

ASCP Edition

Frequently Asked Questions

What is included?

- **Why should I use the [ASCP Edition of PocketSuite](#)?**
 - The ASCP Edition powered by PocketSuite is a powerful, all-in-one business app that supports you in managing your schedule, clients, and payments while providing you timely resources and business tips directly from ASCP on how to run and grow your business.

- **What are the different ASCP Edition Plans?**
 - *ASCP Basic Plan:* This free plan is available exclusively to ASCP members and comes with core business features including scheduling, online booking, payment processing, digital forms and contracts, client management, and more!
 - *ASCP Premium Plan:* This plan costs \$24.99/month and includes all of the Basic plan features plus premium offerings such as packages, subscriptions, classes, repeat appointments, and products, the ability to mark off-platform payments as paid and process buy now pay later transactions, unlimited business texting, and marketing features including text marketing and Google reviews integration.
 - *ASCP Team Plan:* This plan starts at \$34.99/month for two additional team members and has all of the Premium plan features plus team management features, including scheduling team members, payroll, assigning tasks, and team messaging. Additional team members cost just \$9.99/month, or you can get unlimited team members for \$99.99/month.

- **How does the ASCP Edition compare to PocketSuite's standard plans?**
 - The ASCP Edition comes pre-loaded with ASCP recommended forms, contracts, services, and more to help you run your business with their expert advice. PocketSuite also does not offer a free plan to the general public, but the ASCP Basic plan includes several premium features for free such as scheduling, payment processing, and digital paperwork. Additionally, the ASCP Edition delivers timely ASCP curated content, business tips, and resources exclusively for ASCP members to help you run and grow your business, stay updated on industry trends, and benchmark your progress.

- **Does the ASCP Premium Plan include any discounts for ASCP members?**
 - ASCP members receive 15% off (\$45 discount for solo professionals) when they purchase an annual plan! This deal is exclusive to ASCP professionals, who can get a whole year of PocketSuite premium for only \$255. To take advantage of this offer, just reach out to PocketSuite from the messages section of your account or email support@pocketsuite.io and say "I'd like to claim 15% off an annual plan as an ASCP member".

- **What are your processing fees?**
 - Our processing fees are among the lowest in the industry at 2.9% + 30¢ per transaction. It's a flat rate. There are no hidden fees.

- **What if I am currently processing payments through Venmo, Zelle, Square, PayPal, or another payment provider?**
 - *Venmo:* With Venmo, when clients pay you using a credit card through Venmo, Venmo does charge a processing fee of 3%.
 - *Zelle:* Most clients opt to make payments with a credit card. It is not currently possible for clients to make credit card payments through Zelle.
 - *Zelle & Venmo:* Neither Zelle nor Venmo can provide you with clean reports on just your client-related payments for taxes and your other accounting needs. However, suppose you have clients that prefer to process payments through Zelle or Venmo. In that case, you can accept client payments through those providers and then “Mark Paid” the appointment or invoice in PocketSuite so you can track all of your income in one place with beautiful reporting.
 - *Square:* Square has a higher processing fee than PocketSuite for online (keyed-in transactions) payments of 3.5% + 15¢ per transaction compared to lower PocketSuite rates: 2.9% + 30¢ per transaction. Online payments are typically collected when your client books you online and pays a deposit, purchases a package, pays for a subscription/membership, or pays an invoice. These payments are the majority of the payments that Pros process on PocketSuite.
 - *PayPal:* PayPal’s payment processing rate schedule [here](#) will likely make your head spin. Their fees vary based on the type of card, card-present vs. not present, location, and many other factors. However, for online payments (keyed-in transactions), PayPal’s rate is 3.49% + 9¢ per transaction compared to PocketSuite’s lower rate of 2.9% + 30¢ per transaction.

- **How long does it take to get a deposit in my account?**
 - One business day is our [standard processing time](#) to deposit client payments into your bank account.
 - PocketSuite also offers [instant deposits!](#) Instant deposits require an instant-eligible debit card and cost an additional 1% fee, allowing you to get your money deposited into your account instantly!

- **Are there any hidden fees?**
 - There are absolutely no hidden fees or charges. We value our Pro community and want to be completely transparent with you in helping you run and grow your business.

How do I get started?

- **Where can I get more information?**
 - To learn more, sign up for a [Welcome Call](#) to talk to one of our team members! Also, check out our [How It Works](#) page and the [PocketSuite Suite Center](#).

- **I’m in! How do I signup?**

- Great! [Click here](#) to register for the ASCP Edition and then head to the [AppStore](#) or [GooglePlay](#) to download the PocketSuite app. Once you register, you can also sign in online at [desktop.pocketsuite.io](#).
- ***I signed up but I'm not on the ASCP Edition. How can I switch over?***
 - Just send a message to PocketSuite support in-app or email us at support@pocketsuite.io with your ASCP member ID and say you'd like to be moved over to the ASCP edition of PocketSuite. This might've happened if you already had a PocketSuite account before signing up for the ASCP edition, but it's no problem for us to move you to the ASCP edition of PocketSuite!
- ***Do you provide demos? Can I get a walk-thru of each of the features in the ASCP Edition?***
 - Yes! Here is a demo of the ASCP Edition Powered by PocketSuite.
 - [ASCP Edition Onboarding Walkthrough](#)
 - You can also check out our [Foundations](#) and [Growth Lab](#) YouTube Playlists for more tutorials on specific features.
- ***Can I talk to someone about my specific workflow and business needs? I am not sure yet whether it will work for me.***
 - One of our team members would be happy to work with you! [PocketSuite Academy](#) has video tutorials, live [Welcome Calls](#), and upgraded support options.
- ***I am switching from another booking app. Can I get help in transitioning my clients and business information?***
 - Certainly! Our imports team is happy to help you migrate your client list, service offerings, booked appointments, active packages, subscriptions, intake, and other forms, waivers, and contract templates! You can send anything you'd like the PocketSuite team to import into your ASCP Edition account to support@pocketsuite.io. Please be sure to include your PocketSuite login number (i.e., mobile number) in the email so that the team can confirm your account information before completing the import.
 - We have also created self-serve guides for transitioning your client and business information to the ASCP Edition powered by PocketSuite from [Booksy](#), [Schedulicity](#), [Schedulista](#), [Rosy](#), [Square Appointments](#), [Acuity](#), and [Vagaro](#).
- ***I already set up my account but I want to go back and add recommended forms, contracts, and default items. How do I do that?***
 - One of the most powerful features of the ASCP Edition are the recommended forms, contracts, and default items created by the experts at ASCP. If you've already set up your account and decide you want to add more of these defaults to your account, head to Settings and click the setting you want to add the default for. From here, click the plus button in the upper right of your screen and choose "Select From Defaults" from the popup menu. This will show you all the recommendations you have not already added to your account. For example, to add a recommended form, head to Settings > Forms > Plus > "Select From Defaults" > Select Form(s) from list.

Will I be able to...

- **Use the ASCP Edition on Desktop as well?**
 - The ASCP Premium Edition is available on all platforms, including mobile devices, tablets, and desktop! Once you register, you can also sign in online at desktop.pocketsuite.io.
- **Connect my Google Calendar, iCalendar, or other calendars to PocketSuite?**
 - Yes! Check out [this article](#) from the Suite Center to learn more about how to sync your personal calendar to PocketSuite and vice versa. You can say goodbye to double booking challenges - forever.
- **Allow my clients to book me online? Where can I find my online booking link?**
 - Yes! You can add your booking link or widget to your website or social media to start getting booked online. You can find your booking link by logging into the mobile app and tapping on Settings > Online Booking > Share to copy or share your booking link. [Here](#) is what your clients will see when they book you online.
 - If you would like to add your online booking site to your social media pages (i.e., Instagram, Facebook), [here is how](#). If adding widgets to a website built on the ASCP web builder, follow [these](#) special instructions.
 - If you need help adding your online booking site to your website, that is why we're here. Please send us an email at support@pocketsuite.io with your website address and login information, and we'll add the booking link(s) wherever you like on your website. If you'd like to do it yourself, you can access the "How to?" instructions on how to do it by logging into the mobile app and tapping on Settings > Online Booking > Share to send instructions. The instructions will be sent to your email on file, and you can take it from there.
- **Customize my booking site?**
 - Yes, absolutely! In the mobile app, under the Marketing Suite section in Settings, you can tap Settings > Online Booking to add your business' logo and add a hero image on your booking site or your company's primary color. You can make these updates by logging into the mobile app and tapping Settings > Online Booking.
- **Send appointment reminders?**
 - Yes! All ASCP plans include the ability to send text or email [automatic appointment and payment reminders](#), as well as appointment confirmation messages, to ensure your clients never miss an appointment. Plus, you can charge [booking deposits](#) and set [enforceable cancellation policies](#) to make sure clients value your time as much as you do.
- **Collect sales taxes?**
 - Our sales tax feature is another way we help you save time, energy, and money. By turning on the sales tax feature, you can automatically collect sales tax based on your zip code or even your client's zip code by turning on the sales tax feature! Learn more [here](#).
- **Keep internal client records?**
 - PocketSuite supports fully customizable [client fields](#), digital [forms](#) and [contracts](#), and [sub-accounts for family members](#) to make sure you're always collecting all necessary

information and protecting yourself from liability. You can attach fields, forms, and contracts to specific services to make sure you have the right paperwork on file before every appointment.

- And, as part of ASCP's partnership with PocketSuite, we worked closely to develop a comprehensive list of forms, contracts, and internal client fields, which you can complete and save to your clients' profiles for easy reference!

- ***Integrate with Quickbooks?***

- PocketSuite does not currently have a direct integration with QuickBooks. Still, we do make it incredibly easy to export your data to a QuickBooks compatible file so that you can import your PocketSuite income and other data into Quickbooks with one click. To learn more, click [here!](#)

- ***Export my data?***

- Yes! PocketSuite makes it incredibly easy to export your data. Just head to Settings > Data Export and choose from various export options for any period! Learn more [here](#).

- ***Sell products?***

- Yes! You can set up an [online products store](#) and sell products for shipping or in-store pickup. Customers can purchase products from your online shop link or your online booking link. And, you can track product inventory, set shipping rates, and include processing times for in-store pickup.
- PocketSuite also supports selling add-on products to customers booking appointments with you. Our add-on products feature allows you to set which products are recommended for which services, so when a customer books an appointment with you online, they'll see relevant product recommendations based on your criteria.

- ***Text my clients?***

- Yes! The ASCP premium edition of PocketSuite comes with unlimited business texting between you and your customers. Keep your business and personal lives separate by managing all communications with customers from the messages tab of your PocketSuite account. You can also send any PocketSuite transaction to customers via text, from invoices to bookings to contracts, so they can check out right from their phone or text you back if they have any questions.
- Texts from premium accounts are sent from a toll-free number by default, and if you want a [local number for your business](#), you can upgrade to a dedicated business line for only the one-time \$25 registration fee. This fee will cover issuing your new local business number and a TCR registration to ensure your business text messages are always delivered. As of September 1st, 2023, all local business numbers in the United States require a TCR registration to ensure your business text messaging, including appointment confirmations, reminders, receipts, and direct messages to clients, are delivered. Learn more about [TCR requirements here](#). Customers can save this number in their contacts so they always know where to reach you, and any calls to your local number can be forwarded to your cell or any other number.

- ***Port my existing business number?***

- Absolutely! You can port your number into PocketSuite. Be sure that the number you are looking to port is not the cell phone login number that you use to log into your PocketSuite account. You have two options for porting:(1) Pay a one-time fee of \$50 or (2) become an annual subscription plan subscriber.

Other questions that I have.

- ***Do my clients have to download the app?***
 - No, they do not! You can send your clients appointments to confirm, invoices to pay, packages or subscriptions, forms to complete, and contracts to sign. They can click on a link on their phone, desktop, and tablet to complete any of those transactions. While your clients do not need to download the [client app](#), some do anyway to keep their entire history with you in one place.
- ***Where can I reach out for help when I have questions?***
 - Just send a quick message to PocketSuite Support through the Messaging section of the app to get answers to all your questions! The PocketSuite Support team is online and excited to answer your questions seven days a week between 10:00 am-8:00 pm Eastern on weekdays and 12pm-8pm Eastern on weekends. You can also email us at support@pocketsuite.io, schedule a call [here](#), or text us at (415) 841-2300.
- ***Can I add team members to my account?***
 - Definitely! All you need to do is upgrade to the ASCP Team Edition by going to Settings > Change Plan > ASCP Team Edition > Save. Then head to the Homescreen > Team Members to add new staff or a business partner to your account! Learn all about how to add and manage team members [here](#).
- ***I'd love to switch to PocketSuite but I don't have time to set up my account. Do you offer any advanced support options?***
 - Yes! Check out our [White Glove Service](#) to get connected with a dedicated account manager who will get to know your business and help you reach your goals. They'll even help set up your account according to your instructions!

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