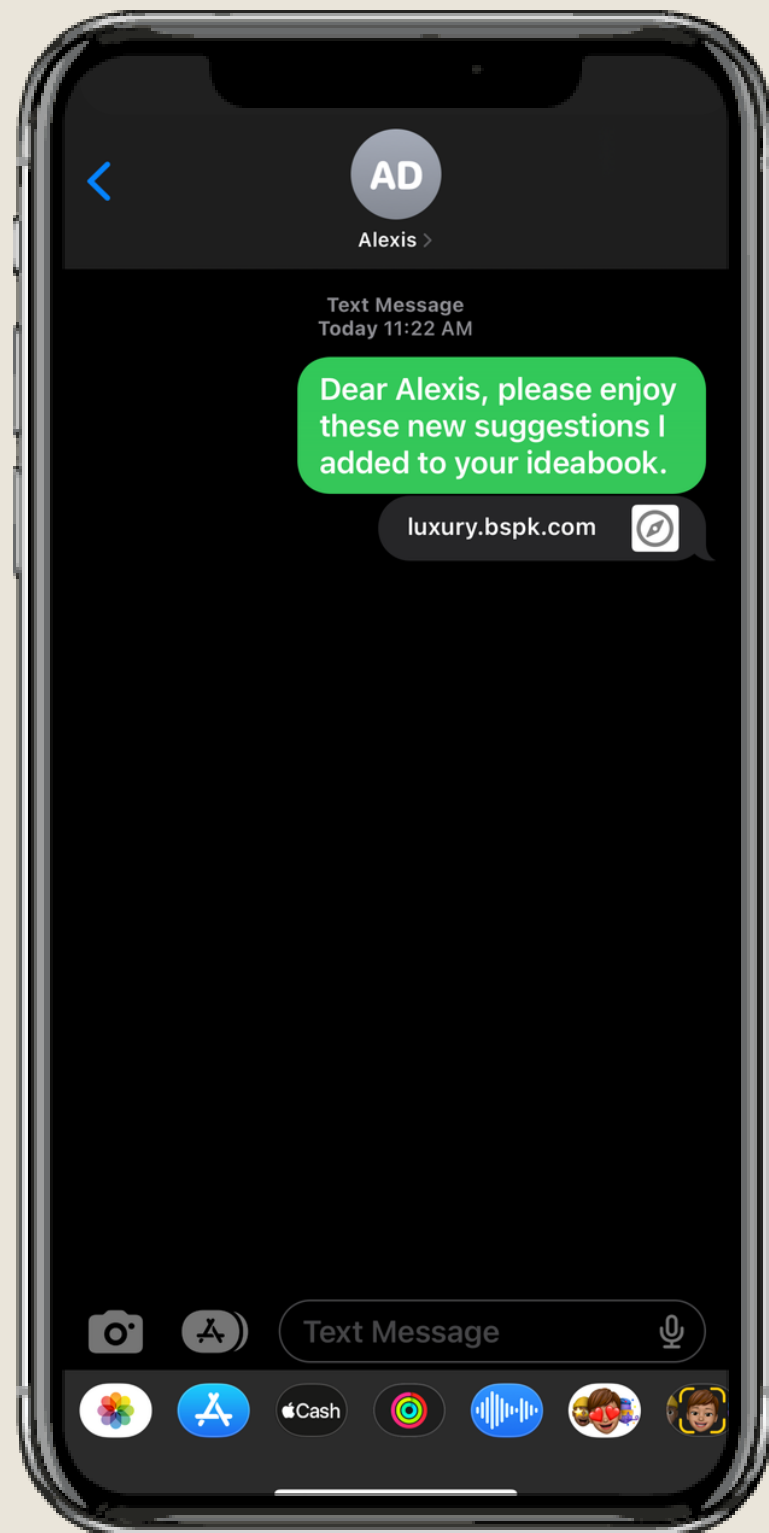
Share a selection of products directly with your client via a private shopping page.



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.

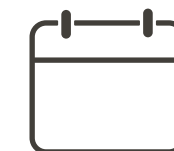
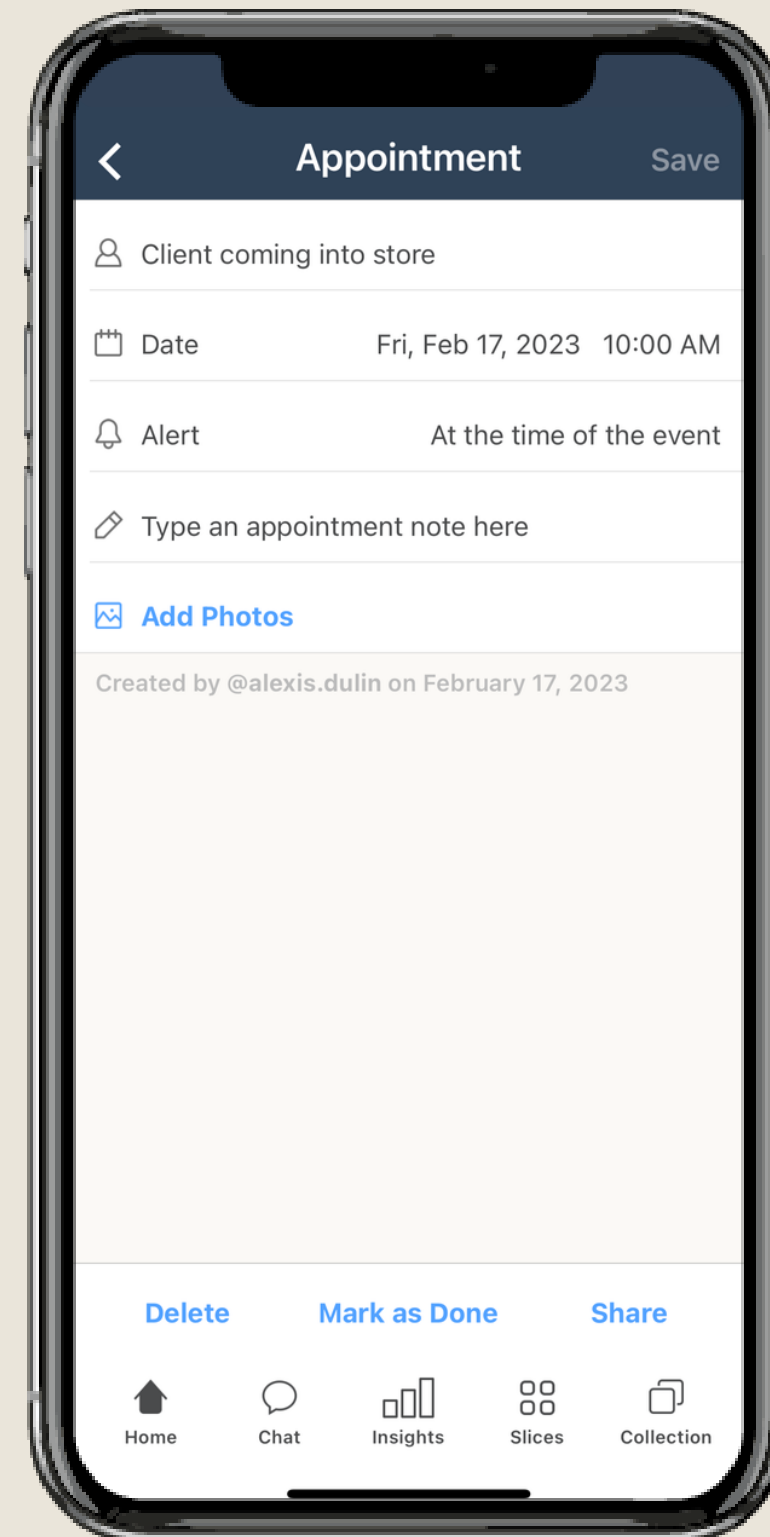
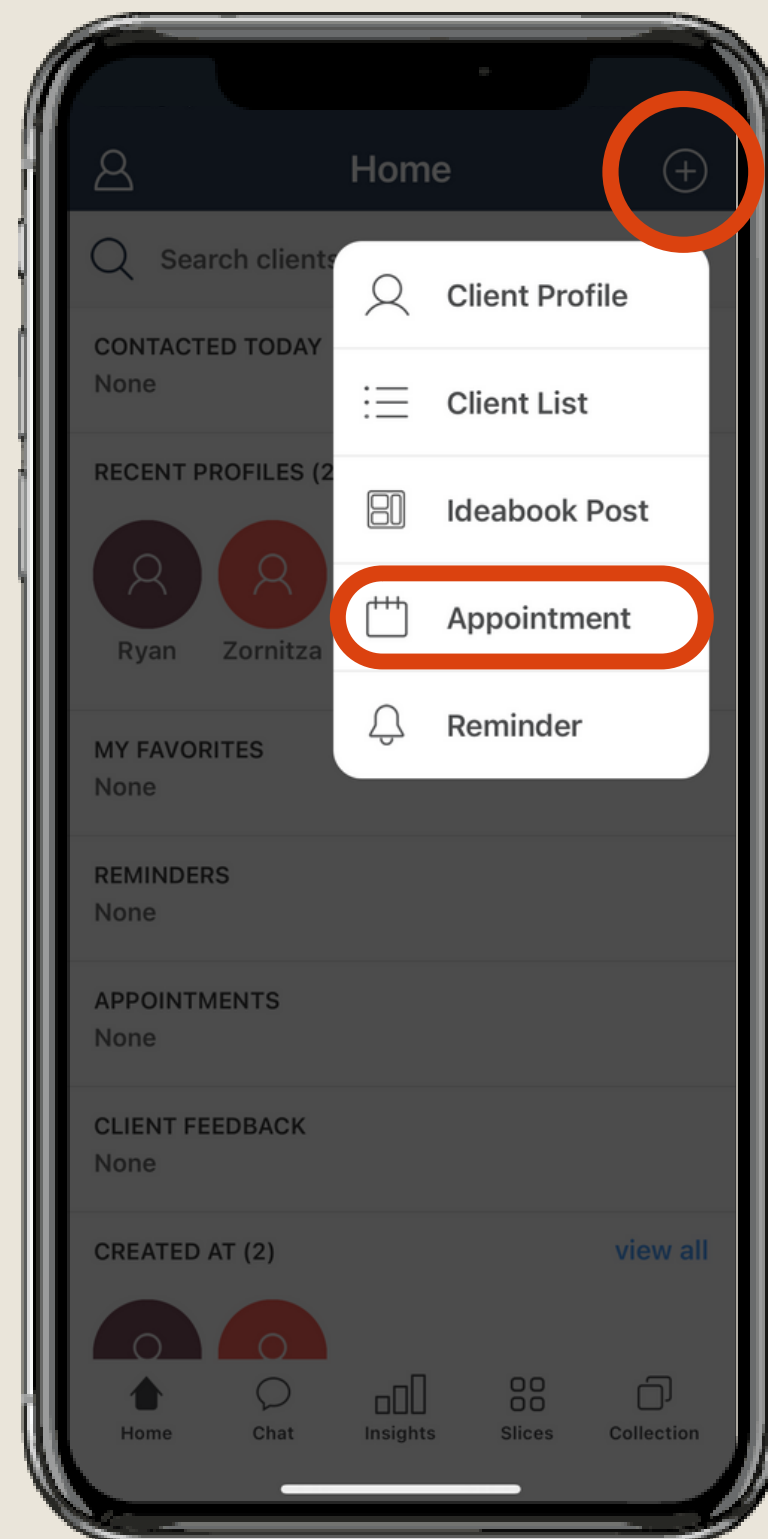
Clients can then view product details, message, call, make an appointment with you.

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

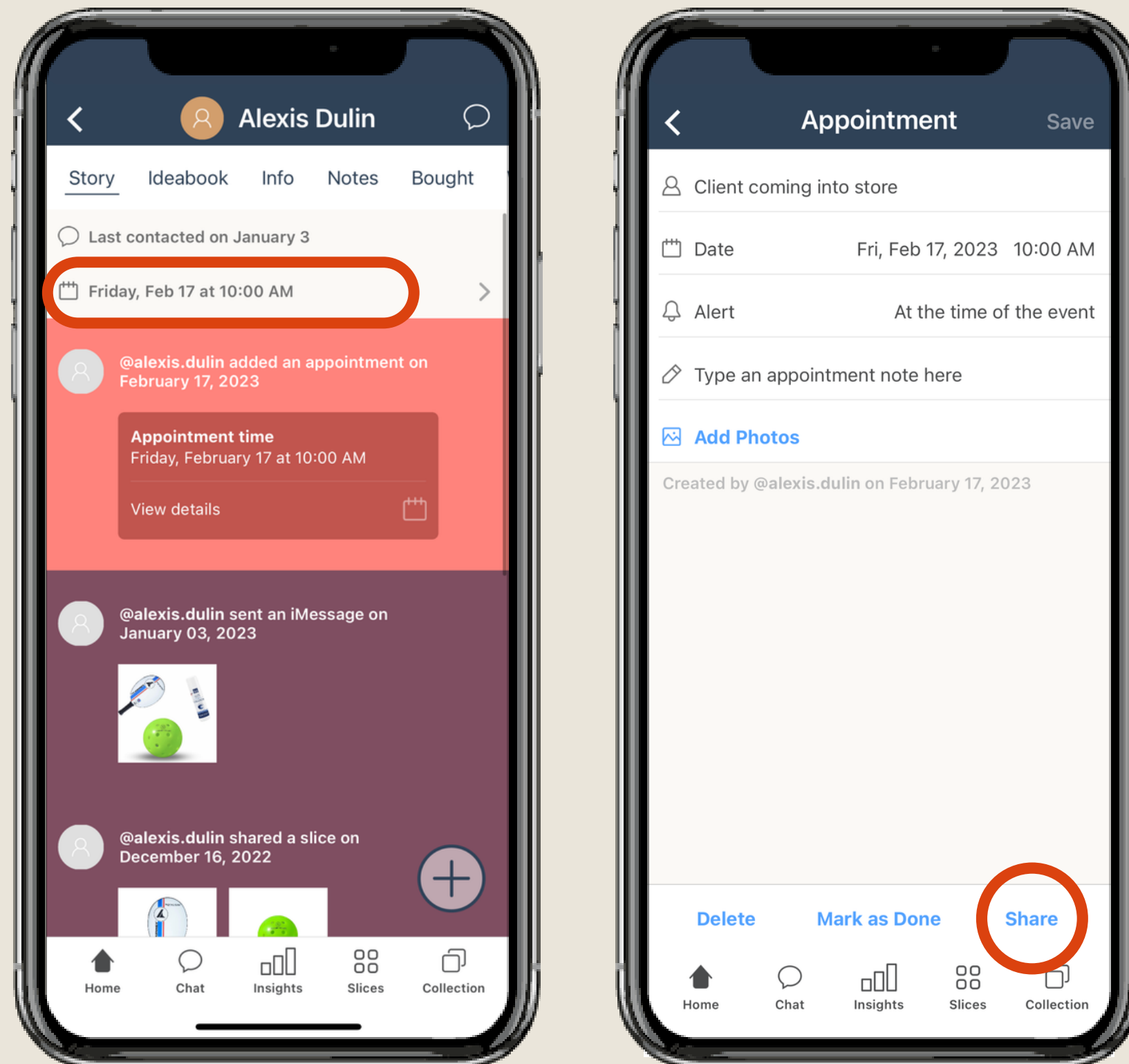


Tap “Appointment” in the menu on the home screen or from a client profile and select your client from your contact list.

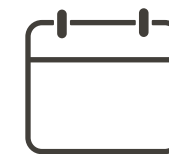
Fill out the appointment information and save.

CREATE AN APPOINTMENT CONT.

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

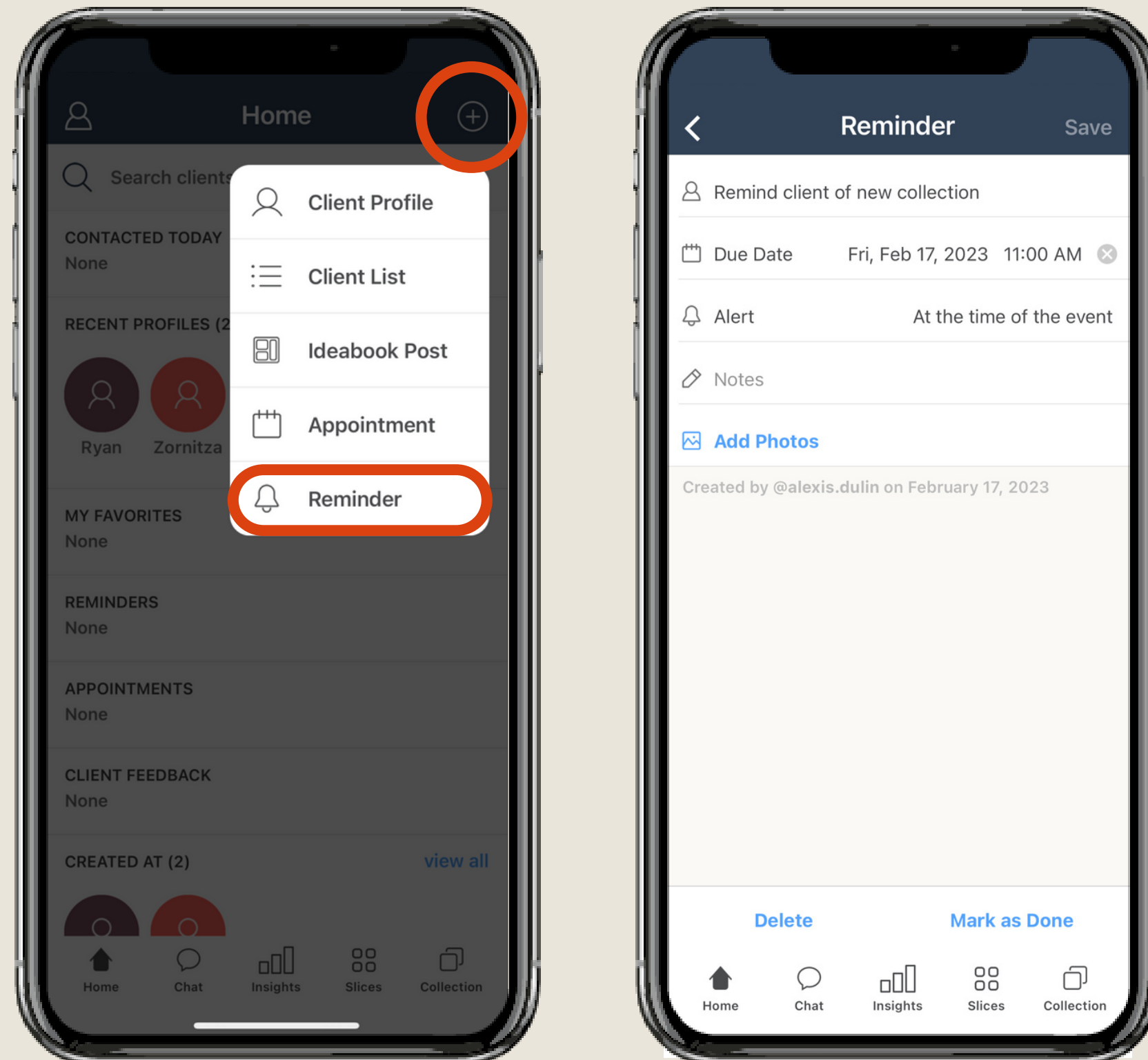


Share the appointment with your client by tapping the scheduled appointment.

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.

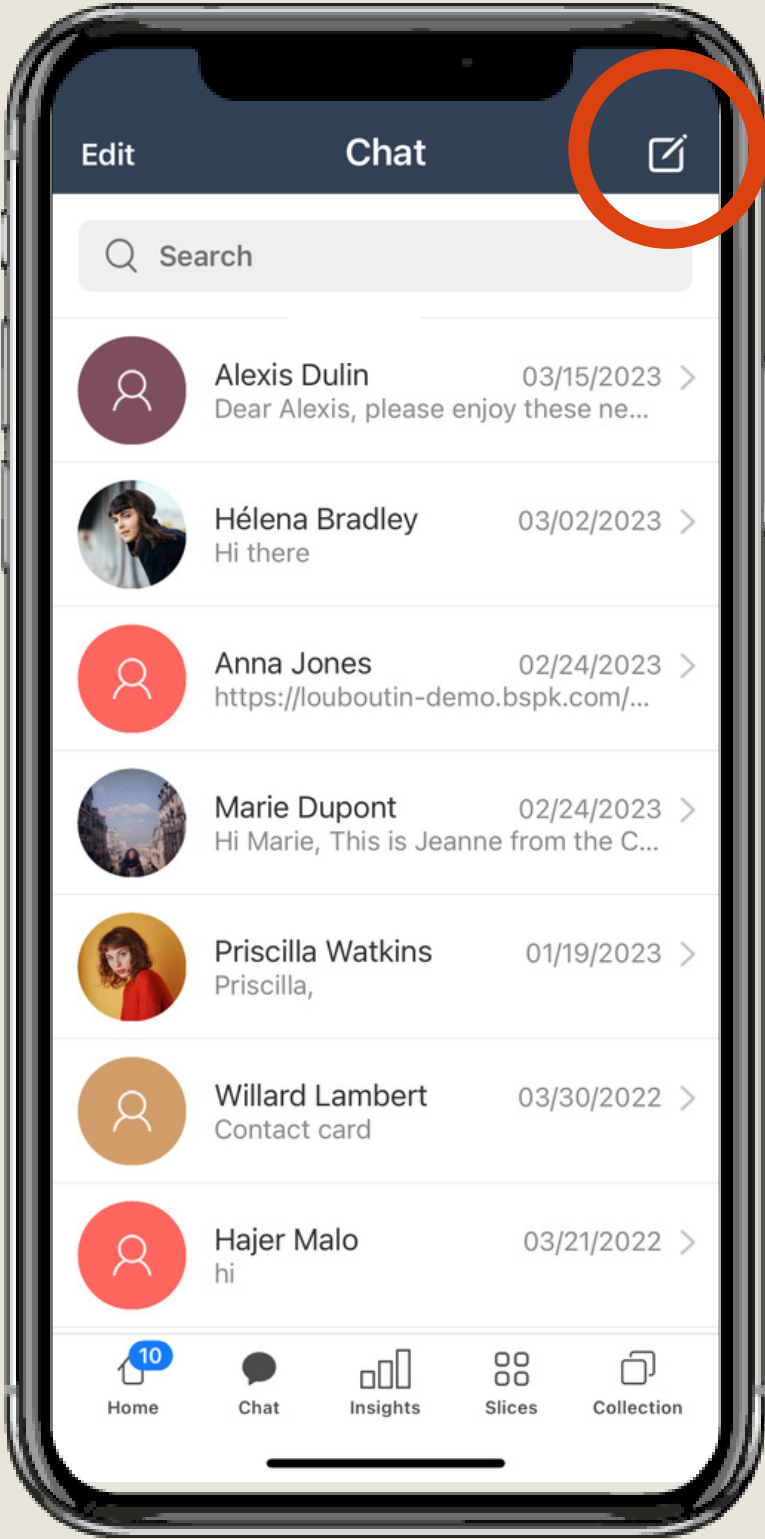
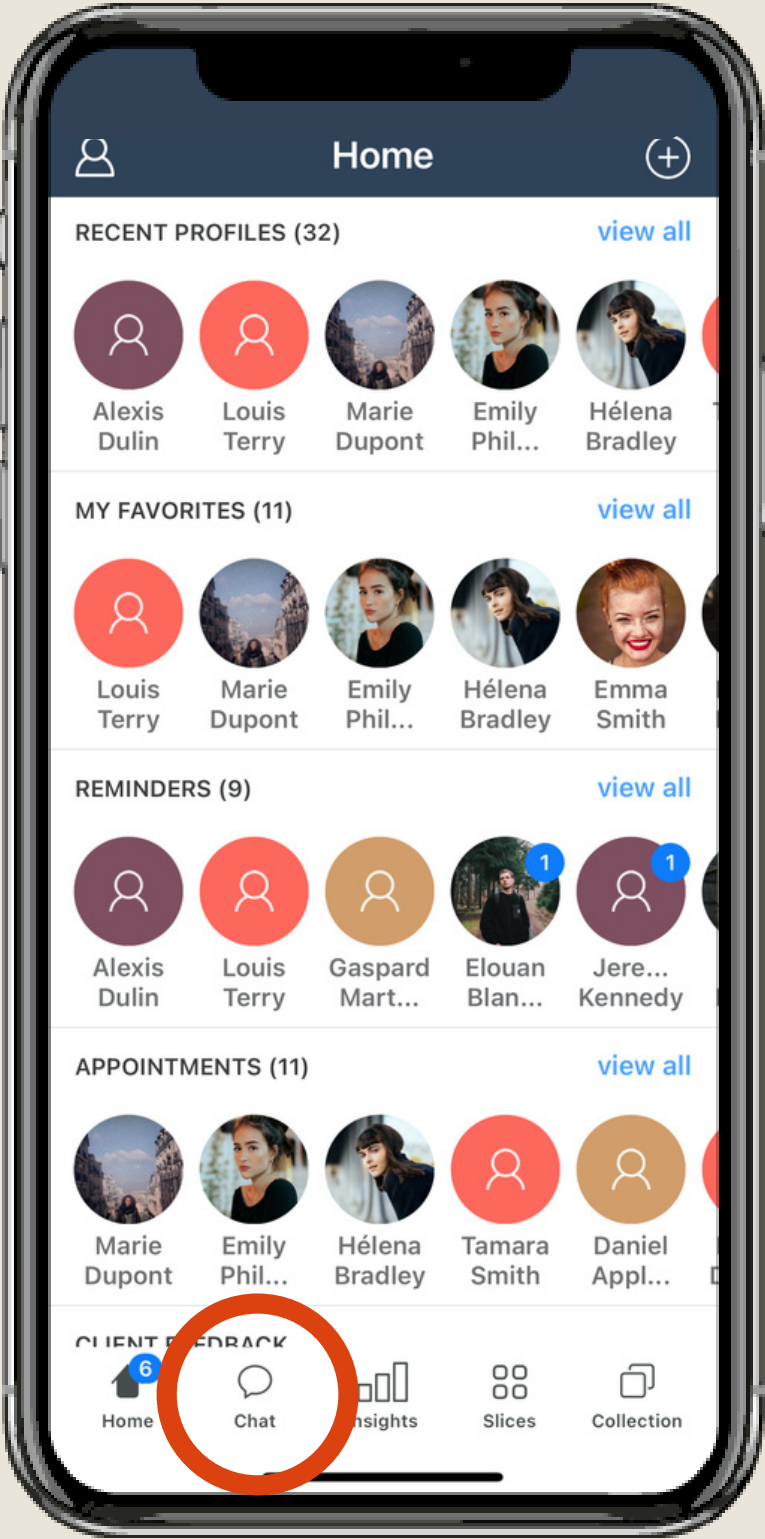


Reminder templates/prompts are preset in the app.

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

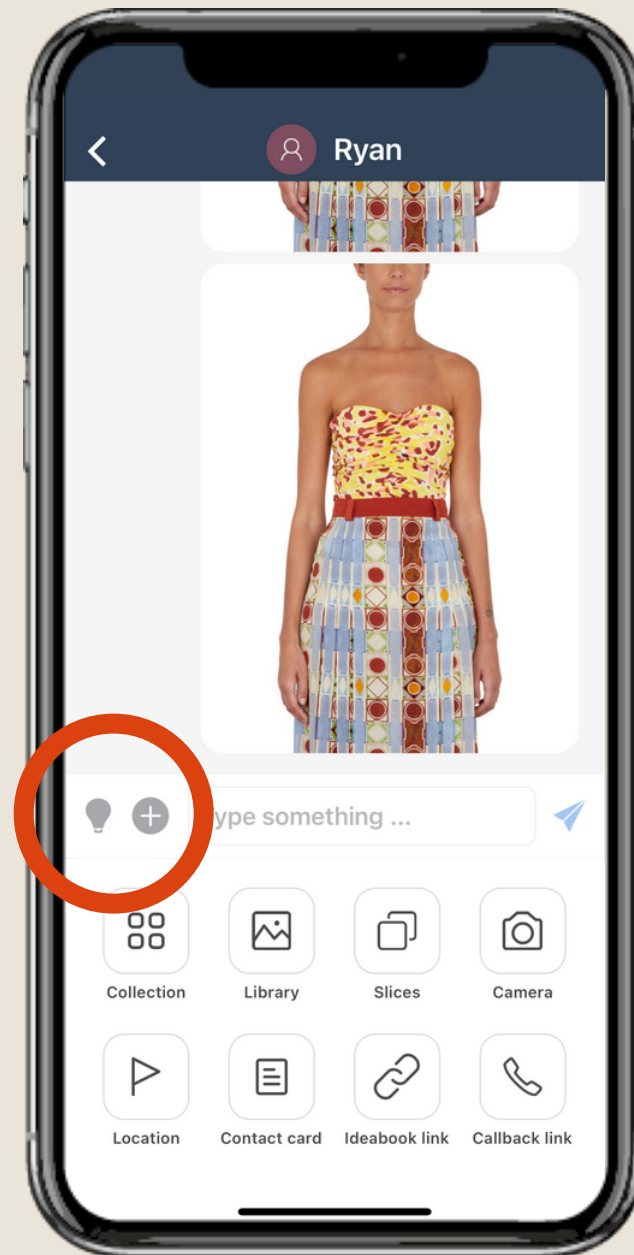
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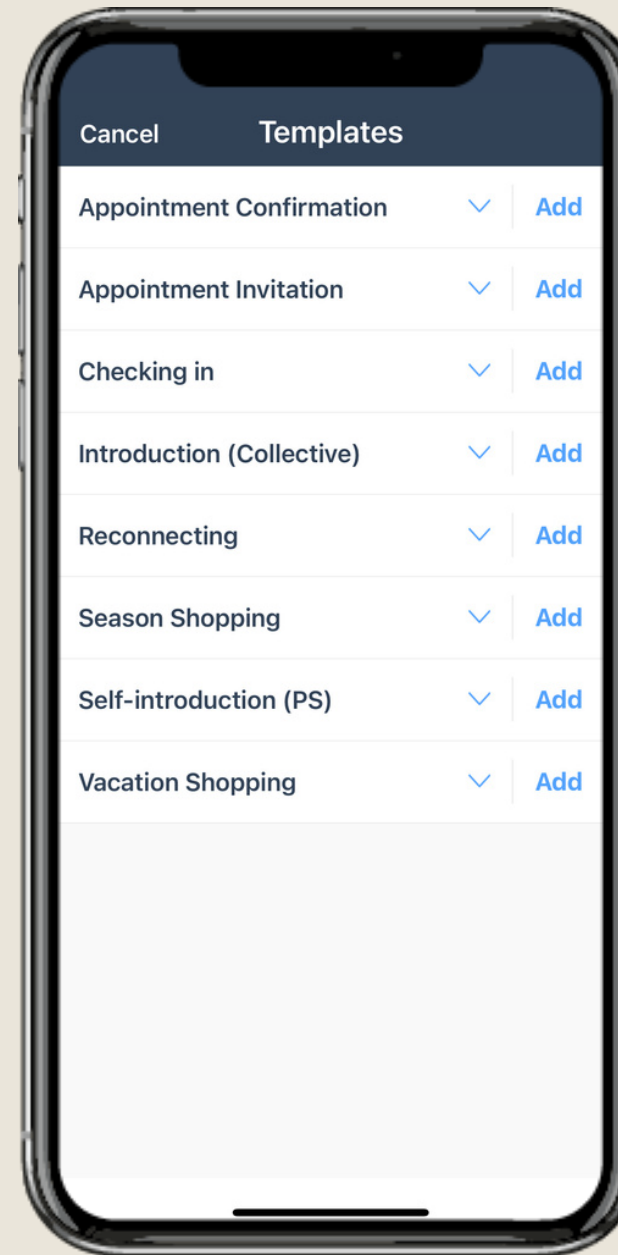
- Tap the chat icon on the menu at the bottom of the screen to access your client conversations.
- Start a new chat with icon in the upper right corner on the chat screen.
- You can also enter a chat through a client's profile

SEND A CHAT CONT.

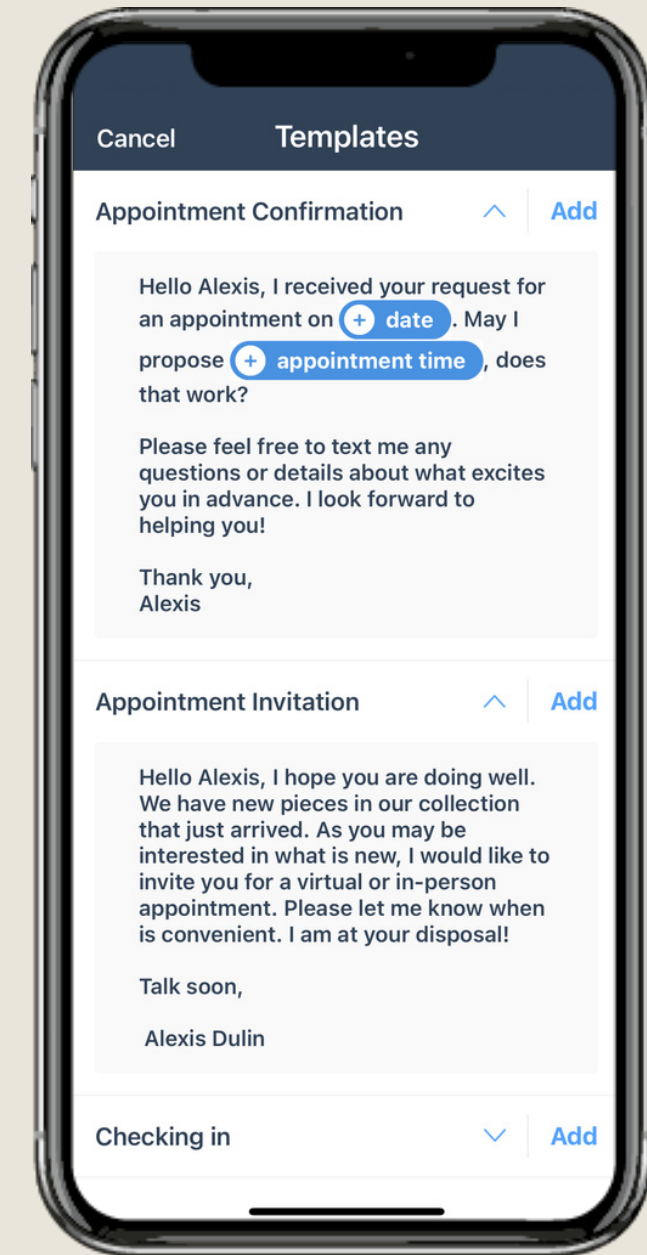
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On the chat screen, tap the light bulb icon to view pre-set templates to use in the chat.



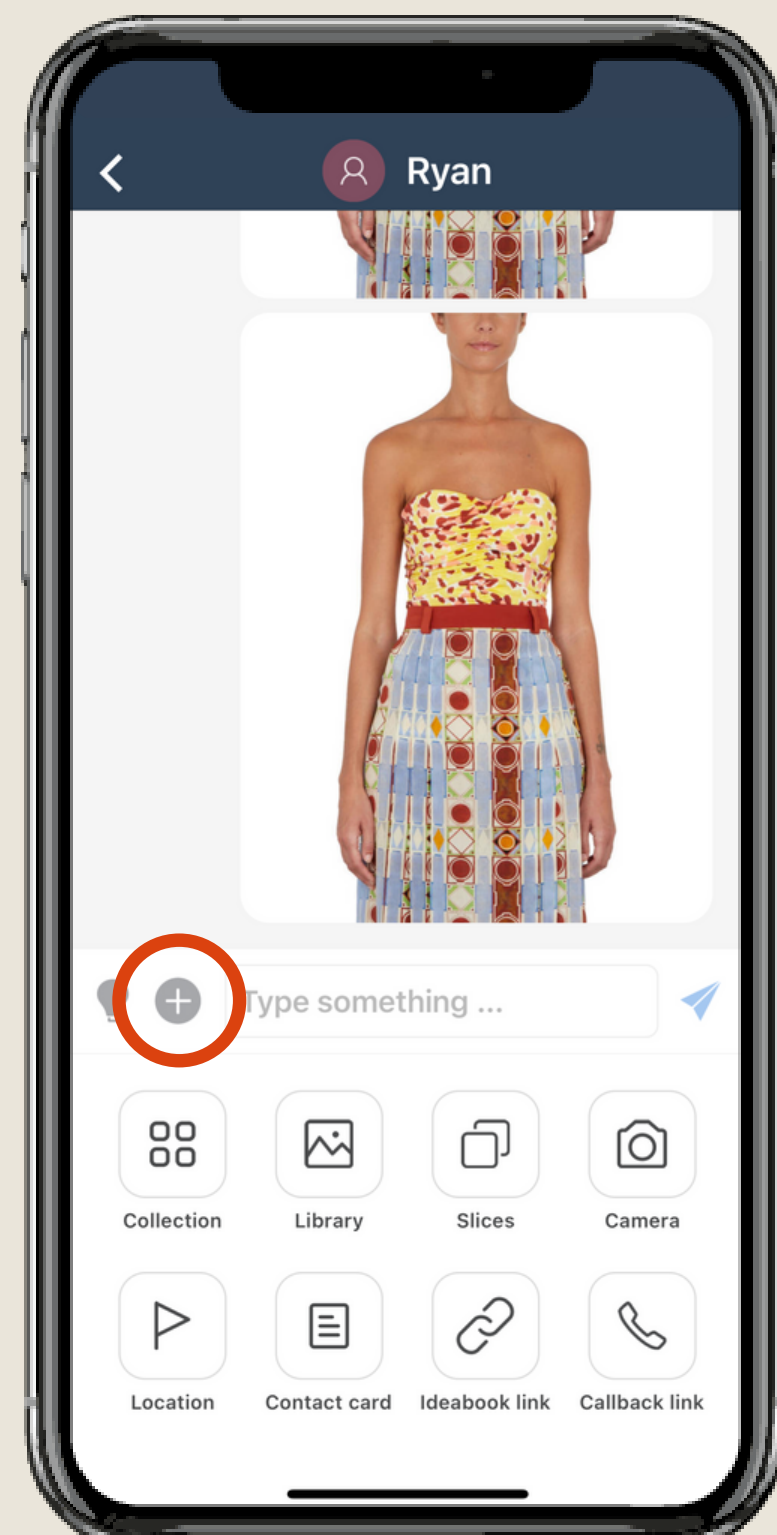
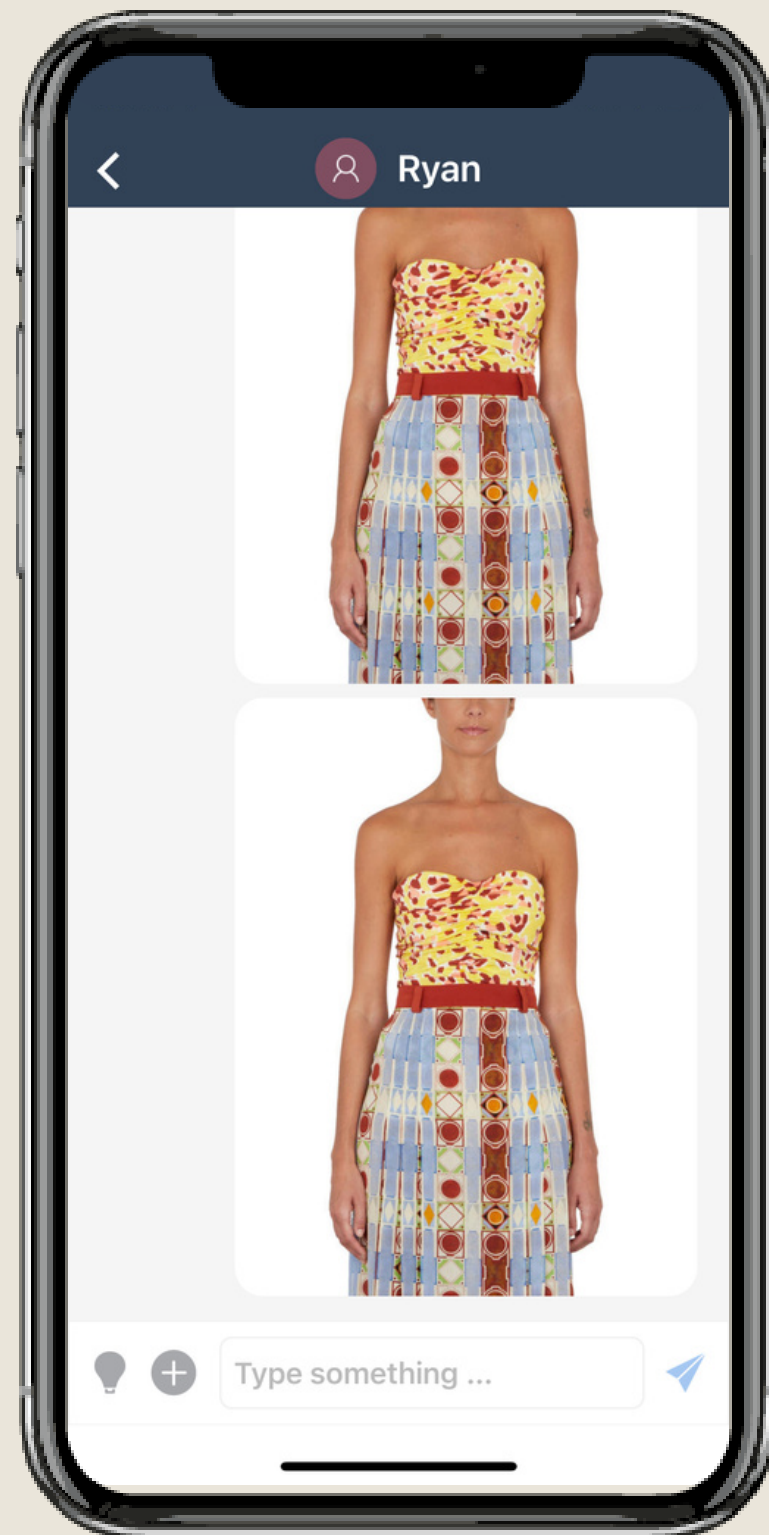
Choose from pre-set templates to message your clients.



Easily customize your templates.

SEND A CHAT CONT.

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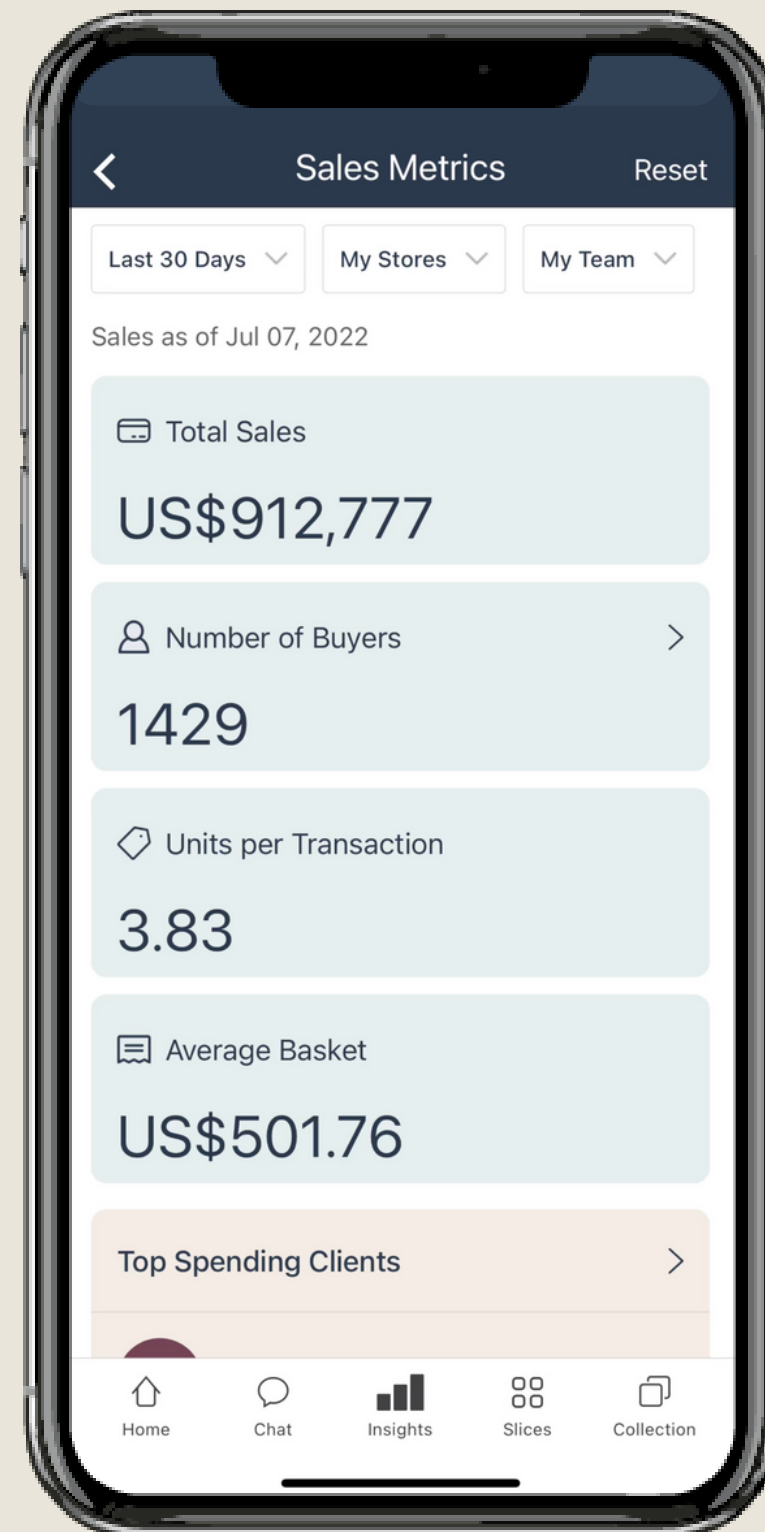
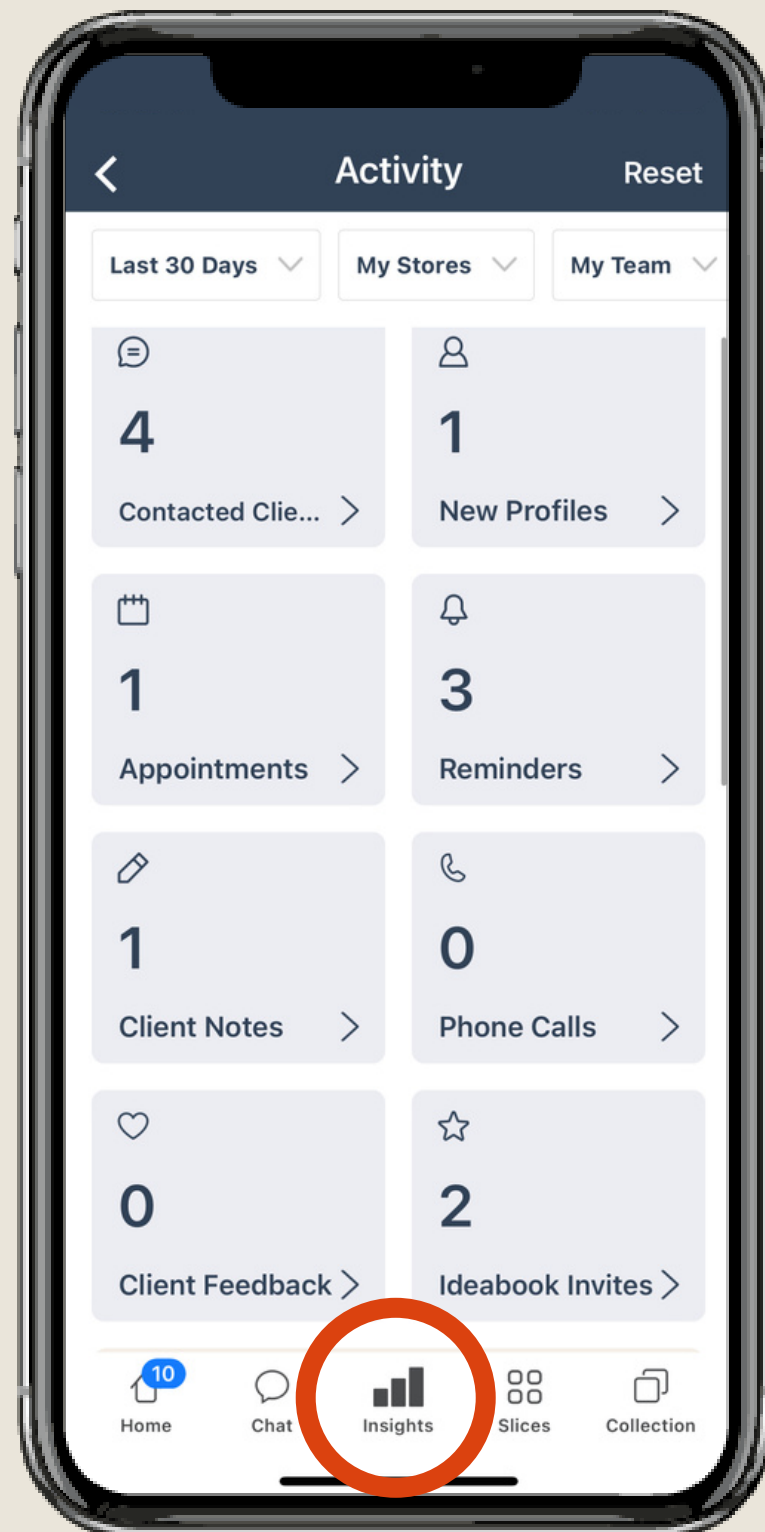


Tap the plus icon to view a list of different sending options.

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

INSIGHTS

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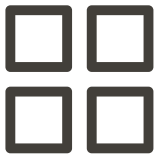
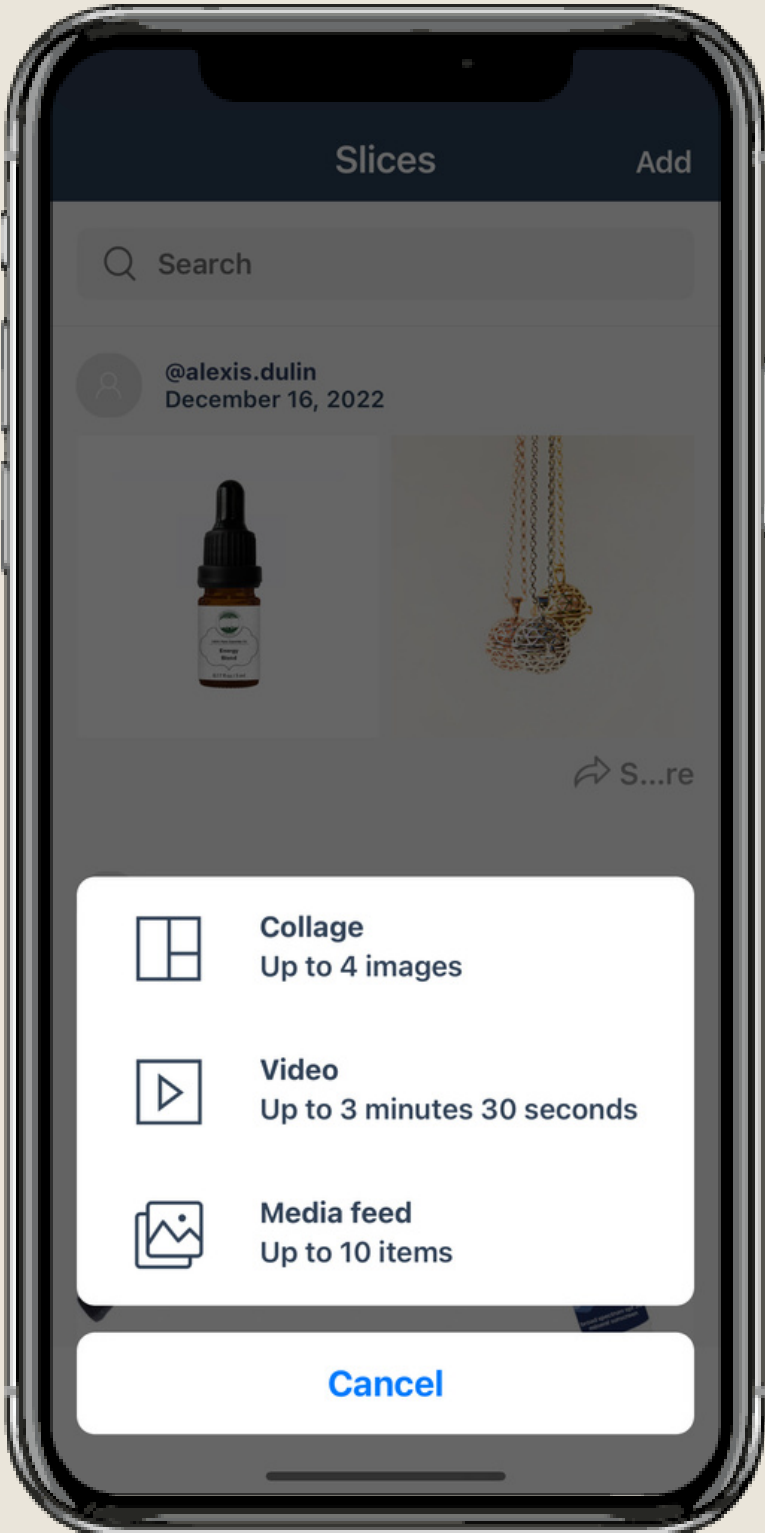
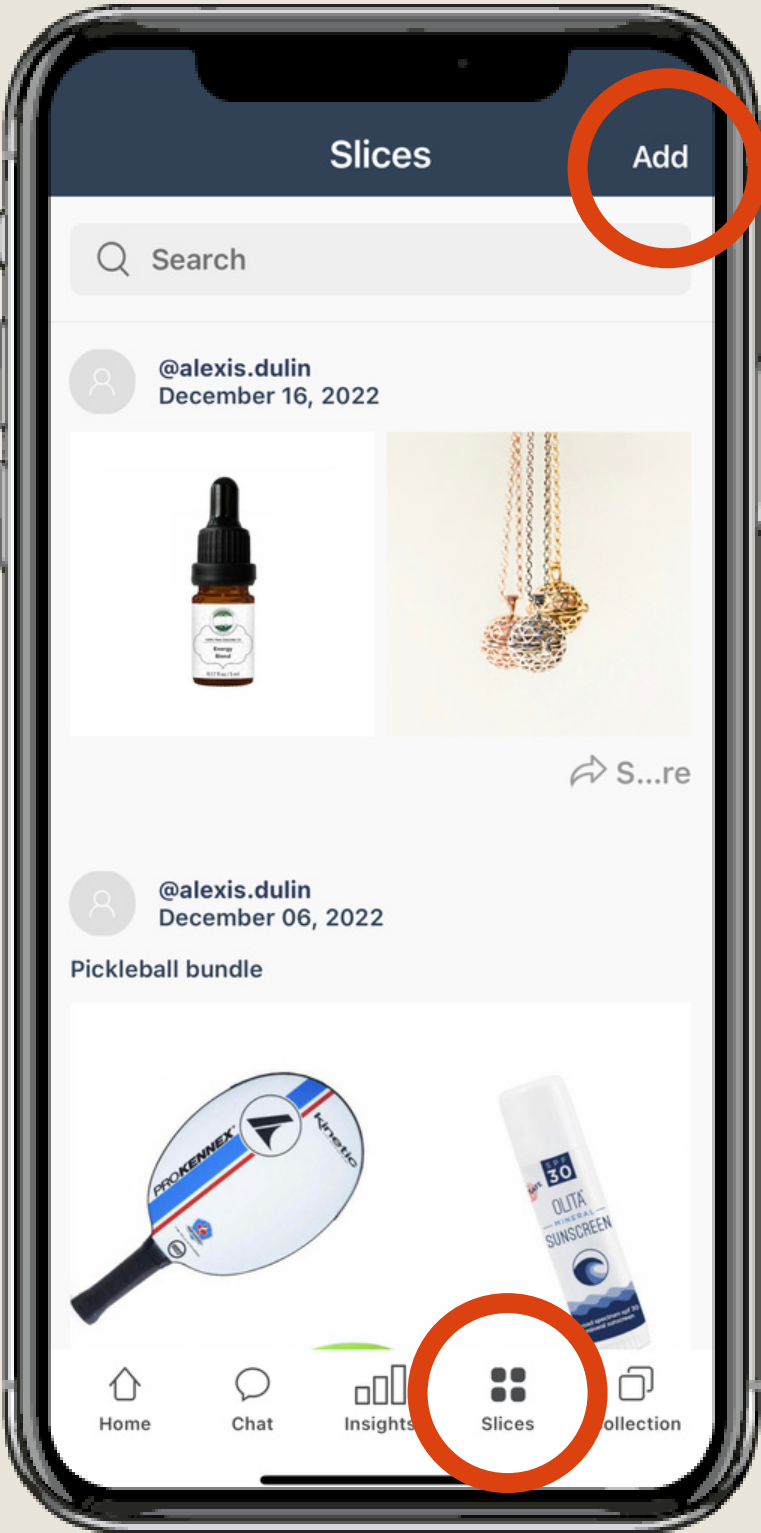
Tap the insights icon on the menu at the bottom of the screen to view your activities on the BSPK app.

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.

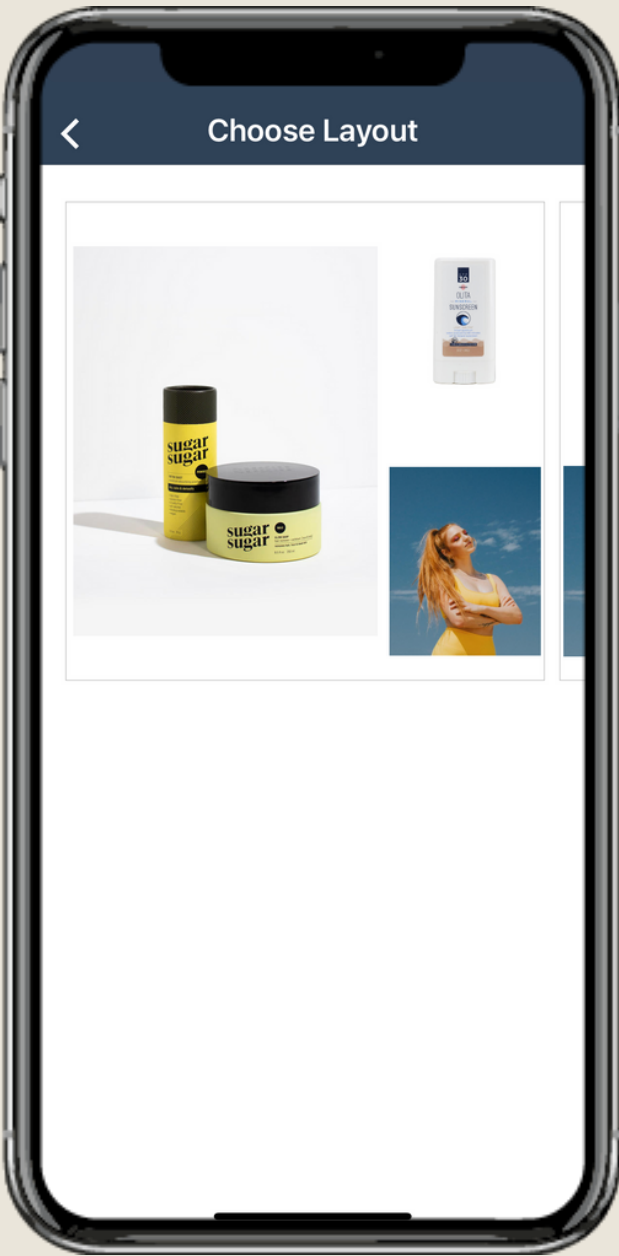
Slices are a way for you to create collages of photos or videos for you to share with your clients and team members.

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

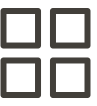
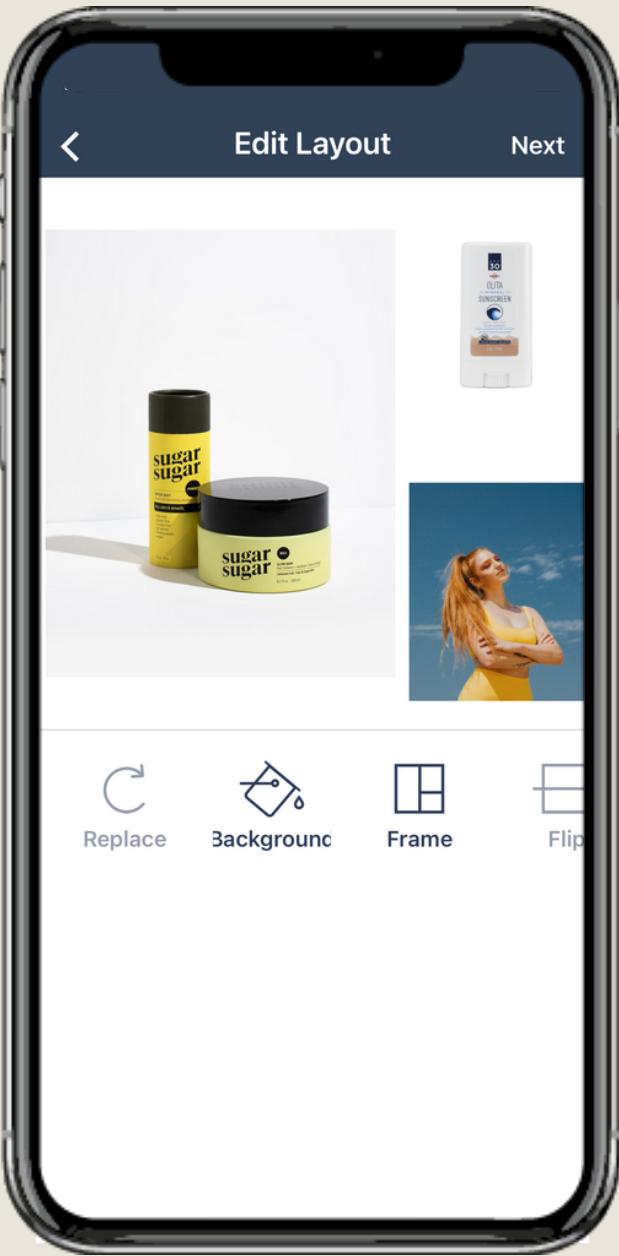
Select the type of slice you would like to create, then choose the media from your collection, phone or take a photo/video.

CREATE A SLICE CONT.

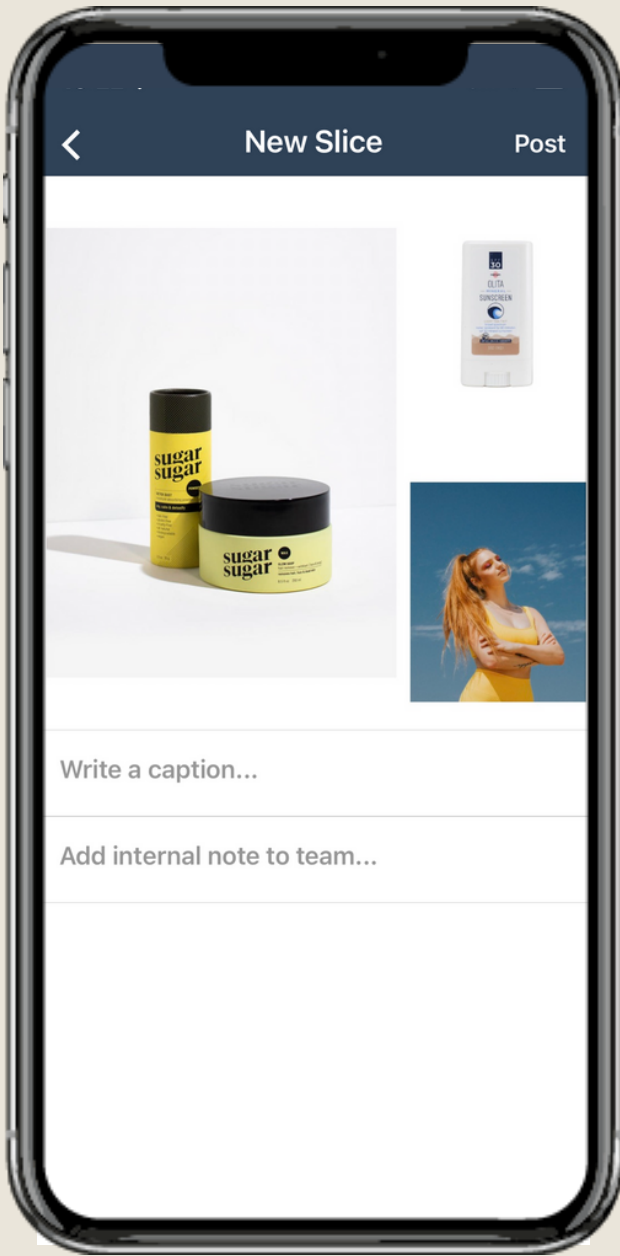
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Scroll between different layouts for a slice.



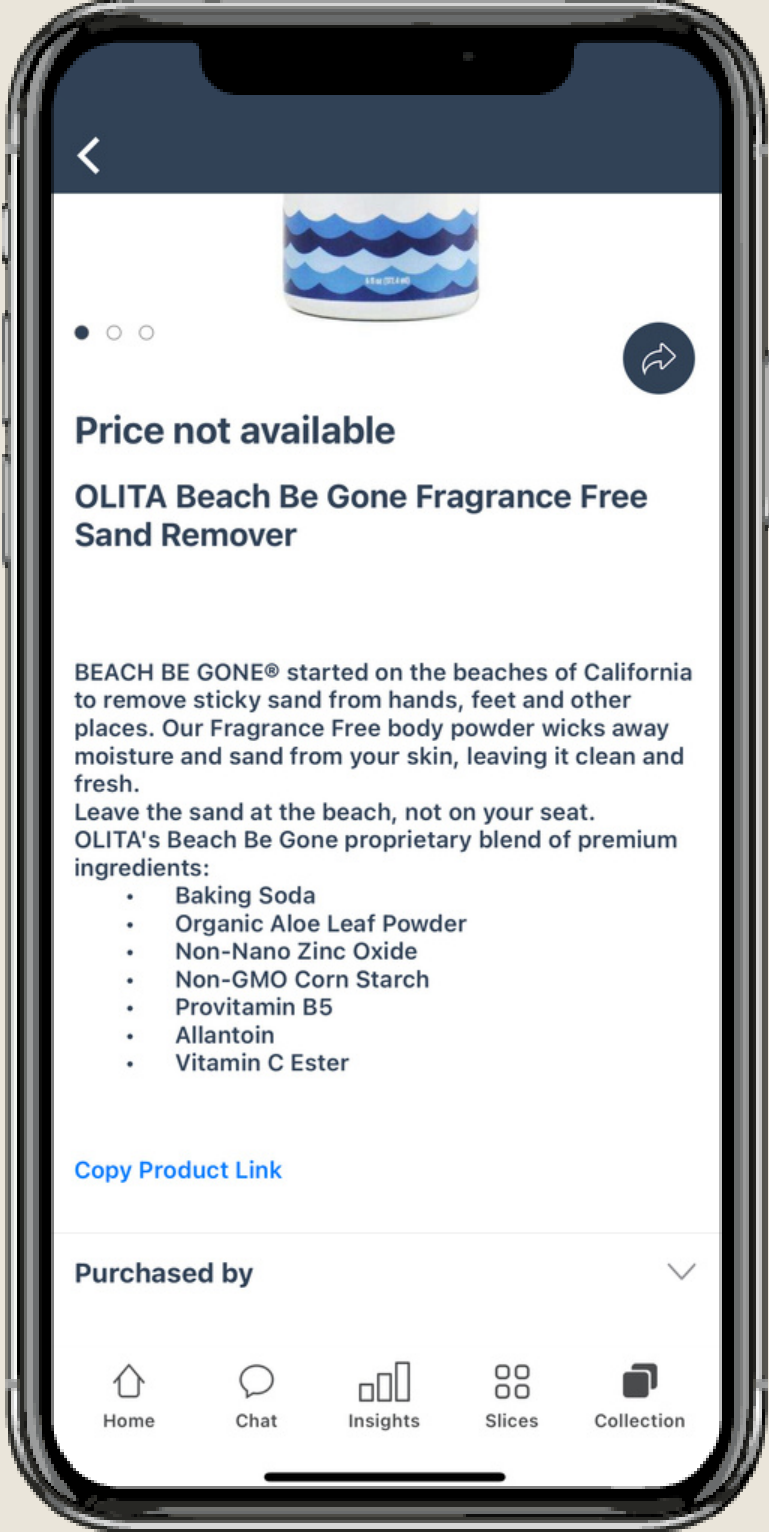
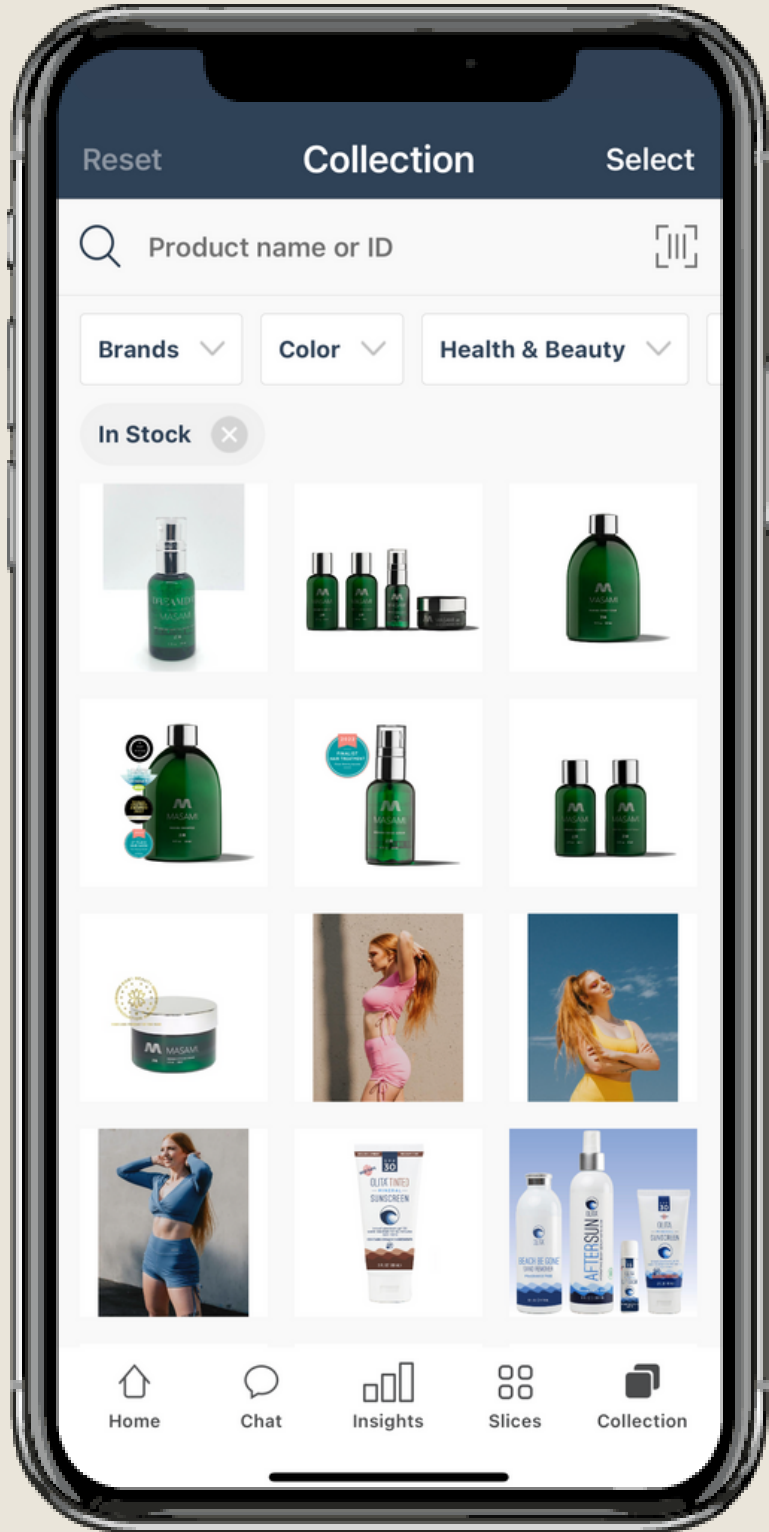
Edit the layout by changing things like, background color, frame, photo size, etc.



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

COLLECTION

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Tap the collection icon on the bottom menu.

Here you can view all your products.



Use the drop filter options to organize and search for products.

Tap on a product to view product details and to send a purchase link to your clients.

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