

# **BSPK APP** TRAINING

Everything you need to know about the BSPK app

#### BSPK

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#### BSPK



## 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.

#### BSPK



#### Alexis Dulin ONBOARDING QUESTIONS

alexis.dulin@bspk.com

## **QUICK START: CHECK LIST**

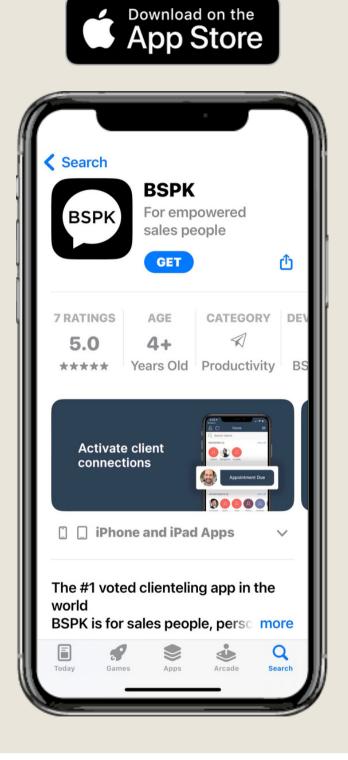
- 1. Download the BSPK iOS app from the App store
- 2. Create your account by signing with your mobile phone number
- 3. Sync your phone contacts to the BSPK mobile app or manually add client profiles
- 4. Send your first message and start your clienteling journey

#### BSPK

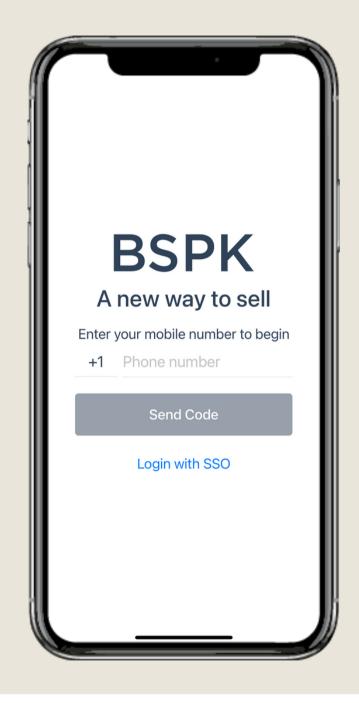




#### **DOWNLOAD & SET UP**

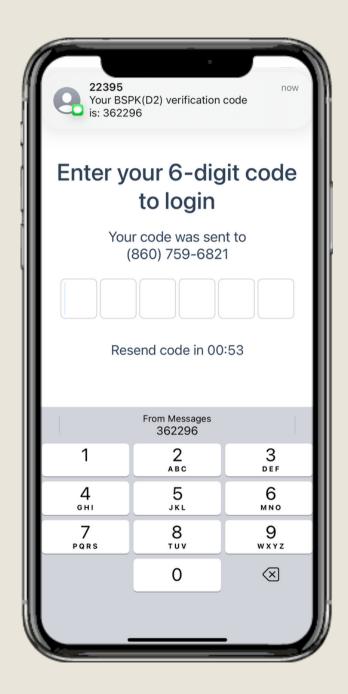


Download the iOS app on your iPhone from the App Store <u>here</u>



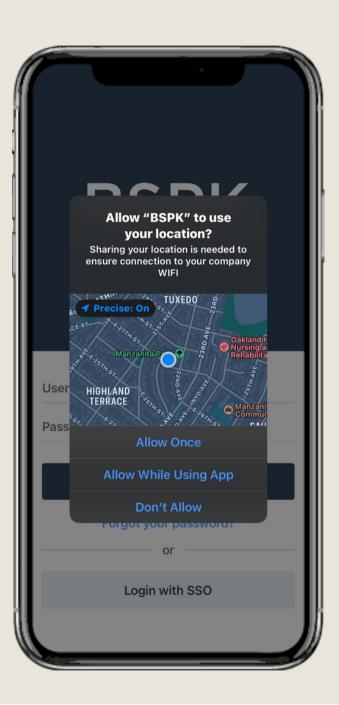
When you open the app, you will be prompted to enter your phone number

#### BSPK



Enter the 6-digit code sent to your phone.

#### DOWNLOAD & SET UP

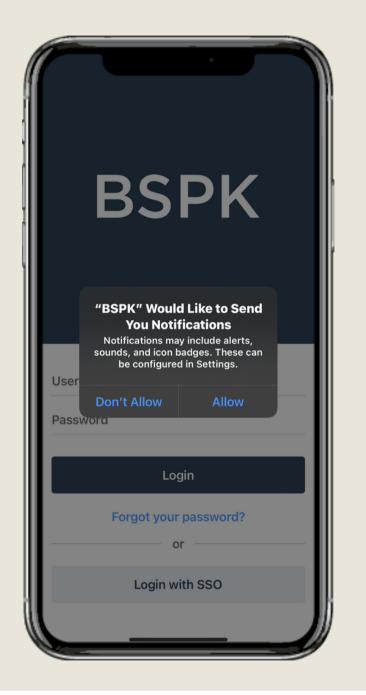


**Location:** Choose "Allow while using app"



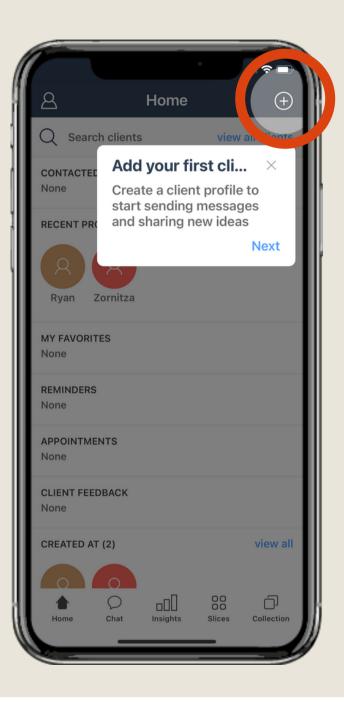
**Contacts:** Choose "OK" for BSPK to access your contacts

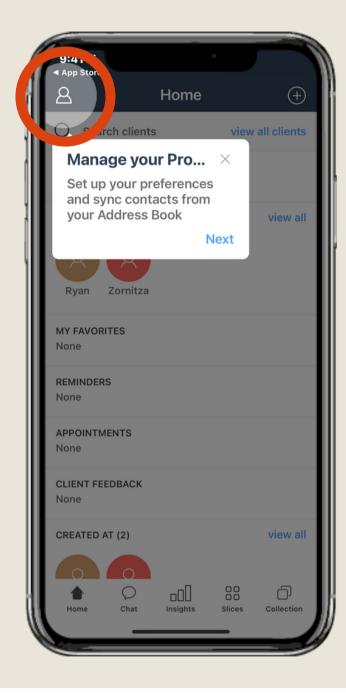
#### BSPK



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

#### DOWNLOAD & SET UP





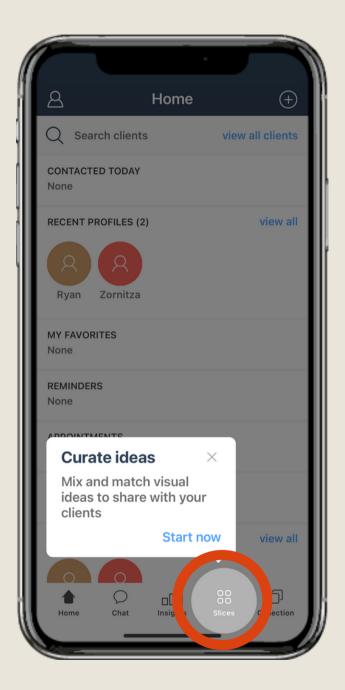


Create a client profile with contact information and other important details

 $\square$ 

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

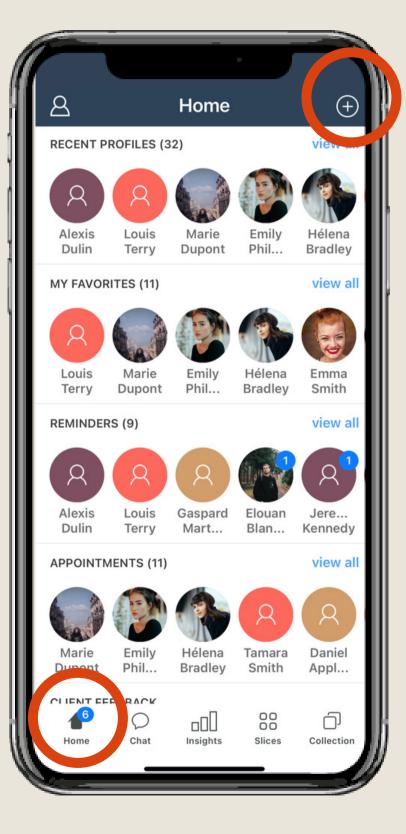
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Create a slice to curate your own ideas and share with your clients

#### HOME SCREEN



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.

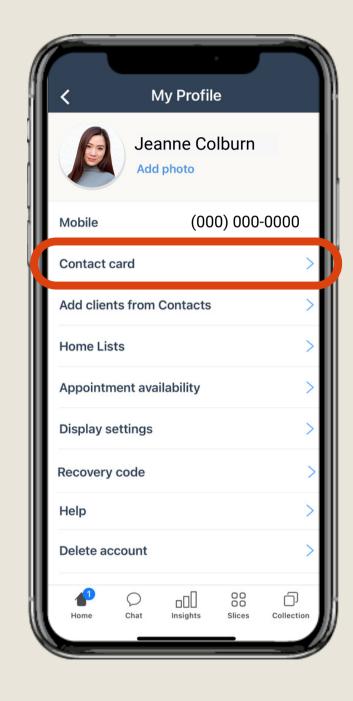
Use the plus bu Client Profile Client List Ideabook Post Appointment Reminder

#### BSPK

Use the plus button to access: Client Profile

#### **MY PROFILE**





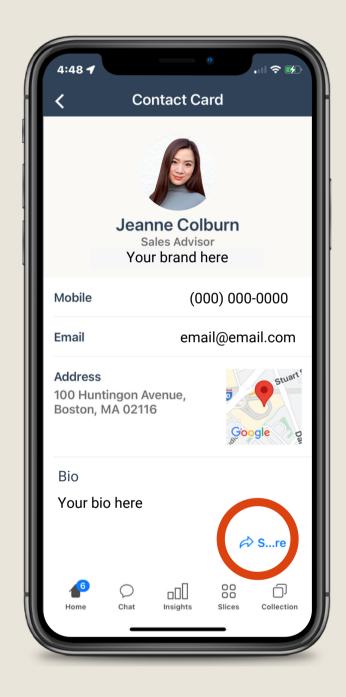


Tap the profile icon to edit your BSPK profile.

 $\square$ 

Use the contact card to share with clients

#### BSPK

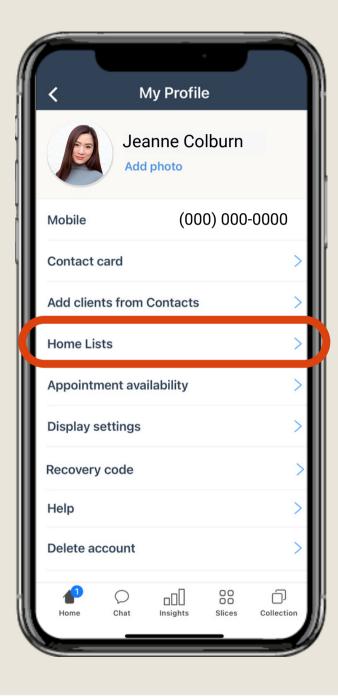


 $\square$ 

Easily share via SMS, WeChat, WhatsApp, and more

#### MY PROFILE- CONTACTS & LISTS

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Home Lists	;			>
Appointme	nt avai	lability		>
Display set	tings			>
Recovery c	ode			>
Help				>
Delete acco	ount			>
Home	() Chat	Insights	00 00 Slices	Collection





Sync and add clients from your phone contacts.

 $\triangle$ 

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

#### BSPK

<	н	ome List	s	Create
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Recent F	Profiles			=
My Favo	rites			=
Reminde	ers			=
Appoint	ments			=
Client Fe	edback			=
created	at			
Home	O Chat	D Insights	OO OO Slices	Collection

Create new client lists and organize your current ones.

### **MY PROFILE - APPOINTMENT AVAILABILITY**

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Help				>
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Availability Sav	e
j Select your availability for appointments. Clients will see this in their ideabook when requesting an ap.	
November 2022	1
Mo Tu We Th Fr Sa Su	
1 2 3 4 5 6	
7 8 9 10 11 12 13	
14 15 16 17 18 19 20 •	
21 22 23 24 25 26 27	
28 29 30	1
	1
December 2022	
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Home Chat Insights Slices Collection	

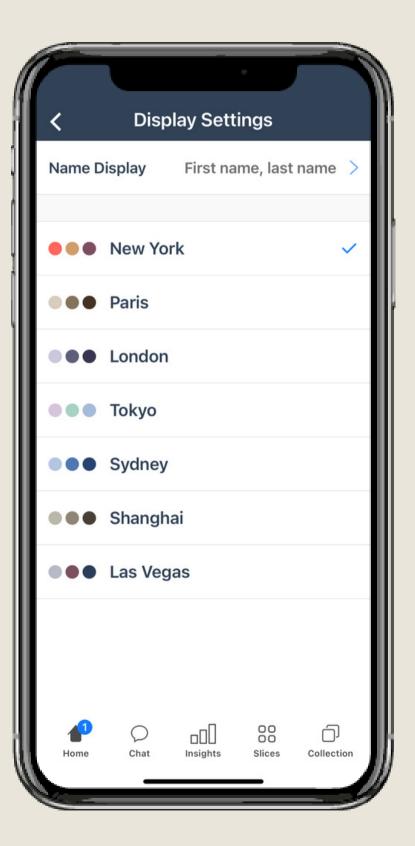


Tap Appointment availability and select your time availability to meet with your clients.

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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Home	O Chat	Insights	O O O O Slices	Collection



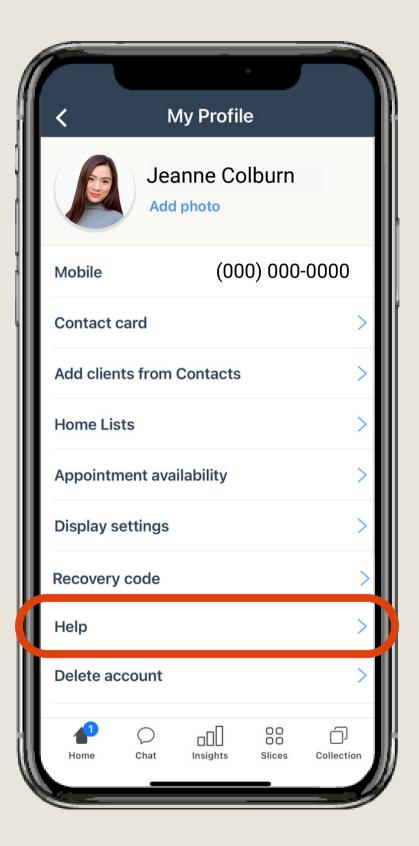
#### BSPK

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

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		anne Co photo	olburn	
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Add clien	ts from	Contacts		>
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Appointm	nent ava	ilability		>
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Delete ac	count			>
Home	O Chat	D Insights	00 00 Slices	Collection



#### BSPK

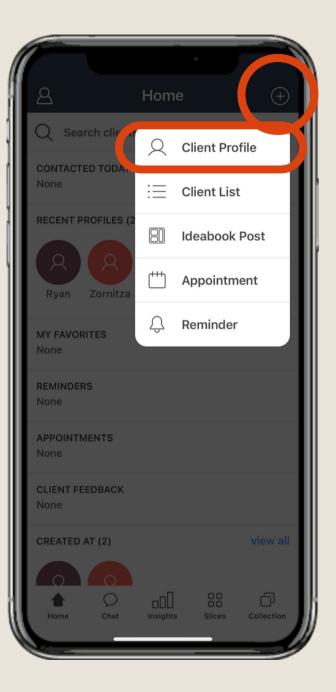


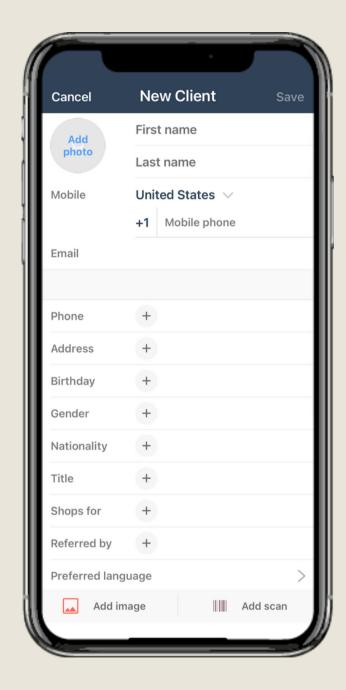
View your recovery code, save this in case you need to use it to log back into the app.



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

#### **CREATE A CLIENT PROFILE**







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.

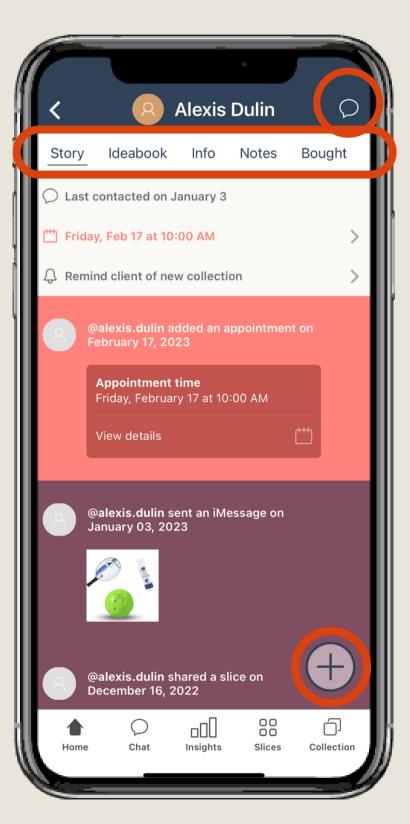
#### BSPK

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Mobile		(00	0) 000 <sup>.</sup>	-0000
Contact	card			>
Add clier	nts from	Contacts		>
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Displays	settings			>
Recovery	/ code			>
Help				>
Delete a	ccount			>
Home	O Chat	Insights	00 00 Slices	Collection

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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 you finger to slide through the menu options at the top.

client profile



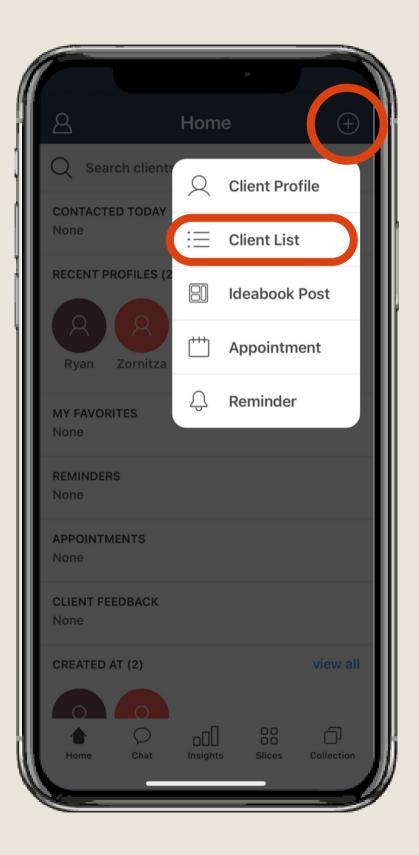
messages.

client to a list.

#### BSPK

- Appointments and reminders will show up at the top of a
- Use the info button to update the client's information.
- Use the chat icon in the upper right corner to take you to
- Use plus icon to quickly share an ideabook post, write a note, schedule an appointment, create a reminder or add

#### **CREATE A CLIENT LIST**

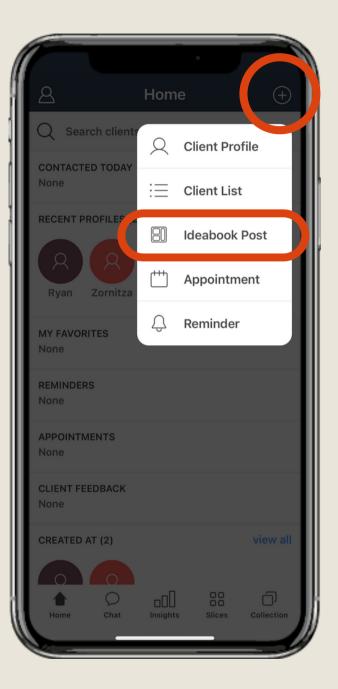


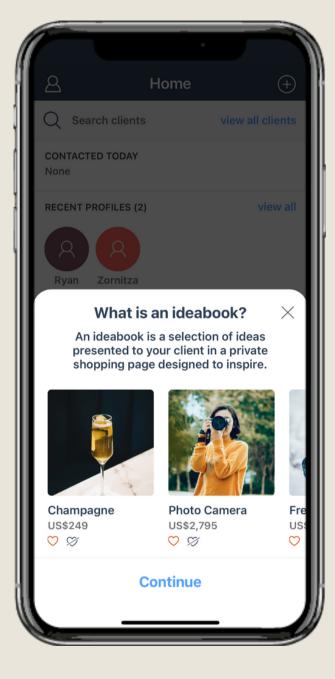
Cancel	Create List	Save
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SHOW ME C	LIENTS BASED ON:	
ENGAG	EMENT	
Appointme	nt Date	>
Message Da	ate	>
Last Contac	cted Date	>
Q PROFIL	E	
Gender		>
Profile Crea	ated Date	>
Profile Upd	ated Date	>
0 clients		Clear all

#### BSPK

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

#### **CREATE AN IDEABOOK POST**





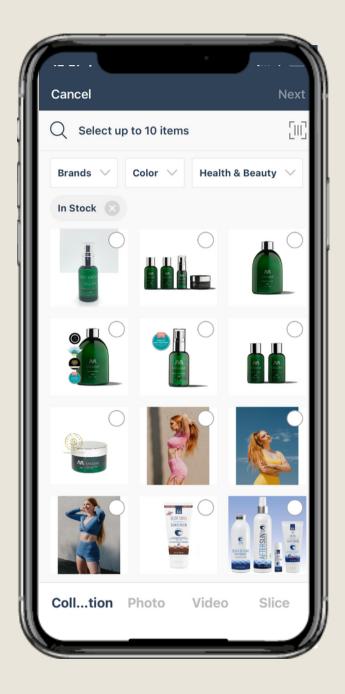


Select "Ideabook Post" to curate a selection of products to send to your client.



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

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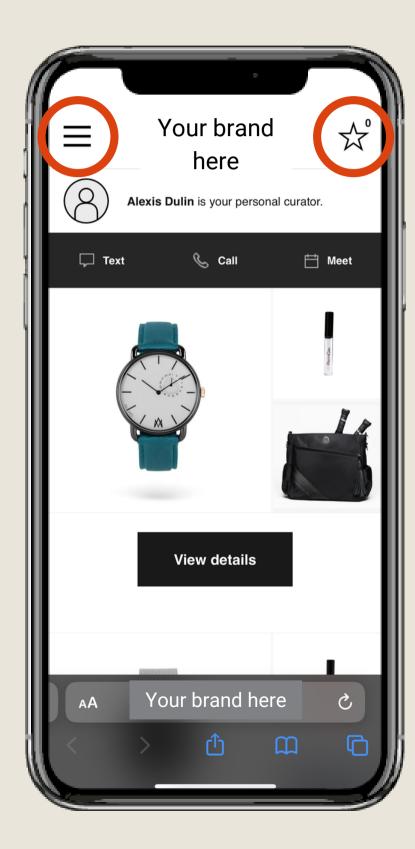




Choose selections from your collection in the app for you to sell to your clients

#### **IDEABOOK FOR THE CUSTOMER**

<			AD exis >			
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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.

#### BSPK

#### **CREATE AN APPOINTMENT**

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8	Hom	e	(  e )
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CONTACTED TODAY None	:=	Client List	
RECENT PROFILES (2	81	Ideabook Po	ost
Ryan Zornitza	<b>—</b>	Appointmer	nt
MY FAVORITES None	Û	Reminder	
REMINDERS None			
APPOINTMENTS None			
CLIENT FEEDBACK None			
CREATED AT (2)			view all
Home Chat	Insights	OO OO Slices	Collection
-			

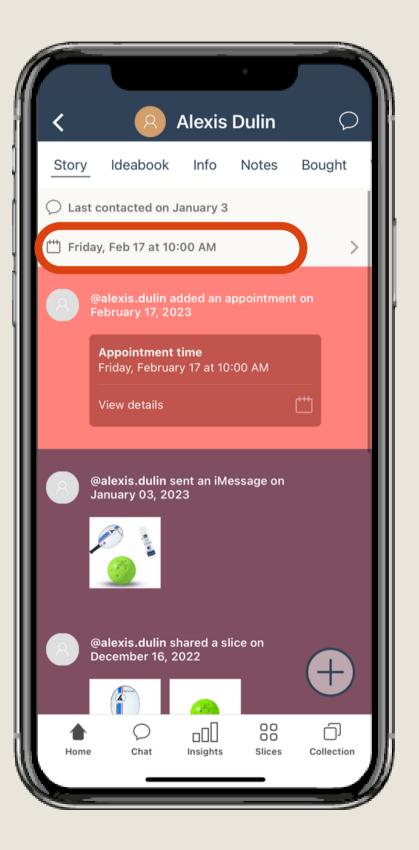
P				
<		Appointmer	nt Save	
8	Client comi	ng into store		I
<u> </u>	Date	Fri, Feb 17	7, 2023 10:00 AM	I
Û	Alert	At the	e time of the event	I
Ø	Type an app	pointment note he	ere	
	Add Photos	S		
	Delete	Mark as Done	e Share	
		_		

#### 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.**



<		Appointment Save
8	Client comir	ng into store
<u> </u>	Date	Fri, Feb 17, 2023 10:00 AM
Û	Alert	At the time of the event
Ø	Type an app	pointment note here
	Add Photos	S
	Delete	Mark as Done Share

#### 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**

		•		
8	Hom	e	(  eq )	
Q Search clients	2	Client Prof	ile	
CONTACTED TODAY None	:=	Client List		
RECENT PROFILES (2	81	Ideabook F	Post	
Ryan Zornitza	<u> </u>	Appointme	ent	
MY FAVORITES None	Ģ	Reminder		
REMINDERS None				
APPOINTMENTS None				
CLIENT FEEDBACK None				
CREATED AT (2)			view all	
Home Chat		OO OO Slices	Collection	
-				ļ

P		•	
<		Reminder	Save
8	Remind client	of new collection	
<u> </u>	Due Date	Fri, Feb 17, 2023	11:00 AM 🙁
Ą	Alert	At the tim	e of the event
Ø	Notes		
	Add Photos		
	Delete	Mark	as Done
,	home Chat	Insights Slice	

#### BSPK

Create reminders for yourself right inside the BSPK app.

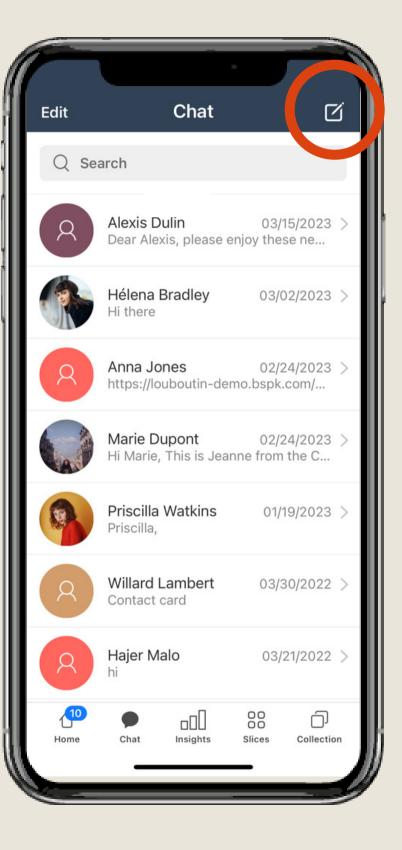
Select "Reminder" and choose the associated client or create directly from the client's profile. Fill out the information on the reminder screen.

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





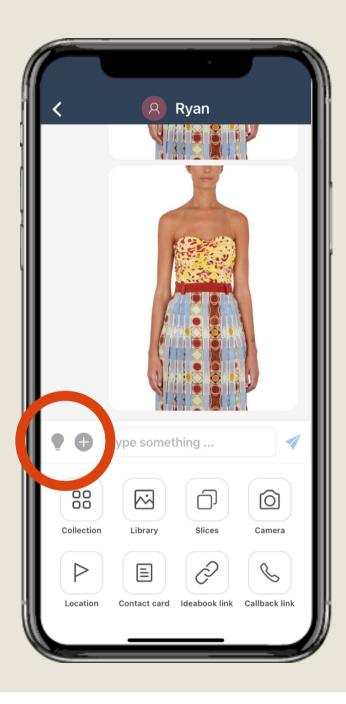
#### BSPK

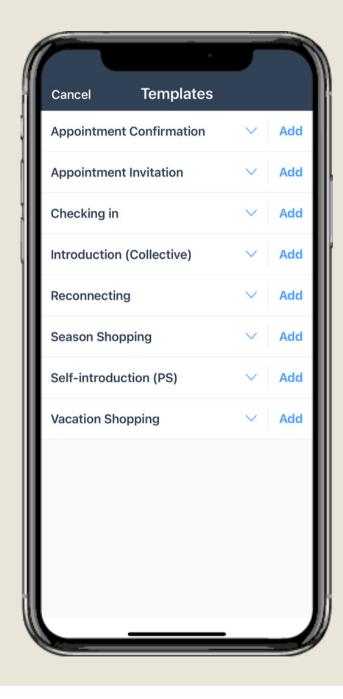
Tap the chat icon on the menu at the bottom of the screen to access your client conversations.

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.







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.

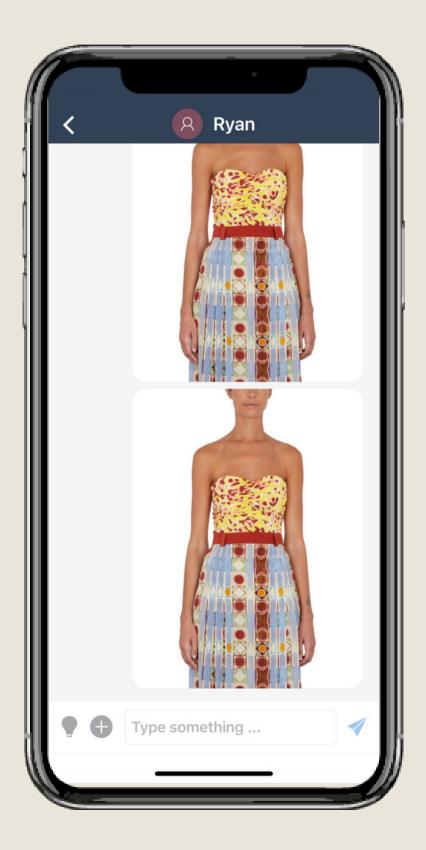
#### BSPK

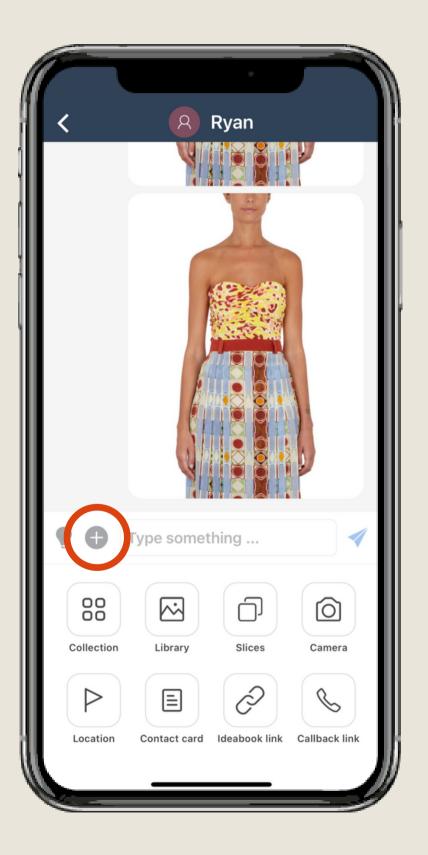
Cancel	Templa	ates		
Appointme	ent Confirmat	ion	~	Add
an appo propose that wo Please f questio	eel free to text ns or details al dvance. I look you!	date . ment time t me any pout what	May I , doe	!S
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Checking i	n		$\checkmark$	Add

Easily customize your templates.

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#### SEND A CHAT CONT.





#### BSPK

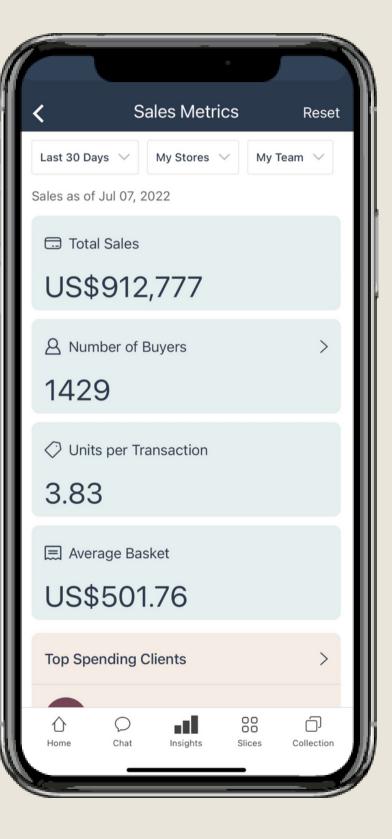
Tap the plus icon to view a list of different sending options.

- Collection
- Library
- Slices

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

#### INSIGHTS

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4		1		
Contacted Clie	>	New Pro	ofiles	>
Ë		Д.		
1		3		
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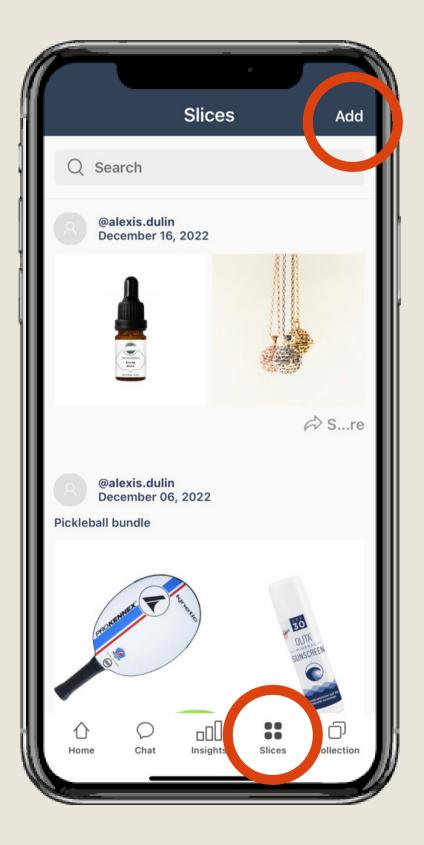
#### BSPK

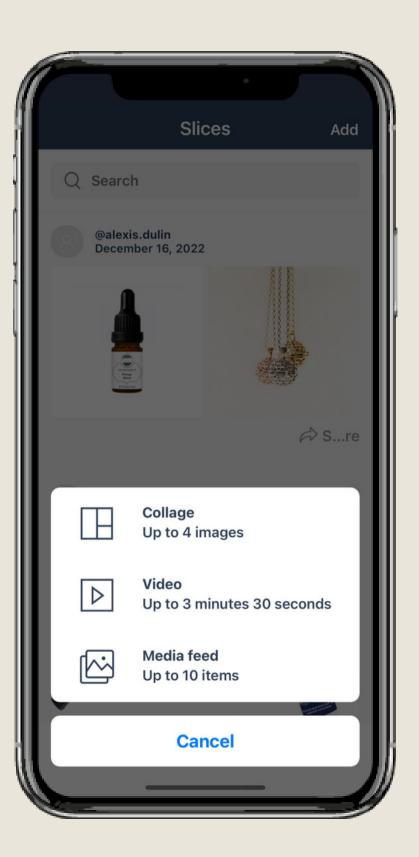
Tap the insights icon on the menu at the bottom of the screen to view your activities on the BSPK app.

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

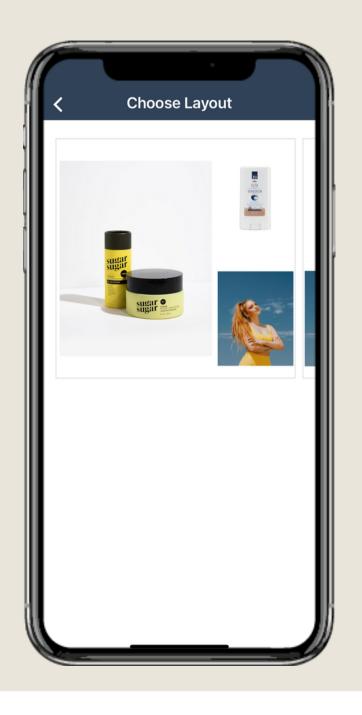
Tap the Slices to view the Slices you and your team create.

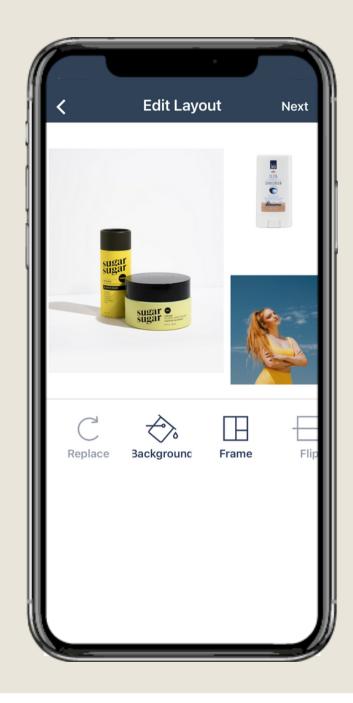
Slices are a way for you to create collages of photos or videos for you to share with your clients and team members.

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.





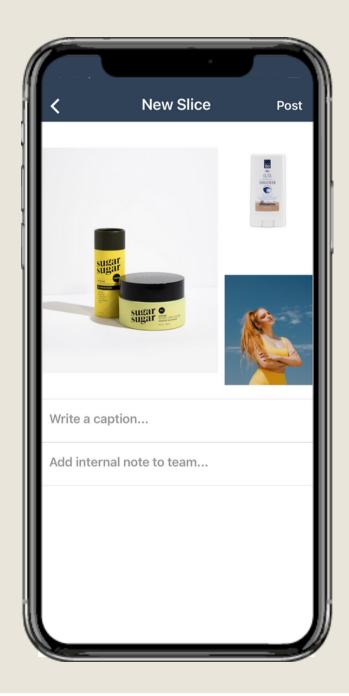


Scroll between different layouts for a slice.

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

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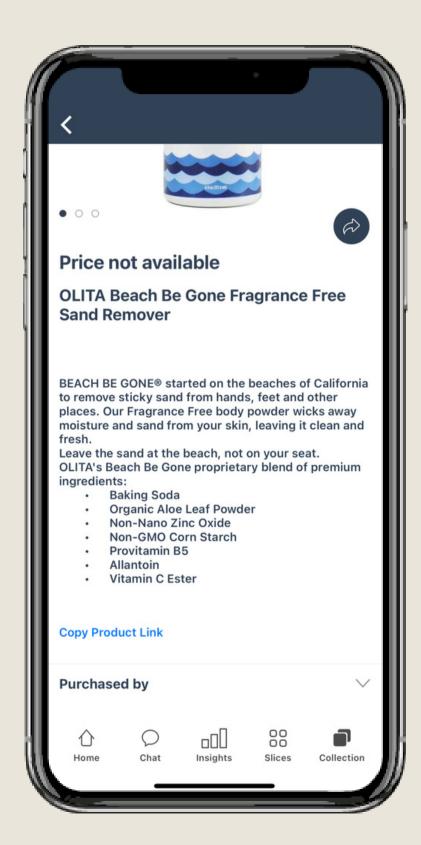




Add a caption or notes to a slice and tap post. You can share the slices with other advisors or clients.

#### **COLLECTION**

Reset	Collection	Select
Q Product	name or ID	[H]
Brands $\lor$	Color 🗸 Heal	th & Beauty 🖂
In Stock 🙁		
Home C		OO Collection



#### BSPK

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

\*Collection tab only available to those who sync their products into the BSPK App