



Phorest

2Way Chat, Front Desk AI, Cheat Sheet &
Smart Booking



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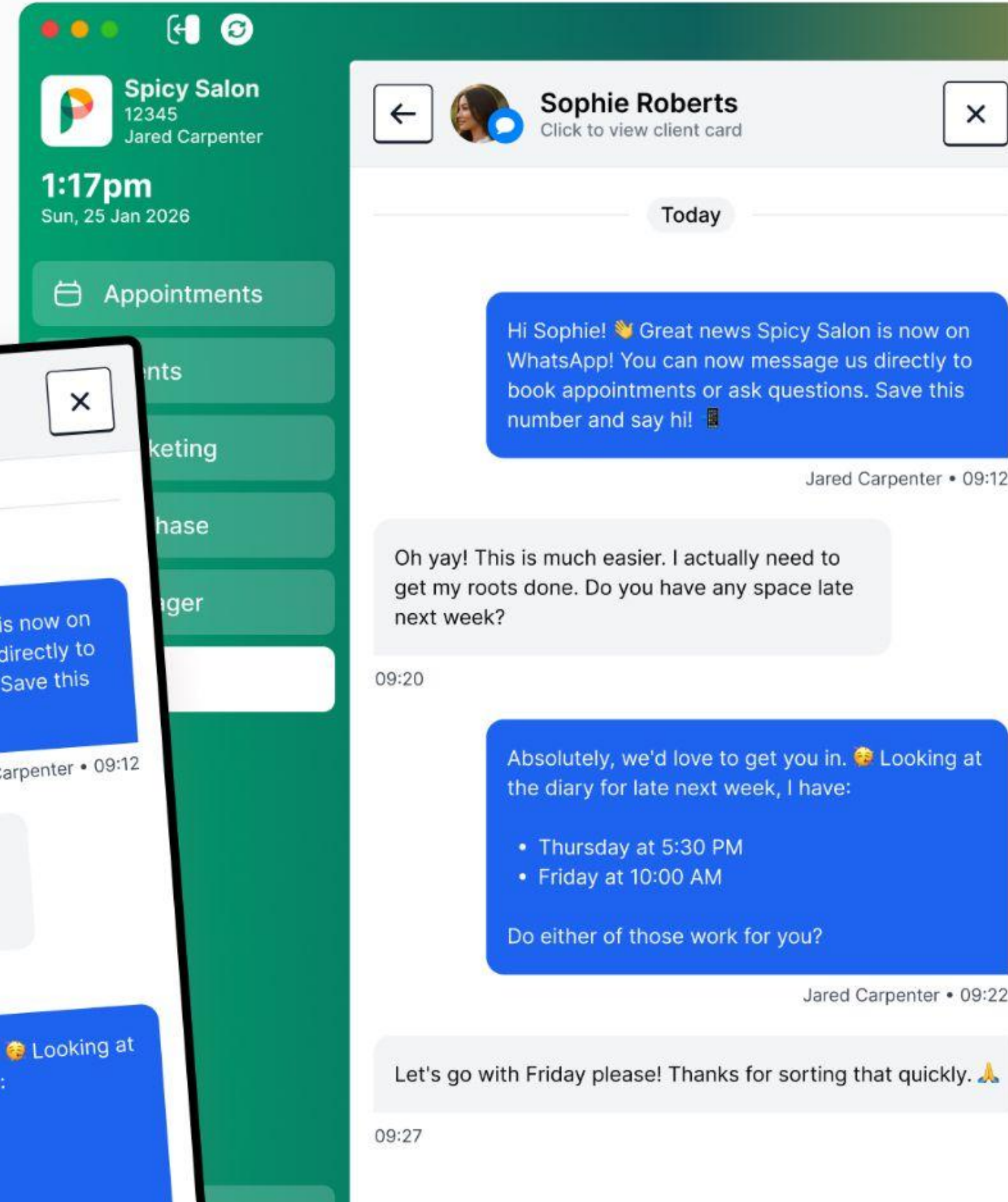
2Way Chat

Available on Desktop
& Phorest Go



Phorest Chat
1 new message

Nothing gets missed with
real-time notifications!



The image shows a desktop view of the Phorest Chat interface on the left and a mobile view on the right. The desktop view displays a chat window for 'Sophie Roberts' with a message from 'Jared Carpenter' about WhatsApp integration and a response from Sophie. The mobile view shows the same chat window with a list of appointment times: Thursday at 5:30 PM and Friday at 10:00 AM. A notification badge for 'Phorest Chat' with '1 new message' is shown in the foreground, pointing to the chat window.

What you need to know

Cost

\$15 per month +GST - Per Location

SMS Number

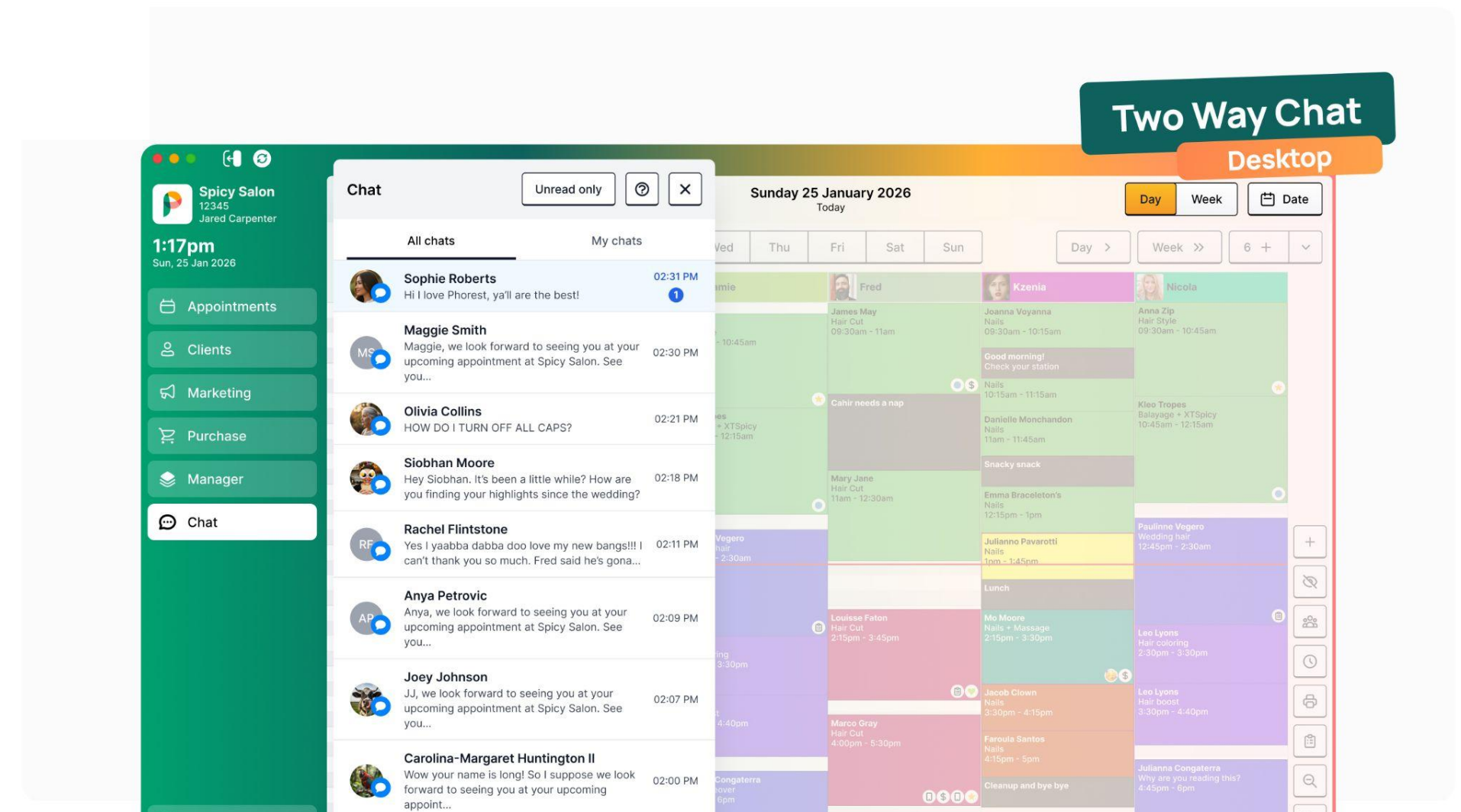
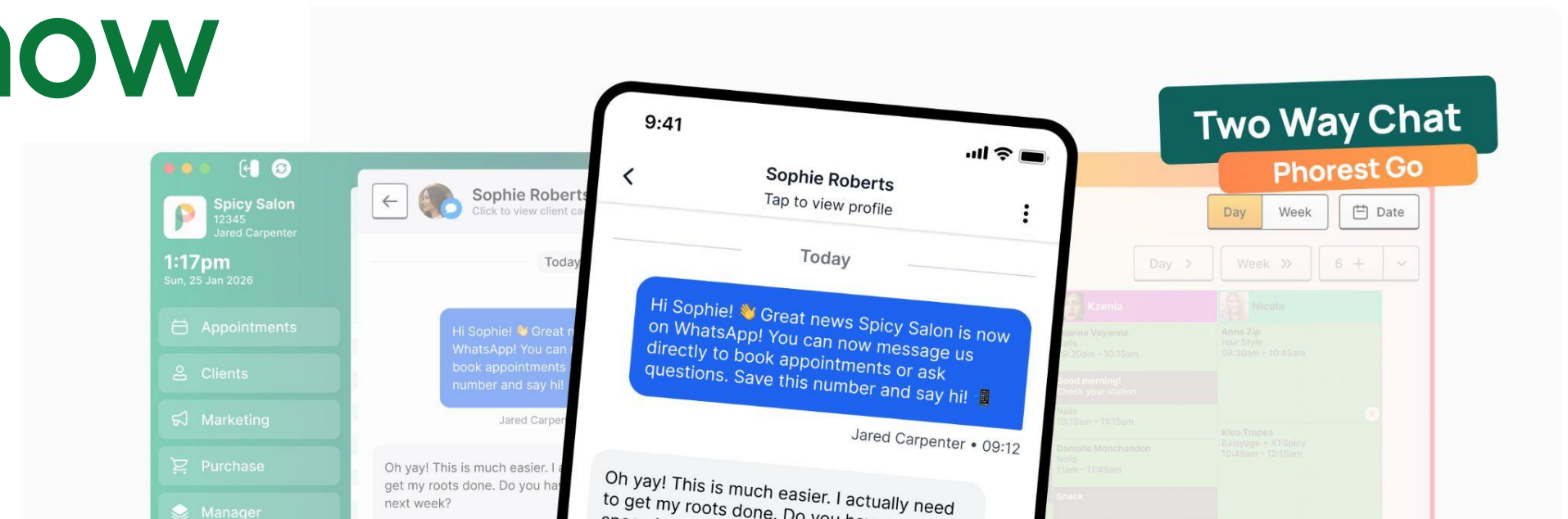
Is generated by our provider,
It will never change, so client can save it in their phone

SMS

Charged at your package rate
(bundles are available)

Access

You can restrict staff members access





Your clients will love this.
They'll be able to contact you
whenever they want...
Day or night.

Introducing Front Desk AI

The central, AI-powered hub for all client communication and scheduling.



The interface is divided into several sections:

- Calendar:** Shows the date "Thursday 24 September 2025" and a weekly view with days from "Today" to "Sun".
- Client List:** A grid of client cards with names and services. Visible clients include Jamie, Fred, Joanna Voya, Anna Zip, James May, Good mornin, Kleo Tropes, Faroula Santos, and Danielle Mon.
- Chat Window:** A central chat interface titled "Chat" with "Powered by PhorestAI". It includes a search bar "Search for a client", a "Show unread" checkbox, and buttons for "AI", "?", and "X".
- Chat History:** A list of chat messages with client avatars and timestamps. Visible messages include:
 - Lawrence Brooks: "Hi there! Is there someone available next..." (2:31 pm)
 - Jillian Makakus: "Sounds great! Thanks Ivy!" (2:22 pm)
- Client Interaction:** A chat bubble from "Becky Ryan" asks: "Hi can I book in for Saturday please?". A response from "Ivy AI" says: "Hey Becky! Ivy here, the AI assistant at Cullens. Does 11:00am on Saturday work for you?". A final response from "Becky Ryan" says: "Perfect! Thanks Ivy".

What you need to know

Cost

\$159 +GST per month - per location

SMS Number

Uses the same 2way chat number

SMS

500 SMS included. Additional SMS
Charged at your package rate
(bundles are available)

Interactions

Fair use policy of 1,000 AI interactions across
cheat sheet and front desk AI

The screenshot displays the Phorest Front Desk AI interface. At the top, a dark green banner reads "Trust & Control". The main interface shows a calendar for "Sunday 25 January 2026" with a grid of appointments. A "Front Desk AI" control panel is overlaid on the right, featuring a "Test Mode" toggle (currently checked) and a "Testers" list with names like Nicola Zaghini, Clare Duggan, and Ben Reinhardt. A blue callout box explains: "What is test mode? This is the perfect, safe way to see the magic of FrontDeskAI in action without activating it for your entire client list. You're in complete control." A handwritten note "Test mode" with an arrow points to the "Test Mode" toggle.

Naming your AI Assistant

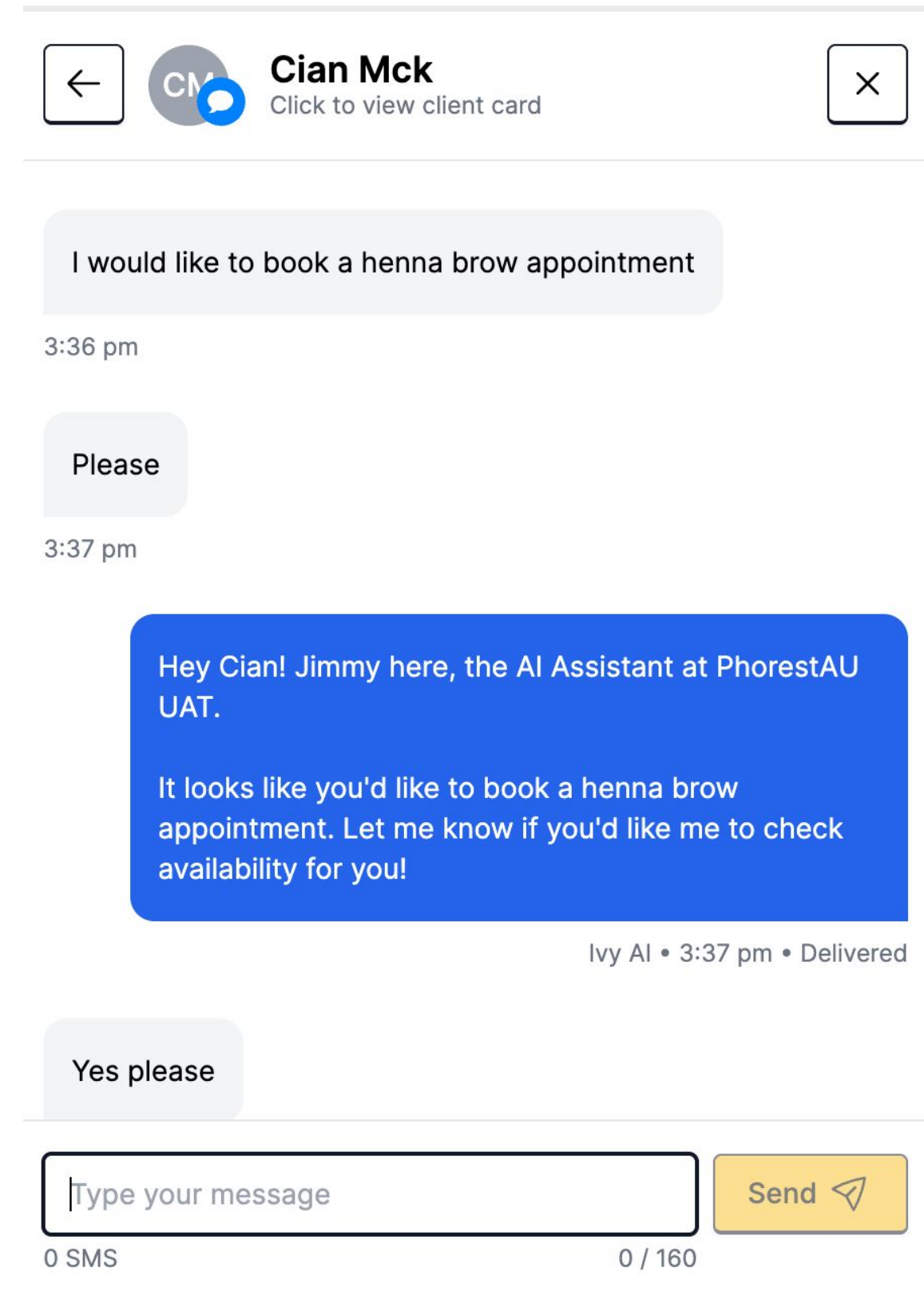
By default your assistants name is Ivy,

Pick something that is personal to your business & works with your brand identity.

The AI will always introduce itself, so the AI name is visible to clients.

Head to MANAGER / STAFF and find Ivy's profile, then simply give them a new first name.

Helpsheet: [How to rename your AI assistant](#)



Custom Responses

Your AI assistant uses your Phorest data to craft its replies, But there will be things that it doesn't know.

You can fill in these missing gaps by creating custom responses to common questions.

Common custom responses

Where do I park?

Is your business accessible to wheelchair users ?

Where in the shopping centre are you ?

Helpsheet: [How to set custom responses](#)

FrontDesk AI ✕

On/Off Custom responses

When a client asks 18/200

Where can i park ?

AI recognizes similar phrasing automatically. Any variation of this question will trigger your custom response.

Your custom response 138/999

There is limited street parking. There is a paid car park on James [Street](#), Turn left at the lights and the car park will be on your right.

AI may slightly adapt your response to fit the conversation.

Cancel Save

Test Mode

Test mode is designed for you and your team to experience the AI assistant before launching it fully.

This is a great way for you to familiarise yourself with how the AI works and build confidence in the tool.

You can also add certain clients to the test mode if they wish to participate.

Helpsheet: [Using Test Mode](#)

FrontDesk AI ✕

On/Off Custom responses

On

Off

Test Mode

i What is test mode?
This is the perfect, safe way to see the magic of FrontDesk AI in action without activating it for your entire client list. All actions are live, meaning they will update your calendar and reports in real-time.

Testers

You can add anyone as a tester! Just make sure they have a client profile that includes their phone number.

Enable your front desk AI

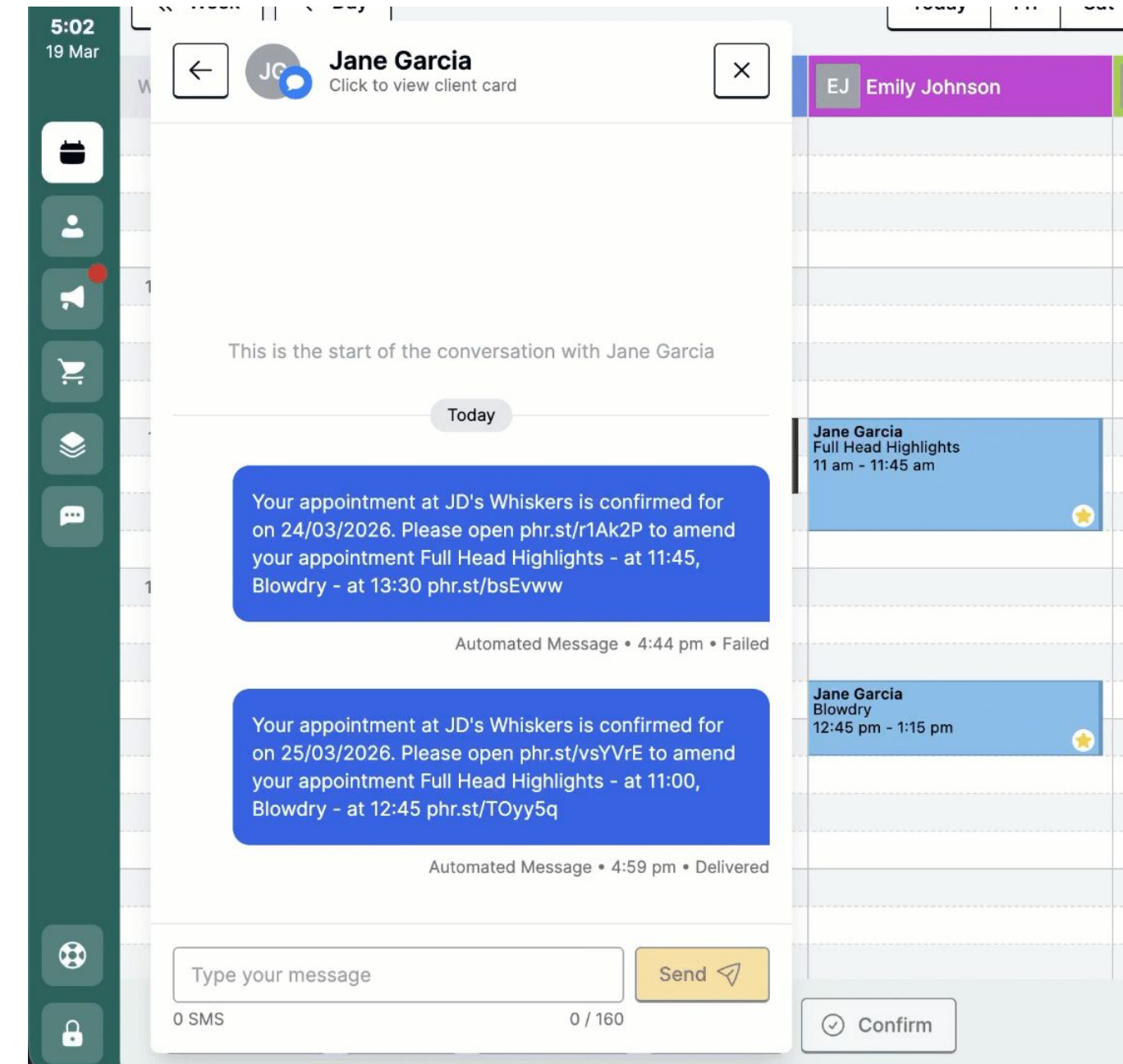
Once your AI assistant is turned on it will respond to any incoming SMS for you.

This will include replies to:

- * Appointment reminders,
- * Marketing sms,
- * Consultation form SMS,
- * No Show SMS

To achieve this, we set all of your SMS to be sent from your 2Way Chat number, rather than any number or name your sms used to send from.

Helpsheet: [How Does It Work](#)



Handoff

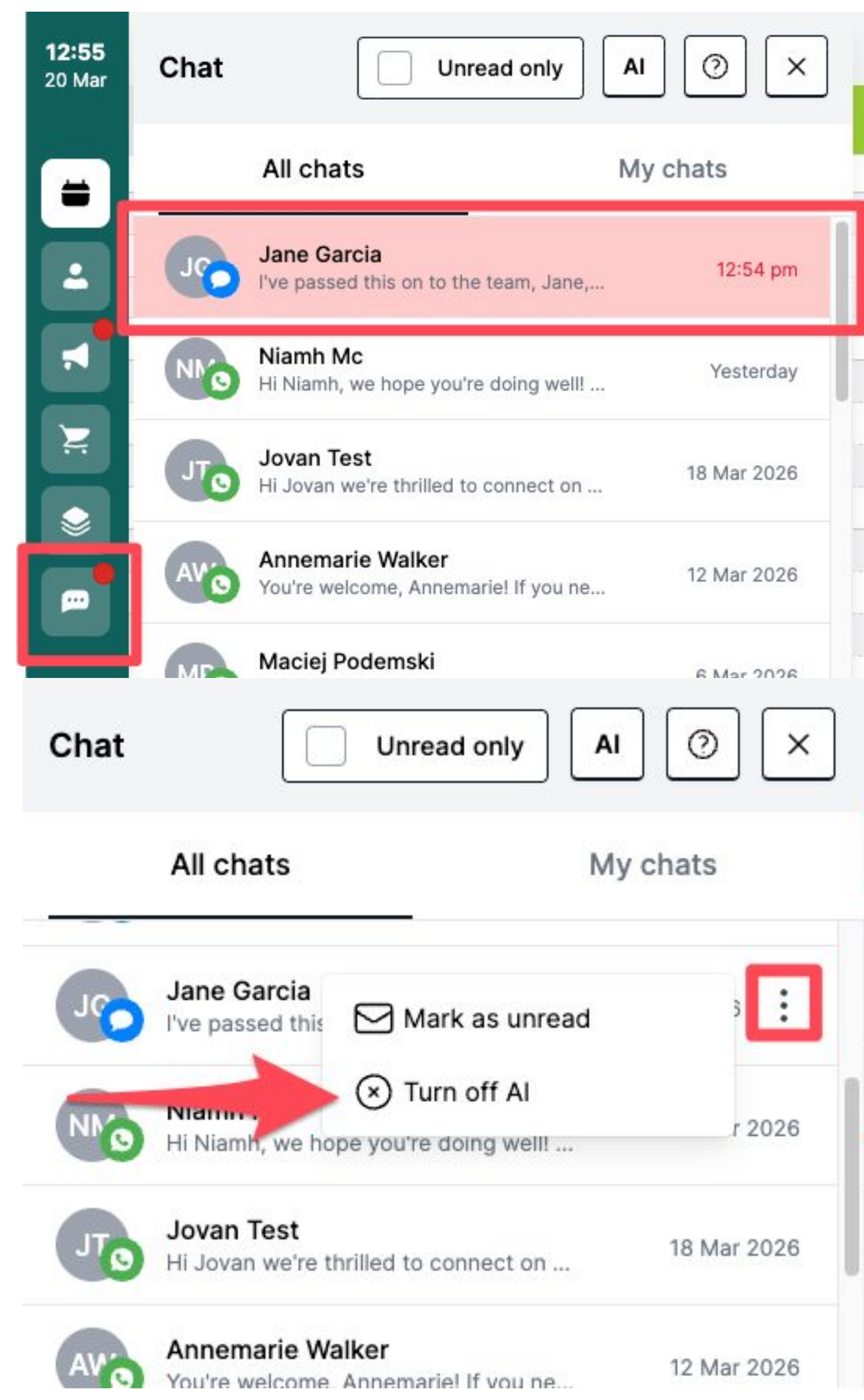
If the AI assistant is unable to assist with the clients enquiry, or if the client asks to speak with a person, the chat will alert you by turning **RED**.

It will pause at AI assistant in that conversation for 24 hours.

Helpsheet: [Handoff to a person](#)

You can also opt clients out of AI conversations if they would prefer the AI not to assist them.

Helpsheet: [Disable AI for an individual](#)



Smart Booking

Smart booking controls the availability in your diary for clients who are booking online or via your Front Desk AI.

It will only offer appointments:

- At the beginning or end of your day
- Before or after existing appointment
- Before or after breaks

This removes the issue of having clients place an appointment in the middle of the day with too much or too little time around it, increasing your utilisation and minimising wasteful gaps

As Front Desk AI uses the online booking system to make / change appointments, we recommend checking / updating your online booking settings.

Helpsheet: [Smart Booking](#)



Marketing

We have added SMS and Email marketing templates to your system to help you inform your clients about the new way they can interact with your business 24/7.

If you are changing the way you are doing things, e.g using your AI assistant to confirm appointment rather than using the link or if the 2way chat number is new, This is a great time to let clients know.

If you send the marketing via SMS and your front desk AI is active, client can start using it straight away

Recommendations:

Send a marketing SMS to clients with future bookings.

Send an marketing email to all clients.

Helpsheet: [How to send an SMS campaign](#)

Subject: Meet "NAME" – Your new 24/7
assista...



Hi Mary,

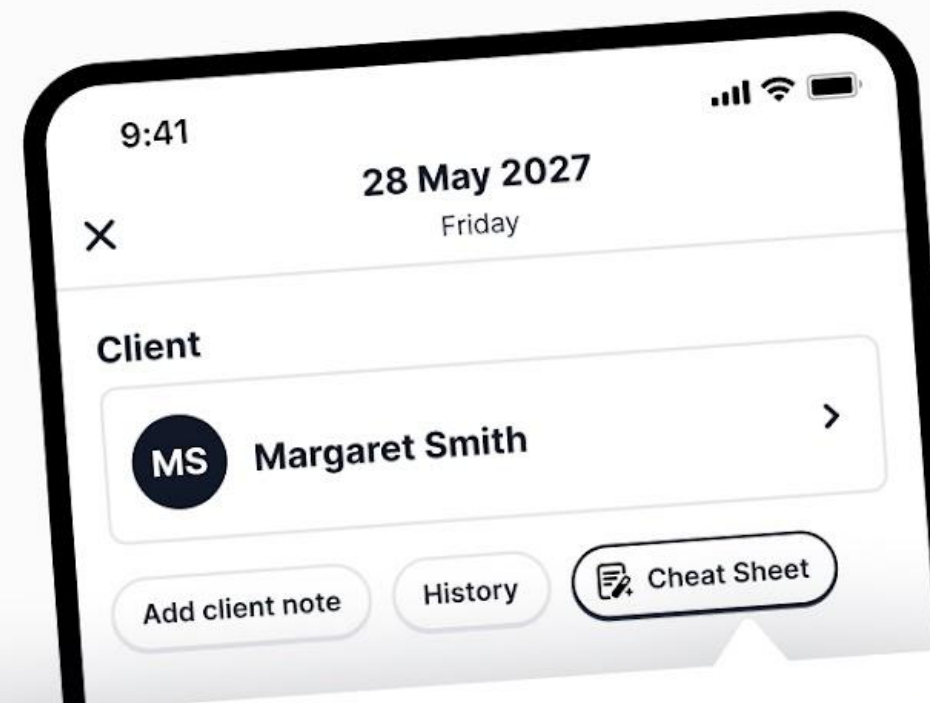
we've introduced something new to
make staying in touch with us even
easier. 💖

You can now **simply text us** for a
quicker, more convenient way to



Introducing

Cheat Sheet AI



Generate an **AI-powered summary** with smart tips.

What you need to know

Cost

Included with front desk AI

Interactions

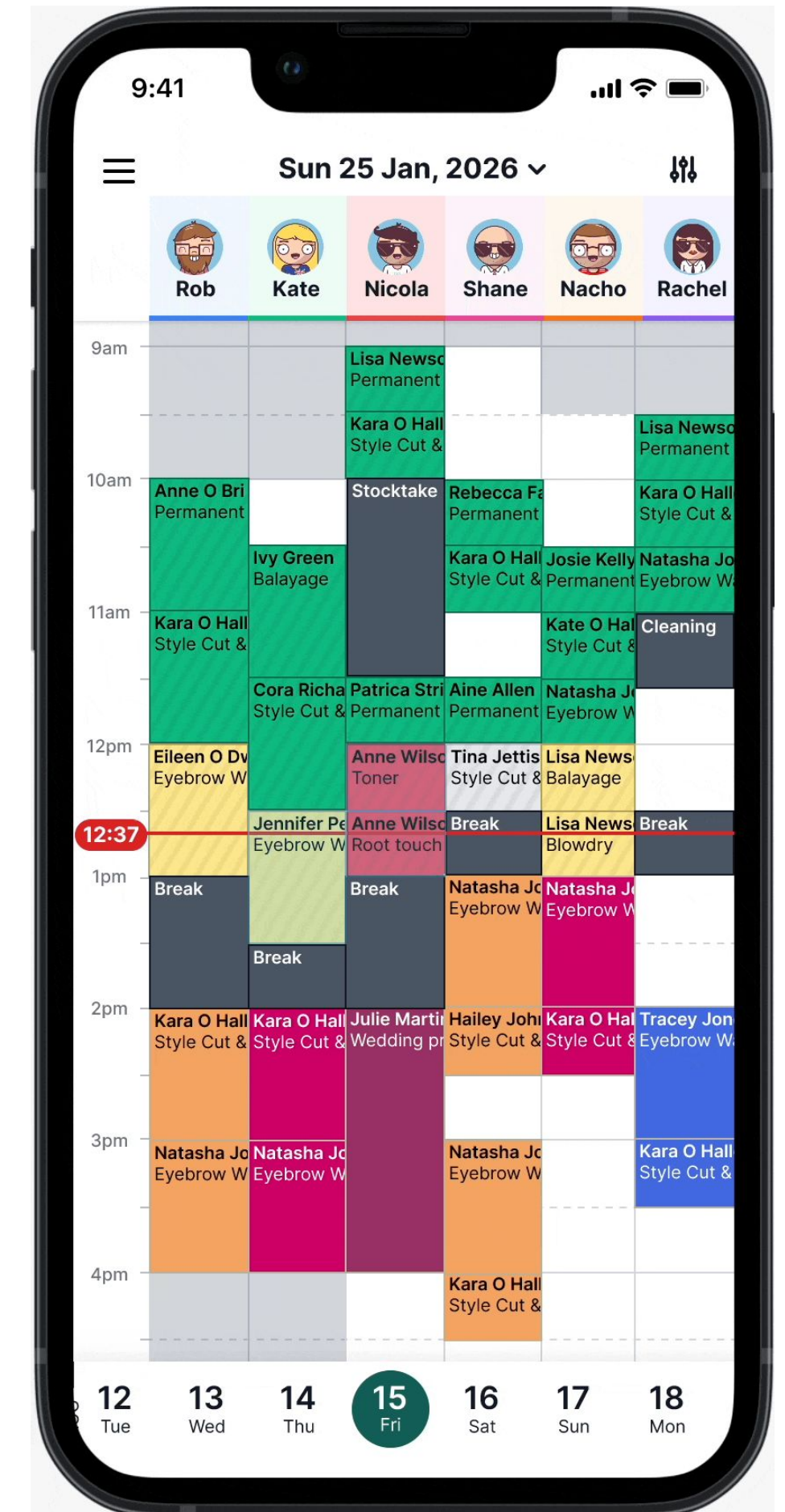
Fair use policy of 1,000 AI interactions across cheat sheet and front desk AI

Access

Is only available on PhorestGo

History

Cheat sheet uses the last 30 events of a client or last 3 years, whichever is greater



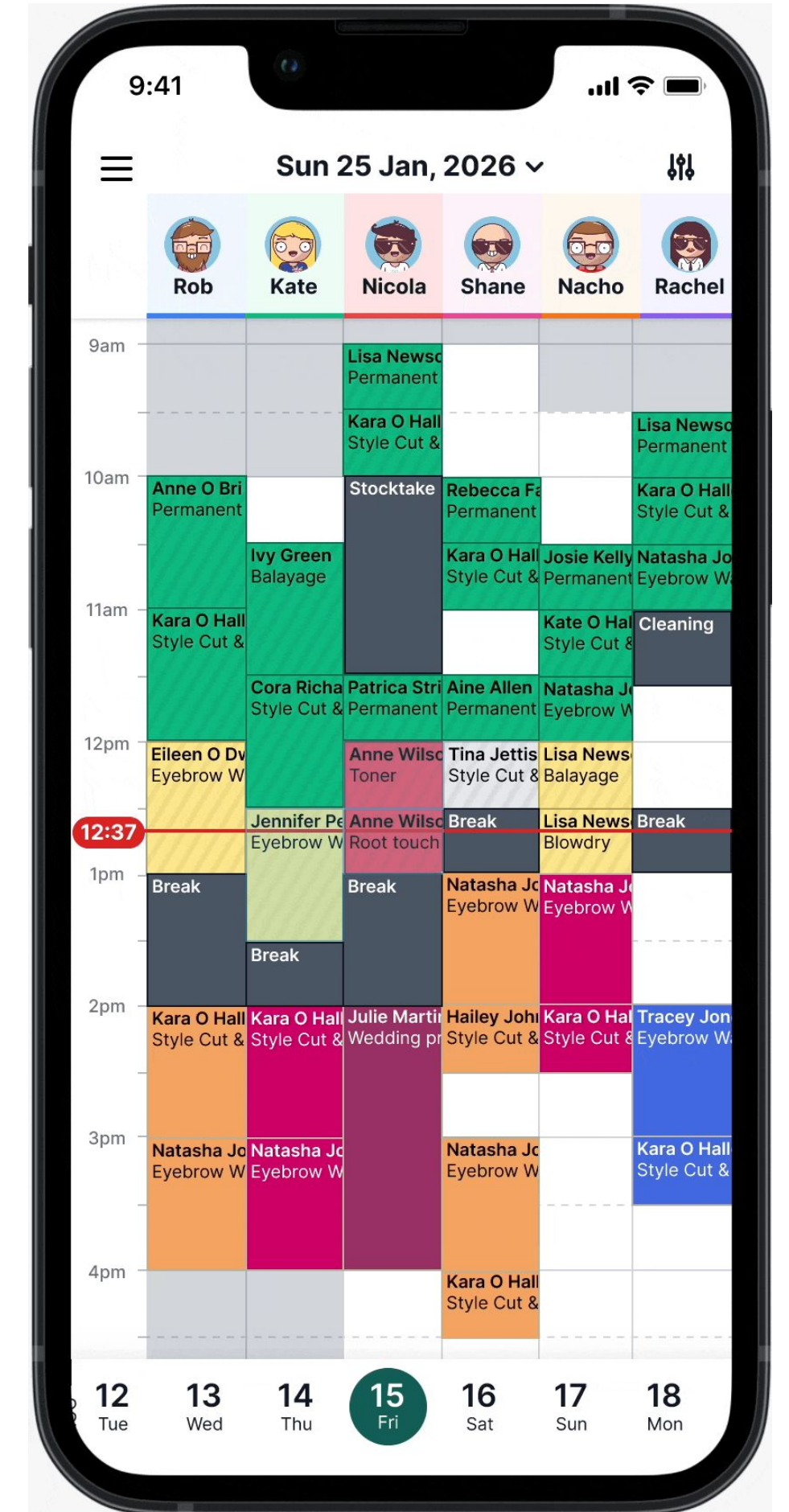
How it works

In PhorestGo,

Click on a client's appointment,
Press 'Cheat Sheet'.

It's that simple.

Helpsheet: [How to generate an AI Cheat Sheet](#)



Help Sheets

[How to generate an AI Cheat Sheet](#)

[How to send an SMS campaign](#)

[Smart Booking](#)

[Front Desk AI](#)

Phorest Academy

[Front Desk AI - Phorest Academy course](#)

Missing Features?

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[Click Here](#)