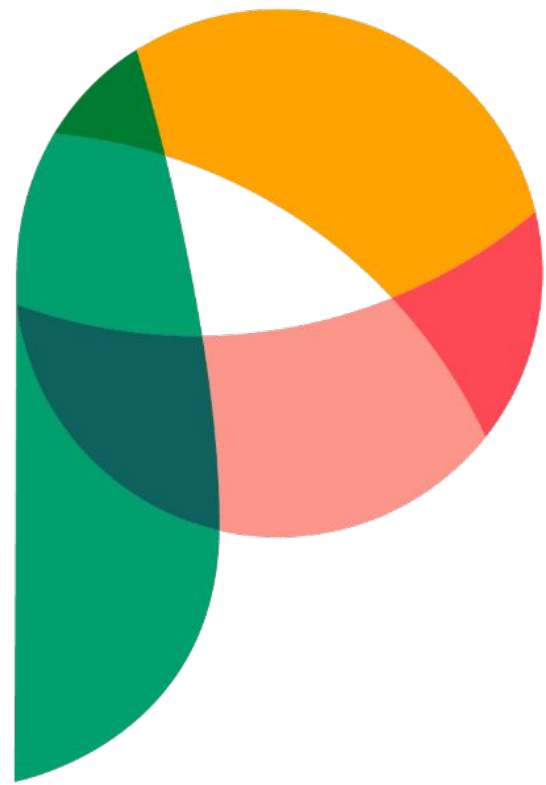




Phorest

**Online Store &
Expert Recommendations**

Contents:

Step 1: Setting up your Online Store

Step 2: Marketing your Online Store

Step 3: Dispatching orders from online store

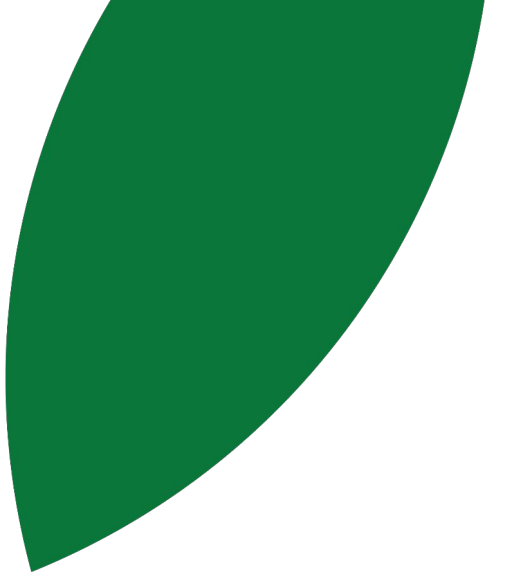
Step 4: Online Store reporting

Step 5: Sending Expert Recommendations

Step 6: Expert Recommendations Reporting



Online Store



Before you begin...



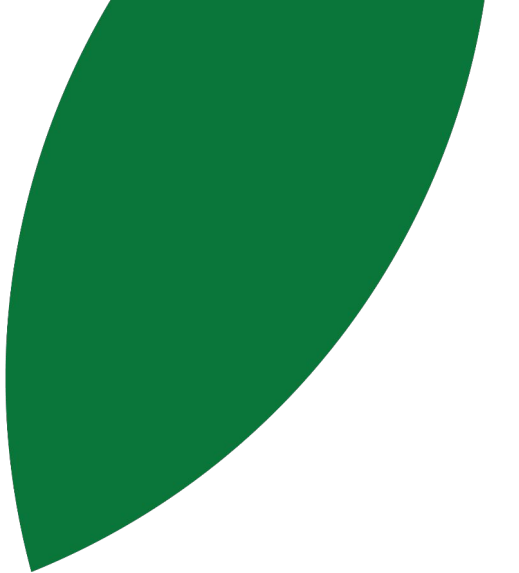
Before you can start using your online store, we recommend you complete the basics of stock control.

- Eg Ensure your products exist with barcodes,
- Ensuring that your stock levels are correct

A full guide to setting up your stock control can be found [here](#)



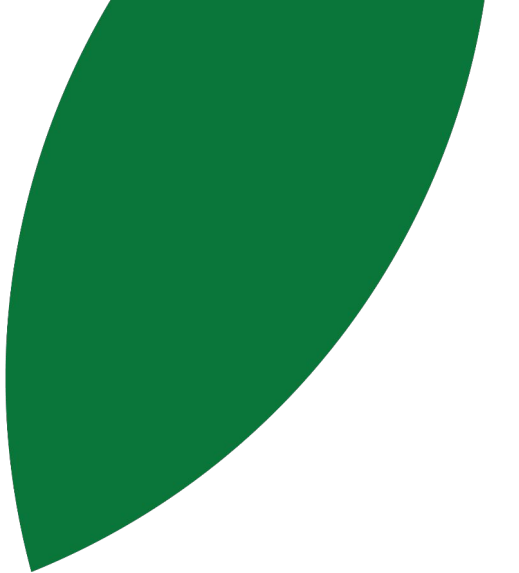
What you need to know...



Cost:

- Online Store transactions are subject to a 2.8% processing fee + GST unless you are on Starter or Grow packages where the processing fee is 5% + GST
 - All fees will be deducted before the payout is deposited in your bank account via PhorestPay.
 - Expert Recommendations uses the standard SMS fee rate
 - Access to the Expert Recommendations feature can be restricted per staff access level
- 

Step 1: Setting up your Online Store



Products tab:

From the Online Store **Products tab**, click to select a Product

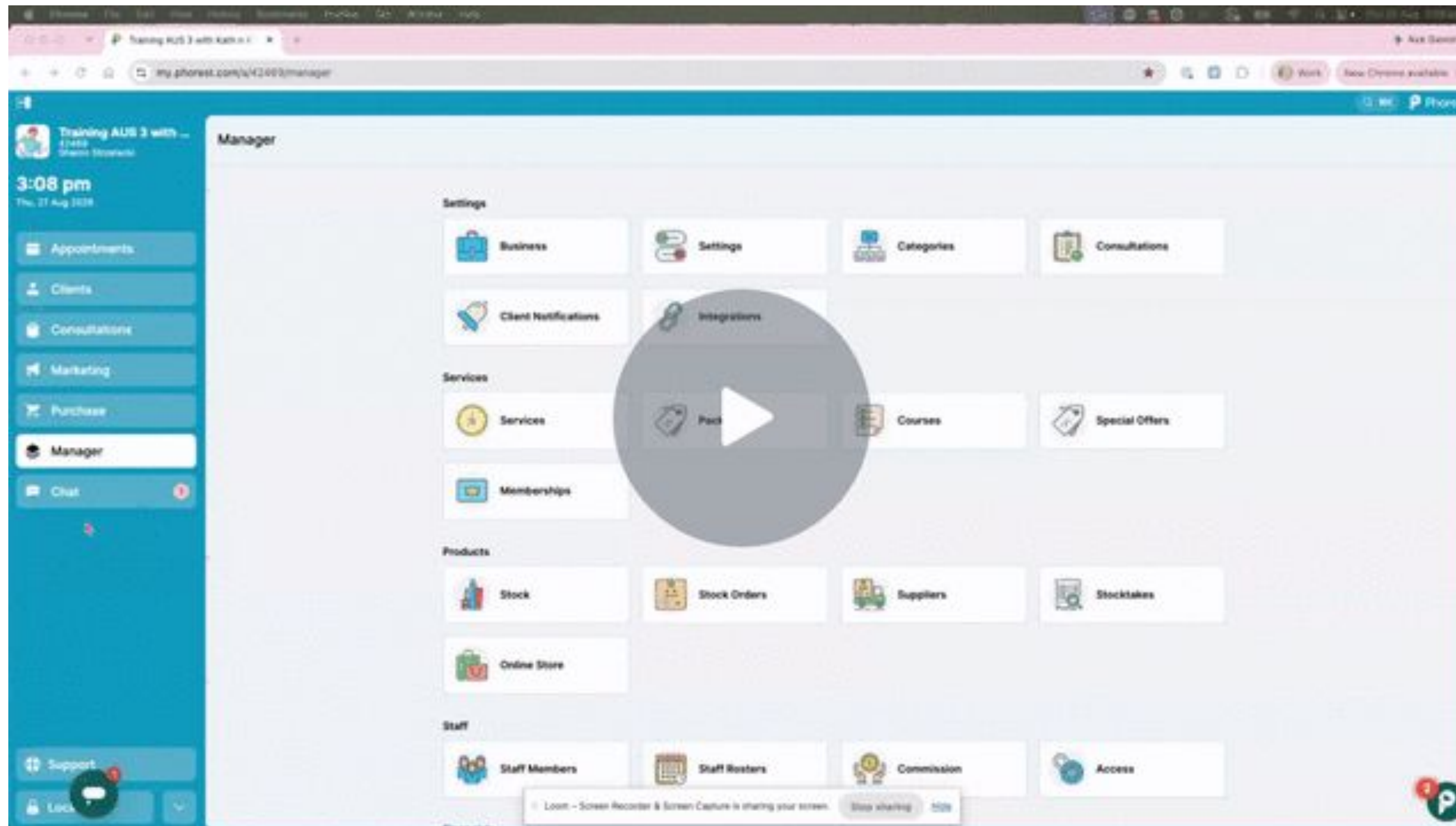
- Add in the image and description of each product:
 - If a barcode exists - try the Phorest Auto-fill or
 - Manually add photos and an online description
 - Adjust the price at the bottom if you sell it for a different price online
 - Enable the "Continue selling when out of stock" option if needed
 - Click Save

Settings tab:

In the Online Store go to **Settings tab**:

- In the Store tab:
 - Choose how to fulfil your orders
 - Set your Shipping charges / free shipping
 - Adjust the pickup location
 - Update your pickup instructions
 - Enable your online store
 - In the Policy tab and update your Policies
- 

Setting up your Online Store



Setting up your Online Store in Phorest - Watch Video

Online Store Links

Your Online Store will be available directly from your Online Booking Link:

Welcome to
Training AUS 3 with Kath n Kim - Location A

Make an Appointment >	Buy a Series >
Visit our Shop ↗	Buy a Gift Card

Online Store Links

Or using the Direct Links within the Online store > Products screen:

- Click "Copy Link" against the individual items or
- Click "Copy Store Link" at the bottom right hand corner of the page and add these links to a resource outside of Phorest eg website

Online Store

Products Orders (2) Promotions Settings

Search

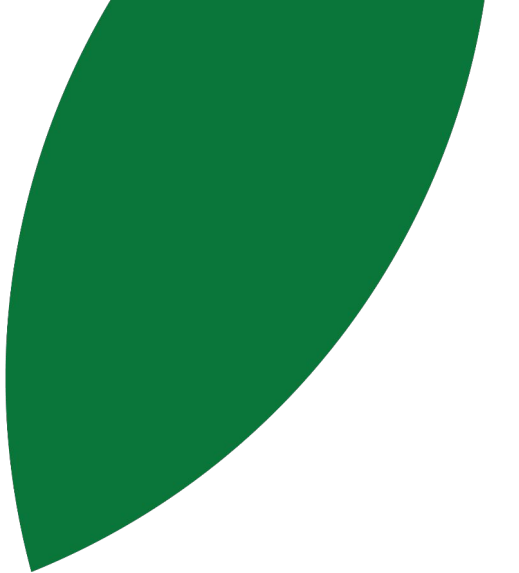
Brand **Nak Hair** Availability **Select...**

Product Name	Image & Text	Brand	Price	Stock	Available Online
Shine Mist Spray		Nak Hair	\$25.00	20	No Yes Copy link
Replends Moisture Mask		Nak Hair	\$40.00	20	No Yes Copy link
Hydrate Shampoo		Nak Hair	\$25.00	24	No Yes Copy link
Ultimate Potion Treatment		Nak Hair	\$25.00	20	No Yes Copy link
Ultimate Potion		Nak Hair	\$0.00	20	No Yes
Hydrating Conditioner		Nak Hair	\$29.95	25	No Yes
Signature Blowout Smooth Mist		Nak Hair	\$29.95	14	No Yes
Deluxe treatment xo		Nak Hair	\$29.95	0 1	No Yes

8 Products

Copy Store Link

Setting up Online Store Promotions



Step 1:

From the Online Store Promotions Tab, click Add

Step 2:

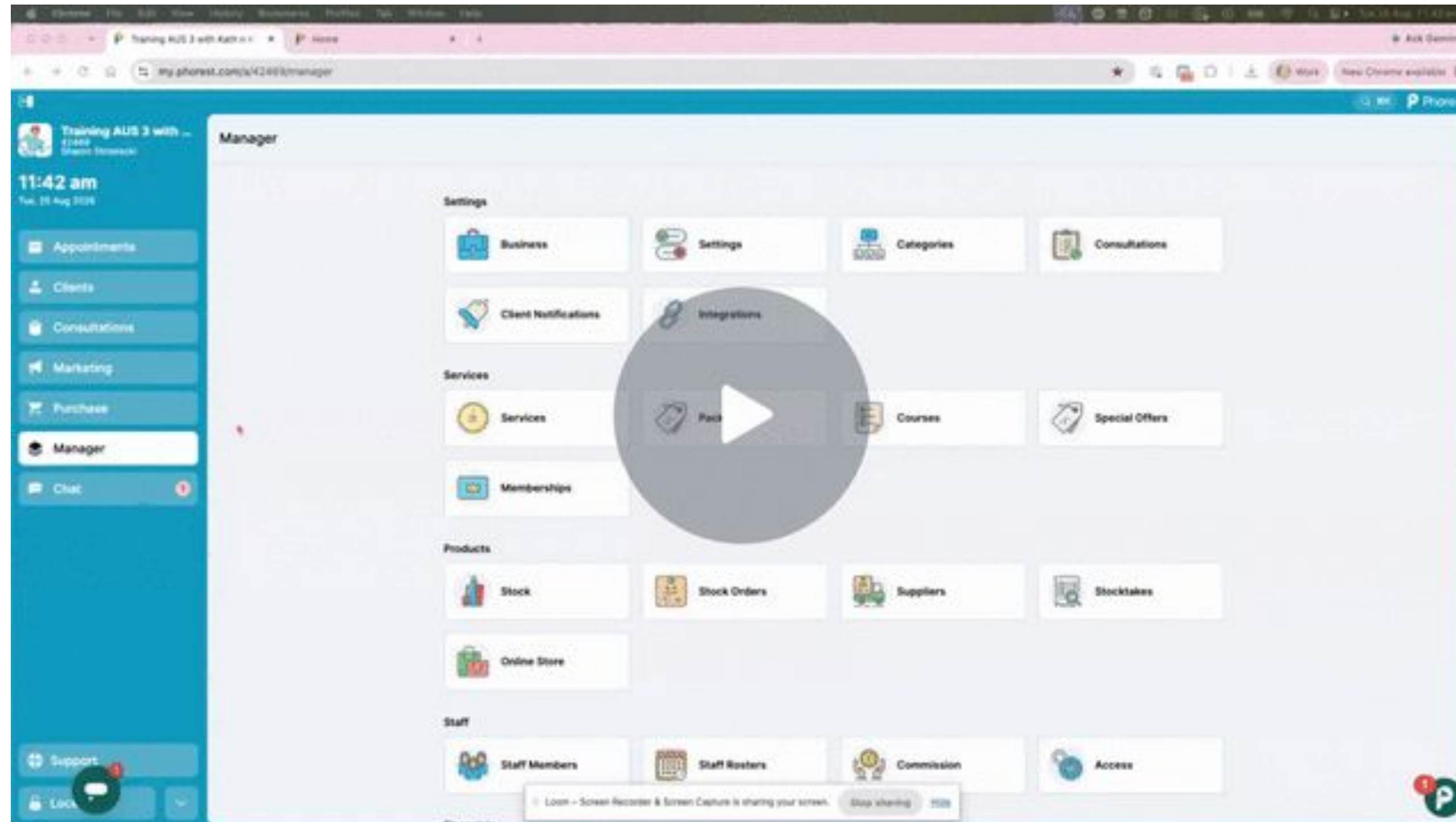
Create the promotion

- Add in the promotion Name
- Promo Code
- Discount % amount
- Promotion start date and time and end date and time
- Click Save

Step 3:

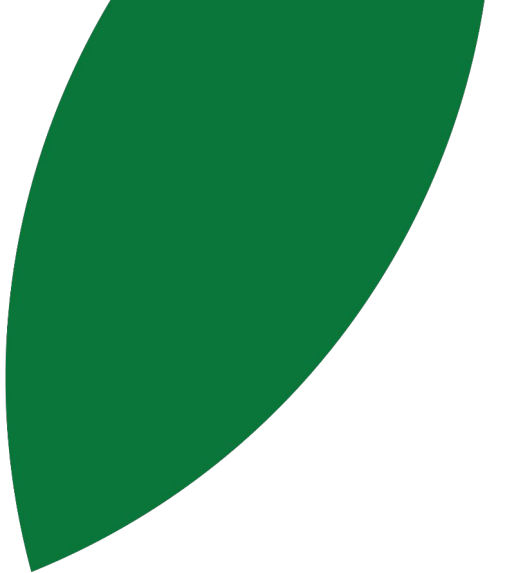
- Click copy to link this code to a Marketing campaign
- 

Create an Online Store Promotion



Creating a Promotion for your online store - Watch Video

Step 2: Marketing your Online Store



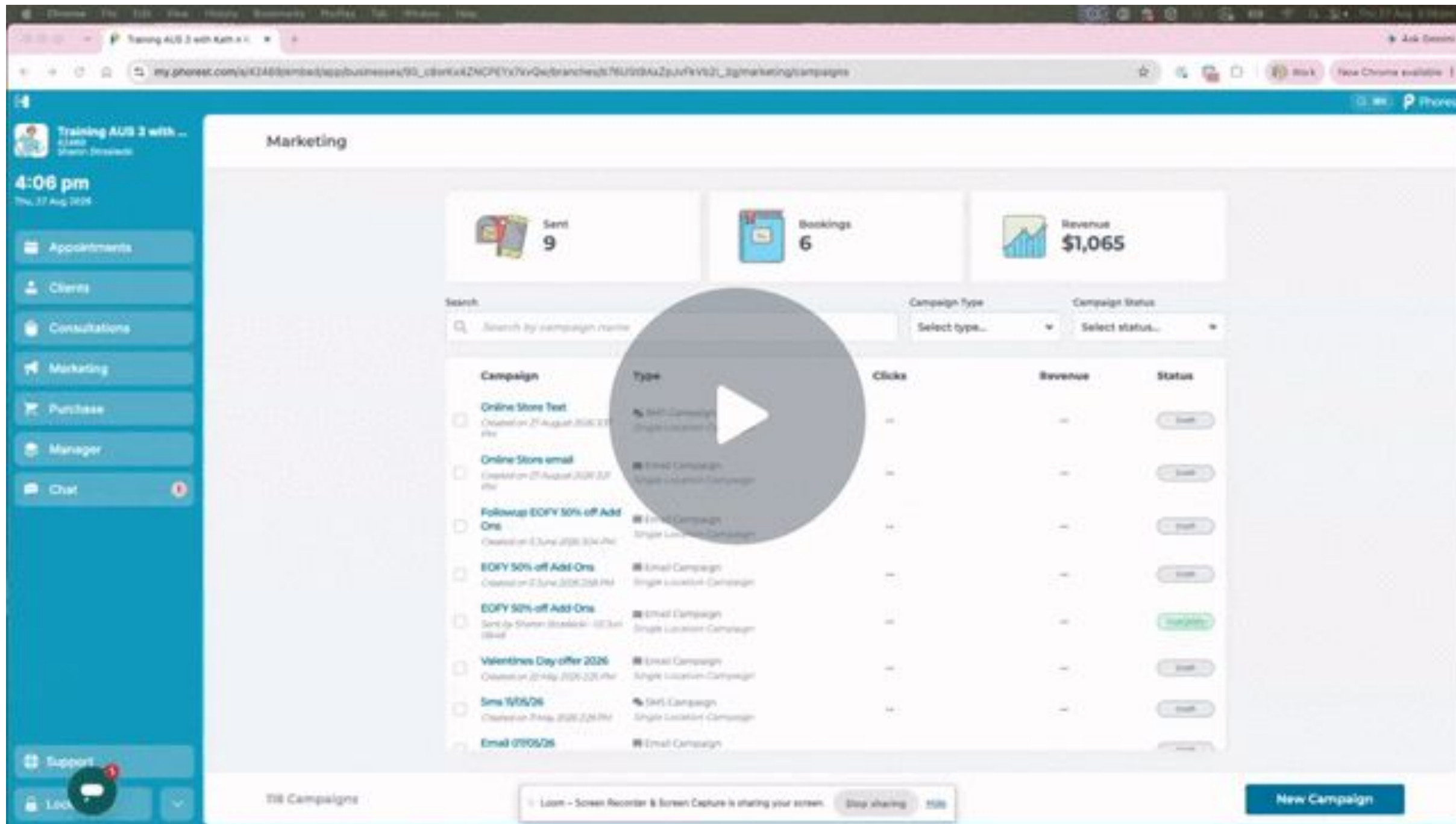
Creating your Online Store is not enough, let's share the news with your clients and make it easier than ever for them to shop for the products they love.

Add the direct links, promotion codes and images from your Online Store in a Marketing Campaign.

Helpsheets:

- [Marketing your online store](#)
 - [Create and send an email campaign](#)
 - [Create and send an SMS campaign](#)
- 

Marketing your Online Store



The screenshot displays the Phorest Marketing dashboard. At the top, there are three summary cards: 'Sent 9', 'Bookings 6', and 'Revenue \$1,065'. Below these is a search bar and filters for 'Campaign Type' and 'Campaign Status'. A table lists several campaigns, including 'Online Store Test', 'Online Store email', 'Followup EOFY 50% off Add Ons', 'EOFY 50% off Add Ons', 'EOFY 50% off Add Ons', 'Valentines Day offer 2026', 'Sms W05/26', and 'Email 0505/26'. A large play button icon is overlaid on the table. The bottom of the dashboard shows '108 Campaigns' and a 'New Campaign' button.

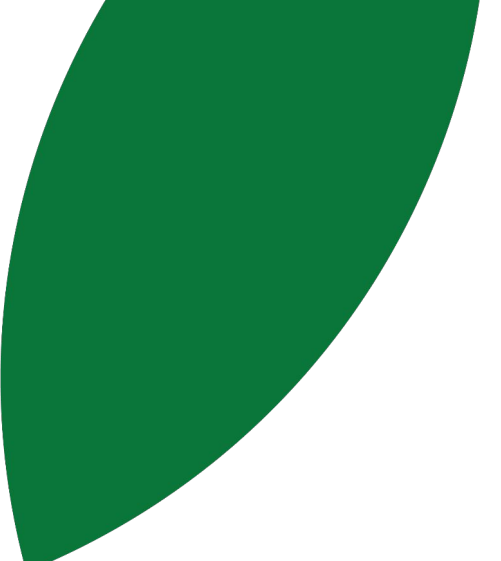
Campaign	Type	Clicks	Revenue	Status
Online Store Test	Text Campaign	--	--	Live
Online Store email	Email Campaign	--	--	Live
Followup EOFY 50% off Add Ons	Email Campaign	--	--	Live
EOFY 50% off Add Ons	Email Campaign	--	--	Live
EOFY 50% off Add Ons	Email Campaign	--	--	Live
EOFY 50% off Add Ons	Email Campaign	--	--	Live
Valentines Day offer 2026	Email Campaign	--	--	Live
Sms W05/26	Sms Campaign	--	--	Live
Email 0505/26	Email Campaign	--	--	Live

Marketing your
online store -
Watch Video

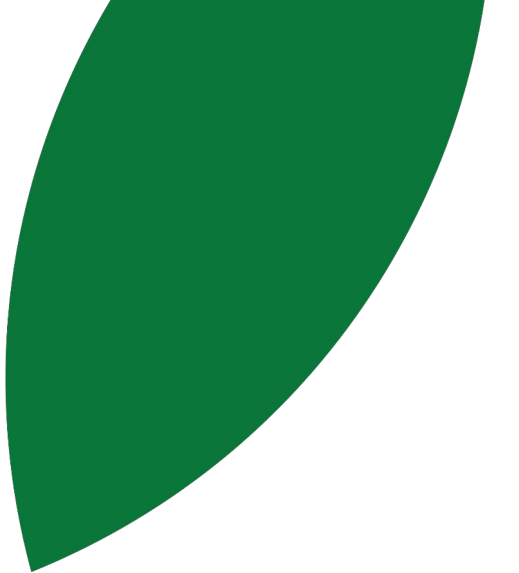
Next, your client places an online order...



Step 3: Dispatching Your Online Store Order



Step 3: Dispatching Your Online Order



Step 1:

From the Online Store Orders Tab, click to view the recent Order

Step 2:

Fulfill the order - ship or set aside for pickup

Step 3:

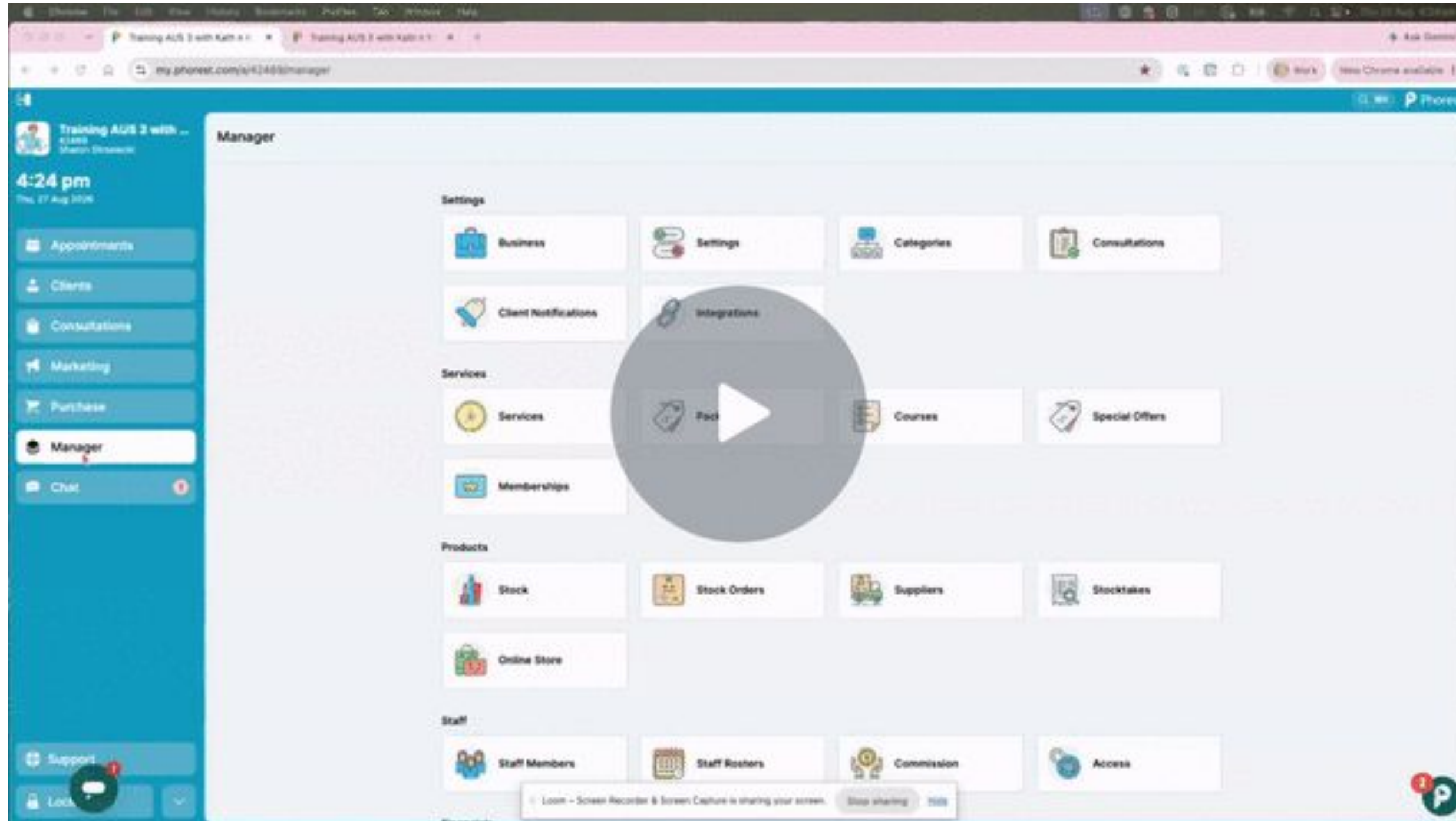
Adjust the Order Status

- Ready for Pick-up - notifies client again
- Complete
- Click Save

Helpsheets:

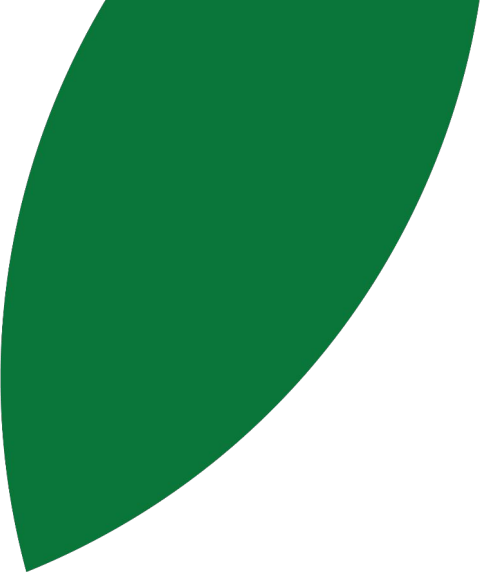
- [How can I offer In-Store Pick-up in my Online Store?](#)
 - [How do I receive the money from products sold on my Online Store](#)
 - [What notifications are sent when a client purchases a product in my Online Store](#)
- 

Dispatch Your Online Store Orders



Dispatching an Online Store Order - Watch Video

Step 4: Online Store Reporting



Step 4: Online Store reporting:



Manager > Sales screen

An online store purchase creates a sale transaction. There will not be a staff member listed against that transaction.



Manager > Reports > Additional Reports > Financial > Financial Totals

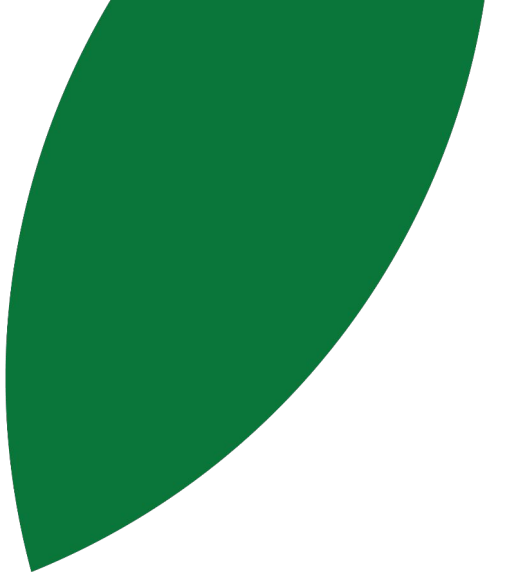
Listed as a Product Sale on the Financial Totals report in Additional Reports



Manager > Reports > Product Trends

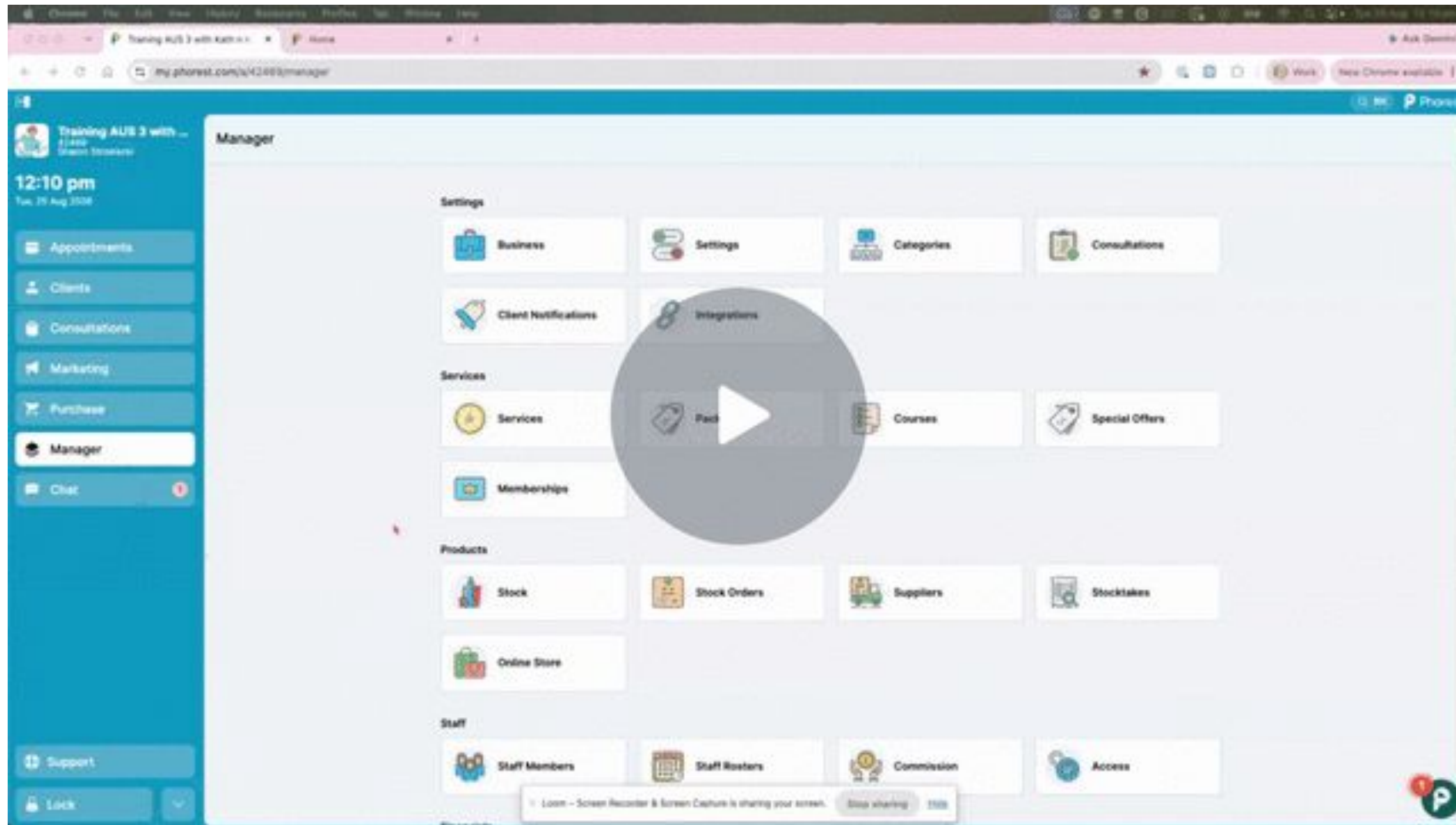
Online store v's product sales report

Step 5: Expert Recommendations



Expert Recommendations Access

How to enable security access to Expert Recommendations:



Enable Expert Recommendations on PhorestGo - Watch Video

Expert Recommendations

Online Store

As mentioned previously, expert recommendations requires you to have an active Online Store in Phorest.

What are Expert Recommendations and why send them:

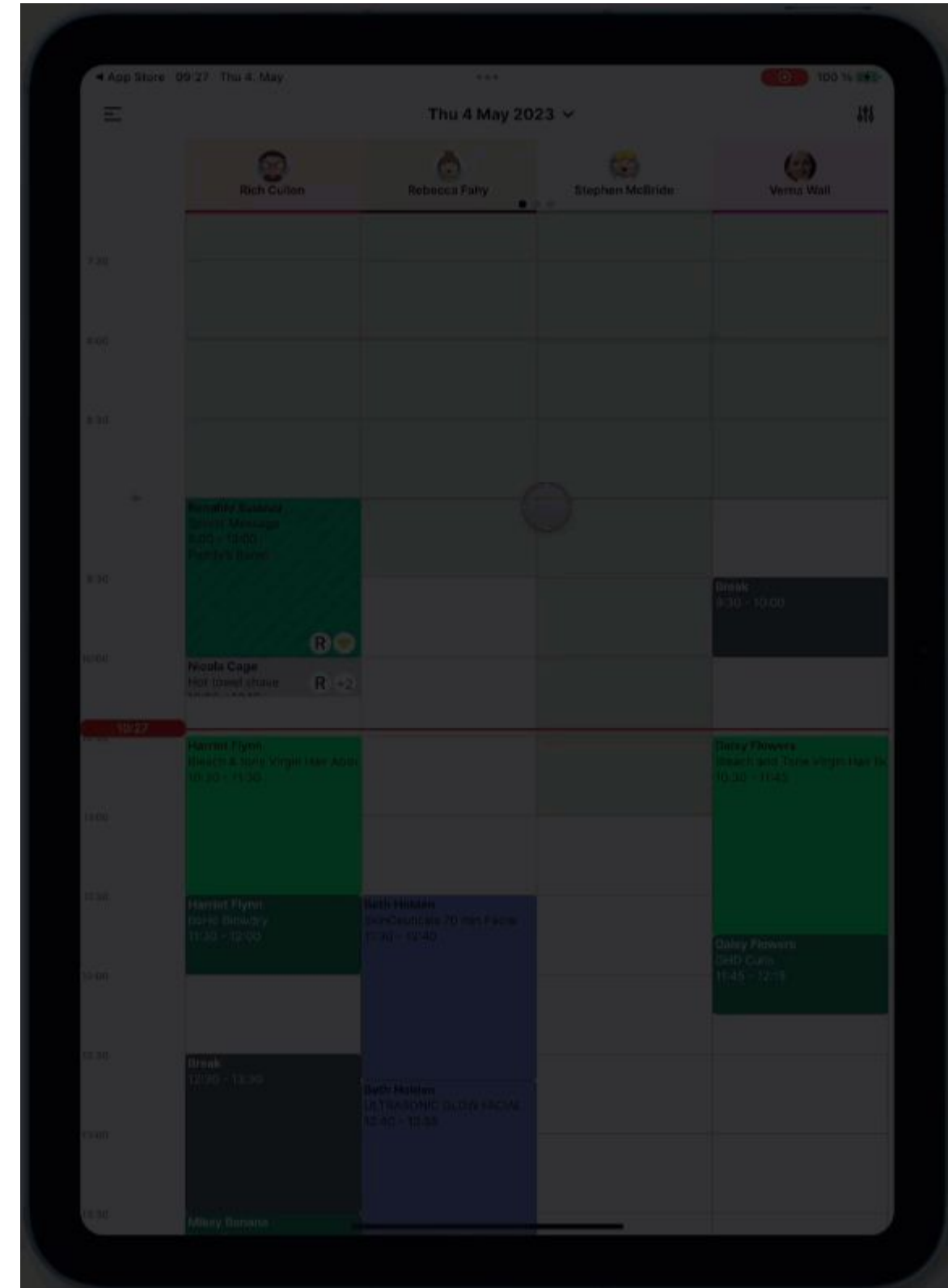
It's super important that the client is aware of the prescribed products they need to solve the issues they've highlighted on their consultation form.

Sometimes, clients may not be ready to purchase a recommended product during their appointment. Expert Recommendations enables staff members to send personalized retail product recommendations to clients via SMS, allowing clients to purchase the product(s) later in your Phorest Online Store.

We want clients to feel like they're getting support when they leave. We're not just selling products for the sake of selling products, they're genuinely prescribed by you the expert!

PhorestGo

Expert recommendations are only available on PhorestGo. The text message will be sent 24hrs later.

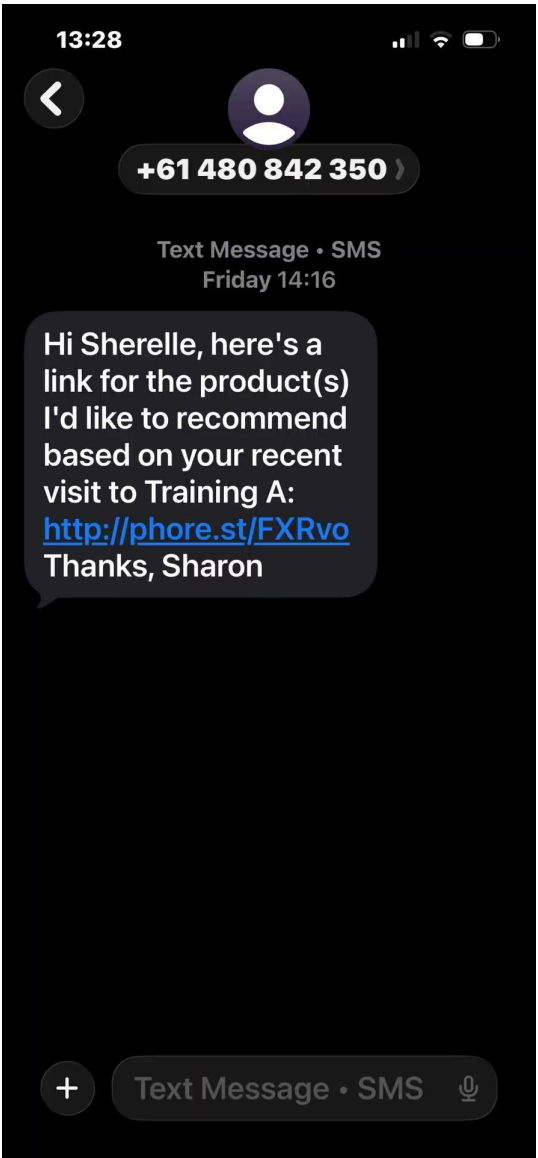


Expert Recommendations

Click to watch:
How to send an expert recommendation



Click to watch:
Purchasing a recommended product from a
client's perspective



Step 6: Expert Recommendation reporting:



Expert Recommendation sales for the business:

These can be accessed from the main reports dashboard under the **Finance** tab and expand the Sales figures



Expert Recommendation sales for each staff member:

You can view your entire team's individual performance with Expert Recommendations from the main reports dashboard under the **Staff** tab.

Expand on the Commission section to find the commission earned by each staff member through Expert Recommendations (*provided you use Commission in Phorest*).



Expert Recommendation sales on PhorestGo:

Staff members can see how many sales they've made through Expert Recommendations in the **My Numbers** section of My Performance.

Helpsheets: [Expert Recommendations reporting](#) and [How to use Expert Recommendations](#)

Quick Recap...

Step 1: Set up your Online Store

Step 2: Market your Online Store via your direct links

Step 3: Dispatch your Online Store orders

Step 4: Online Store Reporting

Step 5: Send out Expert Recommendations to your clients

Step 6: Expert Recommendations Reporting

Help Sheets

[How to setup Online Store](#)

[How can I offer In-Store Pick-up in my Online Store?](#)

[Marketing your Online Store](#)

[How do I receive the money from products sold on my Online Store](#)

[What notifications are sent when a client purchases a product in my Online Store](#)

[How to use Expert Recommendations](#)

Phorest Academy

[Online Store](#)

[Expert Recommendations](#)

Missing Features?

[Click here](#)

Phorest Grow Homepage

[Click Here](#)