ClientPulse

Complete Help Manual

Every feature, explained — booking, Glide-In™, CRM, promotions, payments, MyFamilyPulse, and more.

Need a person? Call 386.286.8013 or email jan@clientpulse.ltd.

Contents

GETTING STARTED

First-time setup

When you first sign in, the Getting Started tour launches automatically and stays visible until all three phases are complete.

The three phases

- Basic Required — business info, staff, services, hours. You cannot take bookings until this is done.
- Client Experience — booking link, Glide-In™ template, review requests, satisfaction follow-ups.
- Revenue Growth — promotions, packages, gift cards, drip sequences, CRM lists.

You can pause and resume the tour at any time. When all phases are done, the interactive Help button in the bottom-right is your ongoing guide.

The Salon Hub (your dashboard)

The Salon Hub at /salon is organized into 5 Workspaces so you spend less time hunting for features:

- Today — appointments, walk-ins, no-show flags, tips of the day.
- Clients — the CRM, contacts, deals, tasks, timelines.
- Marketing — promotions, packages, gift cards, drip sequences, reviews.
- Money — POS, payments, payroll, commissions, subscriptions.
- Setup — services, staff, hours, integrations, branding.

Press ⌘K (or Ctrl-K) anywhere to open the Universal Command Palette and jump to any screen or action.

BOOKING

Voice-first online booking

Your public booking page lives at clientpulse.ltd/book/{your-slug}. When a client opens it, our AI receptionist Ella greets them and books the appointment by voice.

How the flow works

- Ella asks for name, mobile, and service in one prompt.
- The client speaks their answer, then taps the pulsing Done button.
- Ella confirms with full weekday and month names (e.g. 'Wednesday, March 14').
- Clients can tap any field to edit — they go straight back to review, not to the beginning.
- First-Available AI matches the client with the best stylist based on skills and history.

A visitor-facing demo lives at /try-booking so prospects can experience it without booking a real slot.

Sharing your booking link

The /share-booking-link walkthrough gives you copy-paste text messages, email templates, Instagram bio snippets, and a downloadable QR code — all pre-filled with your booking URL.

Print the QR code and tape it to the mirror at each station. Clients scan and rebook before they leave.

Glide-In™ check-in

Two hours before every appointment, the client receives a text with a personal Glide-In™ link. Tapping it checks them in, notifies their stylist, and skips the front-desk line.

The link is token-based (one-time, expires after the visit) and works on any phone with no app install.

You'll see the check-in appear live on the Today workspace of the Salon Hub.

CRM

CRM overview

The CRM at /crm is modeled after HubSpot but tuned for salons. Every booking, sale, email, and SMS is automatically stitched into a unified client timeline.

- Dashboard — pipeline value, tasks due, hot leads.

- Contacts — searchable, filterable, with full timeline per person.
- Deals — Kanban pipeline (e.g. new lead → consult → membership signed).
- Tasks — an inbox of follow-ups assigned to you or staff.
- Lists — static and smart segments for targeting.
- Sequences — automated drip nurture.
- Meetings — bookable meeting types with public links.
- Import — CSV lead import with column mapping and dedupe.

Importing leads (CSV)

Go to /crm/import and drop in any CSV. We auto-detect headers and suggest column mappings (name, email, phone, notes, lifecycle stage).

Deduplication is automatic by email and phone — you can safely re-import the same file after adding new rows.

Optionally assign every imported contact to a new or existing list in one click.

Drip sequences

Sequences at /crm/sequences let you build multi-step campaigns (email, SMS, or task) and enroll any list or individual contact.

Typical uses

- 5-touch new-client welcome (day 0 email, day 3 SMS, day 7 task to call).
- Win-back for clients who haven't visited in 60 days.
- Membership upsell after 3rd visit.
- Birthday & anniversary sequences (also handled by MyFamilyPulse).

A cron job runs every 5 minutes to process pending steps.

Meeting scheduler

Define meeting types at /crm/meetings (e.g. '15-min consult', '30-min color consult').

Each type gets a public URL — /book/{your-slug}/{type-slug} — you can share with prospects. Confirmation emails and Whereby video links are handled automatically.

MARKETING

Promotions & packages

The Promotions engine at /beauty/promotions ships with a curated library of proven salon offers by occasion (birthday, anniversary, back-to-school, holiday) and by service (after color, after cut, after facial).

Pick a template, adjust price and dates, and target a list — the CRM handles delivery and tracks redemptions.

Gift cards & surprise cards

Digital gift cards can be sold from your booking page or Salon Hub. Surprise cards let a stylist send a small credit ('$10 to try our new brow tint') to bring a specific client back.

Redemptions are tracked in the CRM timeline and roll into monthly revenue reports.

Reviews & satisfaction follow-ups

Two hours after an appointment ends, an AI-generated SMS asks the client how it went. Happy replies are routed to Google/Yelp review prompts; unhappy replies are flagged for the owner immediately.

Reply sentiment is analyzed by Gemini so you catch issues before they hit public review sites.

MyFamilyPulse (client gift)

MyFamilyPulse is the family reminder platform you can gift to clients. It sends warm, personalized birthday and anniversary emails to their loved ones — the client's brand stays top-of-mind every time Grandma opens hers.

Give the FAMILY90 code for a free 90-day trial. When it expires, clients see a banner asking them to call to continue.

Platinum plan includes personalized video embeds and unlimited reminders.

MONEY

Point of sale — three choices

We support a tri-level approach so you match your budget and volume:

- Lightspeed Retail — full retail POS with deep inventory, best for salons with a boutique shelf.
- ClientPulse Pay — our built-in POS using Stripe Payment Links, tap-to-pay on phone. No terminal to buy.
- Manual entry — record cash or external card sales into the ledger.

Whichever you use, every sale flows into the client timeline and payroll.

Payroll, commissions & booth rent

- Commission stylists — set a percentage per service and per retail product; runs are calculated automatically.
- Booth renters — track rent due, payments received, and generate 1099-ready reports.
- Payroll runs — approve a run and export to your payroll provider.

Your ClientPulse subscription

Three tiers, all with a 10-day free trial and no credit card required:

- Silver — $59/mo, 2–10 providers, core booking + CRM.
- Gold — $119/mo, up to 20 providers, most features.
- Platinum — $199/mo, unlimited users, everything on.

Manage or upgrade at /pricing.

PARTNERS

Client Pulse Consultant (CPC) program

CPCs earn 34% recurring commission on every paid subscription they refer. Each CPC gets a unique signup code to share.

- Generate codes and track referrals at /admin/commissions.
- When a referred trial converts to paid, the CPC gets an automated thank-you email.
- A detailed monthly recap goes out on the 13th of every month.
- Training manual lives at /cpc/training (15 sections).

SETUP

Email deliverability

For best inbox placement, connect your own sending domain in Setup → Email. We handle SPF, DKIM, and DMARC records; you paste them into your DNS.

Until your domain is connected, we send from our shared domain, which is fine for testing but may hit promotions folders for cold outreach.

Install as an app (PWA)

ClientPulse works as a Progressive Web App — no App Store install required.

- iPhone: open clientpulse.ltd in Safari, tap Share, then 'Add to Home Screen'.
- Android: open in Chrome, tap the menu, then 'Install app'.
- Desktop: click the install icon in the address bar.

The installed app runs full-screen with your salon icon on the home screen.

TROUBLESHOOTING

Common issues

- Booking link opens the wrong page — make sure you're sharing /book/{slug}, not /booking (which is the marketing page).
- SMS reminder link says 'Forbidden' — this was a preview-only bug, fixed. All outbound links now use clientpulse.ltd.

- Voice booking is slow — the client should tap the pulsing purple Done button; auto-stop is disabled so it stays visible.
- Client can't check in with Glide-In — links expire after the visit; ask them to re-book if the appointment already passed.

Still stuck? Tap the Help button (bottom-right) or call 386.286.8013.