SAY HI TO YOUR NEW ASSISTANT

Sparkle Assistant

HOW TO PURCHASE, CUSTOMIZE & USE YOUR SPARKLE ASSISTANT

BROUGHT TO YOU BY: WE SPARKLE CO.
1. Go to [https://www.wesparkle.ai](https://www.wesparkle.ai) and select "Purchase Assistant" in the chat (or text "hi" to 651-349-4918 and reply "purchase assistant" or just "purchase" or "assistant")

2. Choose the subscription plan you want:
   - **Monthly**: $29/month
   - **Annual**: $300/year ($25/month, save $48)

3. This will open up the payment screen in a new tab on your device.
1. Fill out all the appropriate information to purchase your Sparkle Assistant

2. Required fields are denoted by an asterisk (e.g. business phone) and others are optional (e.g. home phone).

3. Click the "Subscribe" button at the bottom.

4. This will take you to a screen where you can pick your Sparkle Assistant phone number.
1. Each Sparkle Assistant comes with its own unique phone number. You can use it as your business number to help keep work + personal life separate!

2. We will present a few numbers to select from (we try to find numbers in your area code based on your business/shipping address). If you need to change this, please email us info@wesparkle.co.

3. Select the phone number you want to use in a timely manner as the numbers can get snatched up by others if you wait too long!

4. After you select your number, you will be sent to login for the first time. If you want to sync a Google Calendar with your Sparkle Assistant, we recommend you sign in with the Google account that uses the calendar you want to sync.
1. Log in to your account (if you want to easily sync your Google calendar, use "Sign in with Google" and select the account that has the Google calendar you want synced).

2. After login, you'll be directed to the "Account Settings" page of your account where you can see the phone number + booking URL that people can use to schedule with you. You can generate an email signature here that we recommend you share with your contacts so they know how to schedule with you!

3.) This is also where you can integrate your Zoom account, sync your Google Calendar, customize answers to FAQs, and limit the number of appointments that can be scheduled each day.
1. Your Sparkle Assistant: Your business name, Sparkle Assistant number, and booking URL are in this box. You can generate an email signature here which you can copy and paste into your emails so people know how to schedule time with you. People can just text “hi” to your Sparkle Assistant number or go to your booking URL.

2. Zoom: Sparkle Assistant has been approved to be in the Zoom marketplace so you can integrate your Zoom here (even free accounts) or create a new account if you don’t already have one. If you change Zoom accounts, you can always uninstall and install your new account.

3. Google Calendar Sync: This is where you can sync your Google Calendar. You can always remove the sync and sync up a different Google Calendar if you want too.

4. Work/Life Balance: This is where you can set the maximum number of appointments that can be booked with you in a given day. Sometimes people only want to have so many meetings a day!

4. Your FAQ: Sparkle Assistant 1.0 can answer basic questions from your contacts like “Where are you located?” and “What is your cancellation policy?” and you can customize the default answers here. If you want to customize your FAQs more, email us at info@wesparkle.co.
1. **View by List, Week, Month**: When you select "Schedule" from the drop-down menu, you will see the list view of your appointments. You can also view by the week or the month.

2. **Add Appointments**: If you need to add an appointment, tap the "+ADD" button and select the appointment type you want to add. Then select the time slot you want for the appointment.

3. **Block Time Off**: If you need to block time off for vacations etc., tap the "-BLOCK" button and put in the start/end dates and times.

4. **View Today’s Meetings**: Tap the "TODAY" button to go straight to today’s meetings.

5. **Navigate Back or Forward**: Use the back and forward arrows to navigate to different days, weeks, or months.
1. This is where you can set your regular work hours for when you are open for business or available for appointments/meetings.

2. The default is 9:00 am - 17:00 (5:00 PM) CST on Monday through Friday, but you can easily add and delete your regular work hours here.
You have one appointment type set up by default. However, you can customize it by clicking on that box. You can also click the blue "Create Appointment Types" button to create a new appointment type.

1. **Appointment Type Name**: This is what you call your appointment (e.g. Zoom w/ Michelle).
2. **Duration**: This is how long you want this appointment type to be (e.g. a 30 minute Zoom).
3. **Buffer**: If you want to ensure you have time between appointments, add buffer time so that your appointments are not booked back to back. Everyone needs bio breaks! :-)
4. **Location**: This is where you can name the location of this appointment (e.g. Zoom Link, Michelle will Call You, or Your Business Address).
5. **How the appointment is displayed to your contacts**: This is the name displayed for your contacts to see.
6. **Additional Confirmation Message**: This is an additional message that your contacts can see after their booking is confirmed. Some people use this to remind contacts to mask up or to send out a form for contacts to fill out before their appointment.
7. **Availability**: These are the times that are available for this particular appointment type. Sometimes people only do certain types of appointments on certain days or certain times. These times should fall within your regular work hours, but can be a more specific time frame.
1. This is where you can view all the conversations that your Sparkle Assistant has with your contacts to book appointments. You can navigate by clicking through to see the previous day or the next day.

2. You can also text message your contacts from your Sparkle Assistant number on this page.
1. When you subscribe, **you will receive 3 emails** from support@wesparkle.ai: your first invoice, a confirmation email notifying your subscription was successful (which includes the setup link if you didn't already complete setup of your Sparkle Assistant and login), and the portal invitation.

2. The portal invitation email from support@wesparkle.ai (subject line: "We Sparkle Co. has invited you to join their portal") has an "Accept Invitation" button in the email. Click this to sign into your client portal. This is where you can check your subscriptions, invoices, payments made, and statements. To check your Sparkle Assistant calendar, settings, and customizations go to https://www.weparkle.ai.
Thank you for subscribing to our Sparkle Assistant! We hope it helps you save time and frustration going back and forth over email to schedule calls, Zoom sessions, or other appointments.

We are an early-stage company and always welcome feedback, requests, or suggestions on ways to improve the Sparkle Assistant. Many of Sparkle Assistant's features were requested by our customers. Please feel free to email us at info@wesparkle.co or schedule a call/Zoom with us by texting "hi" to our Sparkle Assistant at 651.349.4918 or using the chat at https://www.wesparkle.ai.

We are happy to work with you to customize your Sparkle Assistant to best fit your needs as others may find your feature request useful as well!

We appreciate your support! As a public benefit corporation, we are dedicated to building a stronger and more inclusive economy by helping underestimated entrepreneurs use our tools to save time and increase their revenues. We regularly donate to, and volunteer at, nonprofits that support underestimated entrepreneurs. Please email us at info@wesparkle.co if you are interested in partnering with us, licensing our Sparkle Assistant for resell, or investing in us. Thank you!