



QUICK START HANDBOOK

Your First 7 Days to Results.

*A simple walkthrough to get everything set up and working fast.
Use alongside your video tutorial series at members.meetdaisy.co.uk*

YOU'RE IN. LET'S GO.

7 Days. Real Results. No Guesswork.

You've just unlocked one of the most powerful all-in-one platforms for service businesses. dAlsy combines your CRM, automation, bookings, follow-up, and AI into a single system that works for you around the clock.

This handbook maps to 10 tutorial videos waiting for you at members.meetdaisy.co.uk. Follow one day at a time.

80%

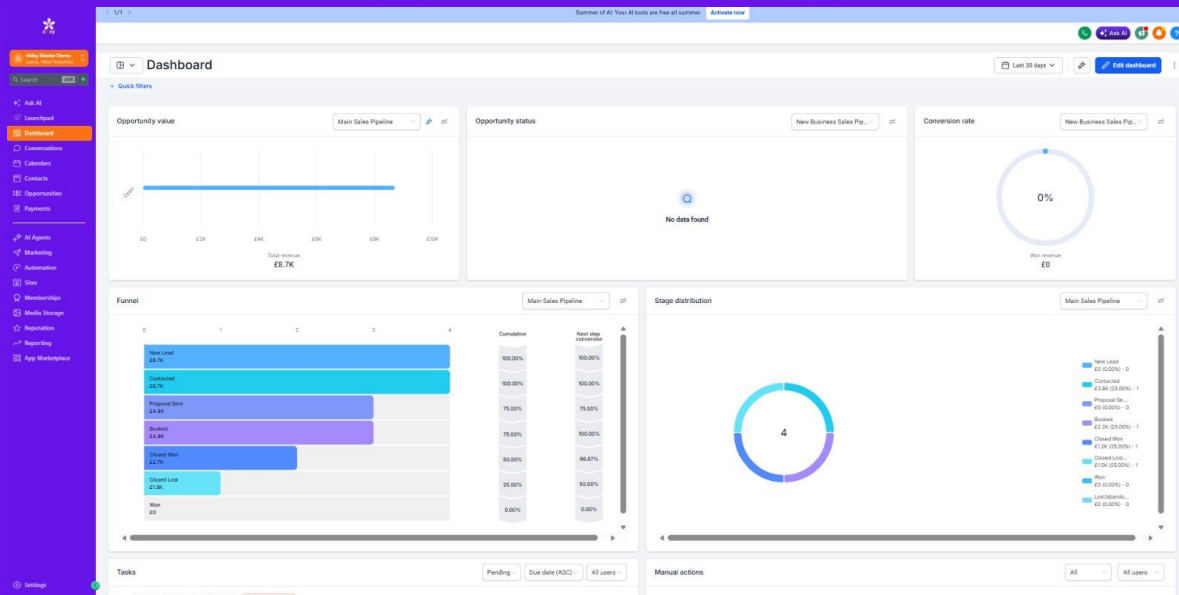
of leads need 5+ follow-ups to convert

4hrs

average time saved per day with automation

3x

more bookings with instant AI response



YOUR 10-VIDEO TUTORIAL SERIES

- 01 Welcome to dAlsy**
Before Day 1 · 3–4 min
- 02 Account Setup**
Day 1 · 7–9 min
- 03 Connecting Your Channels**
Day 2 · 12–14 min
- 04 Pipeline & Contacts**
Day 3 · 8–10 min
- 05 Your First Automation**
Day 4 · 8–10 min
- 06 Missed Call Text Back**
Day 4 · 4–5 min
- 07 Booking Calendar**
Day 3–4 · 7–9 min
- 08 Send Your First Broadcast**
Day 5 · 8–10 min
- 09 Dashboard & Optimising**
Day 6 · 6–8 min
- 10 Day 7 — What Comes Next**
Day 7 · 5–7 min



Get In & Get Oriented

Make dAly look and feel like your business.

45–60 minutes

Before you can automate anything, the foundation must be set correctly. Today you configure your business profile, upload your logo, set your time zone, and invite your team. Get this right once and it flows through every message, every email, every page dAly ever sends on your behalf.

01

Settings → Business Profile

Click the gear icon (bottom-left) → Business Profile. Fill in: Business Name, Business Phone, Business Email, Address, City, Post Code, Country, Time Zone. Your time zone controls when automations fire — don't skip this.

03

Settings → Team Management

Add Employee → enter name, email, and choose role: Admin (full access including billing — use sparingly), User (right level for most team members), Read Only (for anyone who just needs to check the pipeline). They receive an invite email immediately.

02

Logo & Branding

Still in Settings → scroll to Logo → upload your PNG (transparent background works best). Then: Settings → Email → Branding section → set your primary brand colour (hex code). Set it once — it applies to every email template you build.

04

Explore the Left Navigation

Spend 10 minutes clicking through — don't change anything, just orient yourself: Conversations (unified inbox) · Contacts (CRM) · Pipelines (visual sales board) · Marketing (campaigns) · Automations (the magic) · Calendars · Sites · Reporting.

DAY 1 QUICK WIN

Upload your logo and set your brand colours now. From this point every automated email, SMS, and booking page dAly sends on your behalf will look on-brand — without any extra effort.

BY END OF TODAY YOU WILL HAVE:

Business profile configured

Logo & brand colours uploaded

Team members invited

Platform navigation explored



Connect Everything

One inbox. Every conversation. Zero missed leads.

60–90 minutes

Today you connect every channel into one place. Note: WhatsApp requires a Meta Business account — have this ready before you start. The payoff: every lead who calls, emails, WhatsApps, or DMs you on Facebook or Instagram lands in the same inbox automatically.

01

Settings → Phone Numbers → Add Number

Choose UK, pick a local area code (local numbers build more trust). This number handles inbound/outbound calls, SMS, and voicemail drops — all logged automatically in the CRM. Then: Phone Numbers → Call Settings → set call forwarding to your mobile.

03

Calendars → Calendar Settings → Integrations

Connect Google Calendar or Outlook — one-click OAuth. dAly reads your existing calendar (no double bookings) and writes new appointments directly into it. Then set availability: working days, hours, and buffer time between appointments.

02

Settings → Email Service → SMTP & Mailgun

Two options: dAly's built-in service (quick start) OR your own domain email (strongly recommended — emails from your domain land in inboxes, not spam). Gmail: one-click OAuth. Outlook/custom domain: enter SMTP host, port, and login. Then set your Reply-To address.

04

Settings → Integrations → WhatsApp [NEW] + Facebook

WhatsApp: Connect → Meta Business account authorisation → verify number. Facebook: Integrations → Facebook → OAuth → select your Business Page (also links Instagram). All messages from every channel now appear in Conversations. Send yourself a test message on each.

WHY THIS MATTERS

Most businesses lose leads because messages are scattered across WhatsApp, Facebook, email, and phone. With everything in one Conversations inbox you can respond instantly from one place — and automate replies for when you're busy. This alone saves most owners an hour a day.

BY END OF TODAY YOU WILL HAVE:

- Phone number live & forwarding set
 Email connected & Reply-To set
 Calendar synced
 WhatsApp connected
 Facebook & Instagram DMs flowing in



Build Your First Pipeline

See exactly where every lead is, at a glance.

45–60 minutes

You may already see a pipeline in your account — that's your dAIsy onboarding tracker (New Trial, Trial Active, etc.). Leave it as-is. Today you're building a separate pipeline for your own business. This is your visual sales board.

01

Pipelines → Add Pipeline

Name it (e.g. 'Main Sales Pipeline'). Add stages: New Lead → Contacted → Proposal Sent → Booked → Won → Lost. Drag to reorder. Five or six stages is right — you can add more later. Save. The goal: one glance tells you the health of your entire pipeline.

03

Settings → Custom Fields → Add 'Lead Source'

Add Field → Name: 'Lead Source' → Type: Dropdown → Options: Facebook, Google, Referral, Website, Other. Fill this in for every new contact from today. In 3 months, this data tells you exactly where your best clients come from so you can double down on what works.

02

Contacts → Import → Upload CSV

Your CSV needs: First Name, Last Name, Email, Phone. Map columns to dAIsy fields on the mapping screen. Use the Tags field to segment: tag past clients as 'past-client', warm leads as 'warm-lead'. These tags are essential for your Day 5 campaigns.

04

Add Your Active Leads to the Pipeline

For any leads you're currently working (in your head, in WhatsApp, in a notebook): Contacts → click contact → Add to Pipeline → choose stage. Proposal sent? Put them in 'Proposal Sent'. Booked? 'Booked'. Spend 5 minutes here — your pipeline goes from empty to alive.

PIPELINE POWER TIP + VIDEO 07 — BOOKING CALENDAR (Day 3–4 parallel task)

Also watch Video 07 alongside this day: Calendars → New Calendar → Personal. Set availability, buffer time, reminders (email 24hr before + SMS 1hr before — reduces no-shows by up to 60%), then copy your booking link. Put it everywhere.

BY END OF TODAY YOU WILL HAVE:

- Pipeline stages created
 Contacts imported & tagged
 Lead Source custom field added
 Active leads in pipeline
 Booking calendar live



Automate Your Follow-Up

The step that changes everything.

60–90 minutes

Day 4 has two videos. Video 05 walks you through activating your New Lead Welcome Sequence — personalising the messages and switching it on. Video 06 (Missed Call Text Back) is pre-configured in your account — you customise and test.

01

Video 05 — Automations → New Lead Workflow

Check Automations for a pre-built 'New Lead Welcome Sequence'. If present: open it, read each message, make them sound like you, activate it. If not pre-built: Trigger: Contact Created → SMS (instant) → Email with booking link (5 min delay) → Follow-up if not booked (24hr).

03

Calendars → Notifications/Reminders Tab

Turn on all four: ✓ Email confirmation on booking ✓ SMS confirmation on booking ✓ Email reminder 24 hours before ✓ SMS reminder 1 hour before. These reminders reduce no-shows by up to 60%. Takes 2 minutes to set up. The messages are already written — just toggle them on.

02

Video 06 — Settings → Missed Call Text Back

The toggle should already be ON in your account. Your job: make the message sound like you. Recommended: 'Hey, it's [Your Name] from [Business] — sorry I missed your call! Reply here or book a time: [your booking link]'. Save. Then test: call your dAly number from another phone → let it ring to voicemail → watch the text arrive within 30 seconds.

04

Test Your Automation End to End

Create a test contact → trigger the workflow → confirm each step fires: instant SMS, email at 5 mins. Call your dAly number from a second phone, let it go to voicemail, confirm the Missed Call Text Back arrives within 30 seconds. Check everything looks right before it fires on a real lead.

THE GAME CHANGER

Businesses that respond to a new lead within 5 minutes are 9× more likely to convert. With dAly, your response is now instant — even at 2am on a Sunday. Once this automation is live, it runs forever without you touching it.

BY END OF TODAY YOU WILL HAVE:

New Lead automation live & tested

Missed Call Text Back customised & tested

Appointment reminders active



Launch Your First Campaign

Turn your existing contacts into booked appointments.

45–75 minutes

You've got contacts in your CRM. Every one of them already knows you or has expressed interest. Today you reach out — and for most people this results in same-day bookings. Start with SMS. Research shows 10am–12pm and 5pm–7pm get the highest response rates.

01

Marketing → SMS Campaigns → Create Campaign

Name it 'Reactivation — [Month]'. Filter recipients by tag: start with 'warm-lead' or 'past-client'. Insert {{contact.first_name}} merge field. Keep under 160 characters and include your booking link. SMS has a 98% open rate — always lead with SMS, not email. Hit Send.

03

Automations → New Workflow → Cold Lead Nurture

Trigger: Tag Added = 'cold-lead'. Sequence: Email Day 1 (intro) → Wait 3 days → Email Day 4 (value/tip) → Wait 7 days → Email Day 11 (case study/testimonial) → Wait 7 days → SMS Day 18 (soft offer). Tag someone 'cold-lead' and this entire sequence starts automatically.

02

Marketing → Email Campaigns → Create → Broadcast

Choose a simple single-column template. Subject line: '{{contact.first_name}}, I wanted to reach out personally' — this subject line gets opened because it feels like a real email from a real person. Short body (2 paragraphs). One CTA button: 'Book a Free Call' linked to your booking URL.

04

Monitor Conversations — Respond Personally

Go to Conversations and watch replies come in — especially from the SMS broadcast. Reply personally to anyone who responds. dAly has done the heavy lifting of re-engagement. Now your job is to close the conversation. dAly brought them back — you pick up from here.

SMS TEMPLATE THAT WORKS

'Hi {{contact.first_name}} — it's [Your Name] from [Business]. We've got some availability coming up and I wanted to reach out personally. Would a quick call be useful? Book here: [link]. No pressure at all.' — 147 characters. Personal. Low-barrier. Expect replies within minutes.

BY END OF TODAY YOU WILL HAVE:

SMS broadcast sent

Email broadcast sent

Drip sequence built

Replies monitored & actioned



Check Your Dashboard

Let the data show you what's working.

30–45 minutes

You've been live for five days. Automations have fired, campaigns have gone out, your calendar has been open. Today you check three numbers, action your stuck leads, review your automation log, and make one improvement. That's it. Small changes compound.

01

Marketing → Email Campaigns → click your campaign

Check: Delivered (aim 90%+), Open rate (aim 30%+), Click rate (aim 3%+). Low opens = subject line problem. Low clicks = body copy or CTA problem. Then: Marketing → SMS Campaigns → check Sent, Delivered, Replied. Good SMS reply rate for a warm list: 15–25%.

03

Automations → New Lead Sequence → Execution History

Check the Execution History tab. Look for Failed entries. Most common failure: invalid or missing phone number — the SMS couldn't be sent. Click into the failed execution, find the contact, fix their data. These are recoverable leads. Don't leave them.

02

Pipelines → filter by 'last activity'

Surface leads with no activity in 3+ days. These are your stuck leads — they need a nudge. Click into a stale lead's contact record. Look at the conversation history. Pick your top 3 stuck leads and send a personal message right now. Not an automation — from you, personally. That human touch converts.

04

Make One Improvement

Low open rate? Change the email subject line. Low SMS clicks? Try a more direct call to action. Too many stuck leads? Build an automation to nudge them at 3 days. Open the automation, edit the subject line or message copy, republish. Pick one thing — measure the difference tomorrow.

BENCHMARKS TO AIM FOR

SMS open rate: 90–98% · Email open rate: 25–40% · Automation response rate: 15–25% · No-show rate with reminders: below 15% · Appointments booked: every one that happened without you lifting a finger is your ROI on dAly.

BY END OF TODAY YOU WILL HAVE:

- Campaign stats reviewed Stuck leads actioned personally Automation execution log checked One improvement made & republished



Decision Day – See What You've Built

Your system is live. Your leads are followed up. Your calendar is filling.

A moment to reflect — and decide.

7 days to a live automated system

24/7 your follow-up now runs without you

∞ leads that will never slip through again

What to Unlock Next inside dAIsy:

Landing Pages & Funnels

Build lead capture pages and full sales funnels inside dAIsy — replaces ClickFunnels, Leadpages, or whatever you're using now. No extra subscriptions.

AI Conversation Bot

AI handles initial conversations, qualifies leads, and books appointments automatically — even while you sleep. The future of your front desk.

Review & Reputation Automation

Automate Google and Facebook review requests after every job. One of the fastest ways to dominate local search and win new business.

Advanced Revenue Reporting

Full source attribution — which campaigns and which channels are generating real bookings and real money. Data-driven decisions from day one.

KEEP THE MOMENTUM GOING

Book your free 30-minute consultation — we'll look at what you've built, answer any questions, and show you what a fully built-out dAIsy system looks like for a business like yours.
meetdaisy.co.uk/book



Your 7-Day Quick Win Checklist

Every tick is a step closer to a fully automated business. Tutorial videos at members.meetdaisy.co.uk

Day 1 — Video 02

- Business profile completed (Settings → Business Profile)
- Logo and brand colours uploaded
- Time zone and address set
- Team members invited (Settings → Team Management)
- Left navigation explored

Day 4 — Videos 05 & 06

- New Lead automation activated & tested
- Missed Call Text Back message personalised
- Missed Call Text Back tested — text received
- Appointment reminders activated (Calendars → Notifications)

Day 2 — Video 03

- Phone number acquired (Settings → Phone Numbers)
- Email (SMTP) connected & Reply-To set
- Google/Outlook calendar synced
- WhatsApp connected (Settings → Integrations)
- Facebook & Instagram DMs connected
- Unified inbox tested — all channels flowing

Day 5 — Video 08

- SMS broadcast sent to warm-lead / past-client tags
- Email broadcast sent to broader list
- Drip sequence built for cold-lead tag
- Replies monitored and actioned personally

Day 3 — Videos 04 & 07

- dAisy onboarding pipeline noted (leave as-is)
- Own sales pipeline created (Pipelines → Add Pipeline)
- Existing contacts imported via CSV
- Contacts tagged (past-client, warm-lead)
- Lead Source custom field added
- Booking calendar set up with reminders (Video 07)

Day 6 — Video 09

- Email open & click rates reviewed
- SMS campaign stats reviewed
- Top 3 stuck pipeline leads nudged personally
- Automation execution log checked — failed entries fixed
- One improvement made and republished

Day 7 Video 10

- Dashboard reviewed — automations run, appointments booked, leads contacted
- Next features identified (funnels, AI bot, reviews, advanced reporting)
- Free 30-min consultation booked



Want Us To Set This Up For You?

Skip the setup. Our team will build your entire automation system — pipeline, follow-up, campaigns, and bookings — in one focused session.

[Book A Free 30-Minute Consultation](#)

meetdaisy.co.uk/book · Or click the button in your member area

✓ No obligation

✓ Done-with-you setup

✓ Your questions answered live