consultz

EXPERT SETUP GUIDE

Set up your Consultz Expert account

Follow these 13 steps on your phone to create your account and get your profile live. It takes about 10 minutes.

Before you start

- Download the Consultz app from the App Store or Google Play.
- Use the **same email address you applied with**.
- Have your referral code ready:

YOUR REFERRAL CODE

`6866f9ad`

PART 1

Create your account

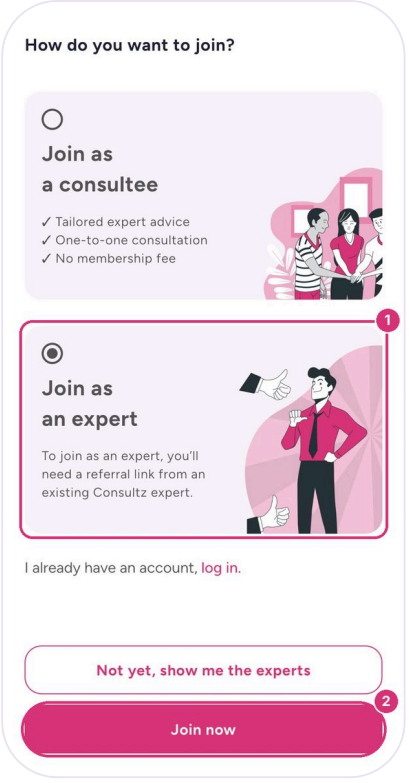
STEP 1 OF 13

Choose “Join as an expert”

Open the Consultz app. The first screen asks how you want to join.

1. Select **Join as an expert**.
2. Tap **Join now**.

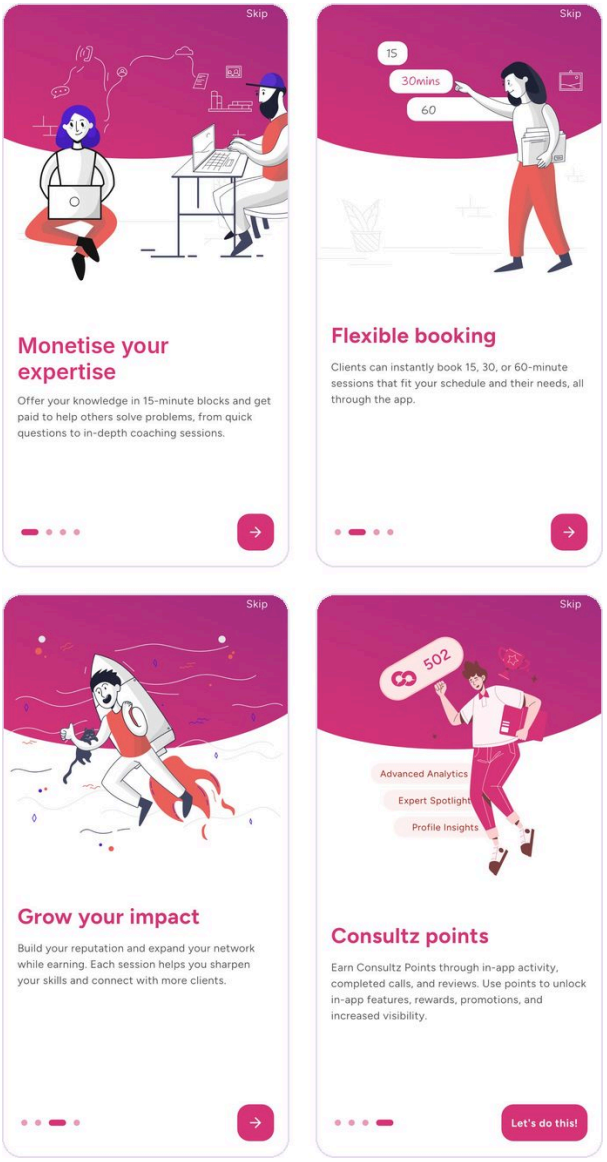
Tip Don’t tap “Not yet, show me the experts”. That’s for clients browsing the app.



STEP 2 OF 13

Swipe through the intro

Four quick screens explain how Consultz works. Tap the → arrow on each one, then **Let's do this!** on the last. You can also tap **Skip** at the top right.

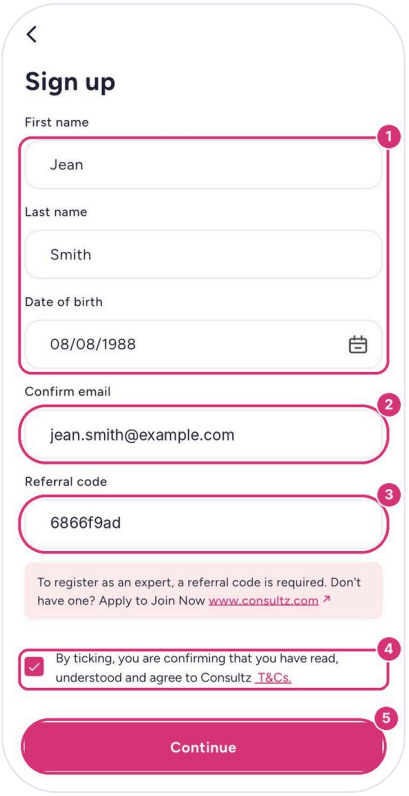


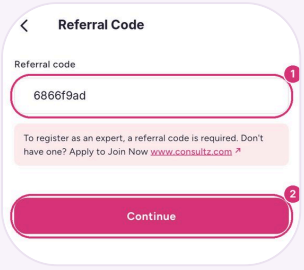
STEP 3 OF 13

Create your account

Fill in the sign-up form.

1. Enter your first name, last name and date of birth.
2. Enter your email. **Use the same email address you applied with**, so your account links to your approved application.
3. Enter your referral code: **`6866f9ad`**.
4. Tick the box to agree to the Consultz T&Cs.
5. Tap **Continue**.





Signing up with Google or Apple?

Tap **Continue with Google** or **Continue with Apple** under the form. The app then asks for your referral code.

1. Enter your referral code: **`6866f9ad`**.
2. Tap **Continue**.

Using Apple? If Apple asks, choose **Share My Email**, not “Hide My Email”. This keeps your account linked to your approved application.

PART 2

Build your profile

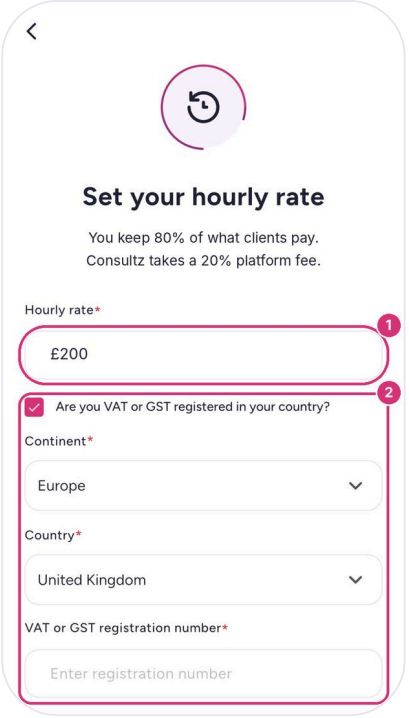
STEP 4 OF 13

Set your hourly rate

Set the price clients pay for an hour with you. You keep 80% of every booking.

1. Enter your hourly rate in pounds (£).
2. If you're VAT or GST registered, tick the box and add your continent, country and registration number. If you're not, leave it unticked.

Tip Your 15- and 30-minute session prices are worked out from this rate. At £200 an hour, a 15-minute session costs the client £50.



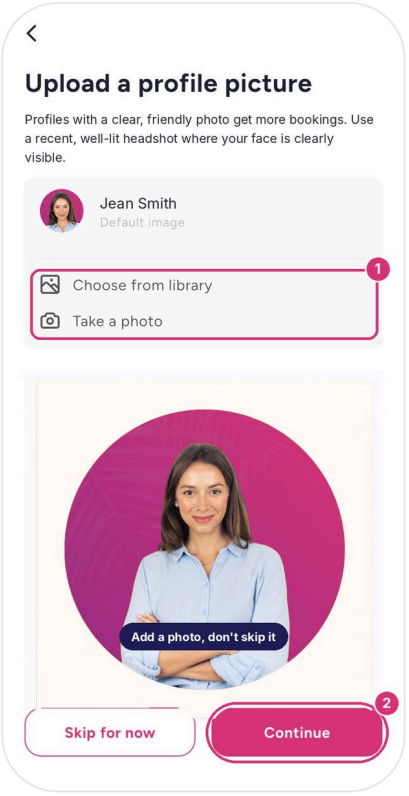
STEP 5 OF 13

Add your profile photo

Clients see your photo before they book, so this step matters.

1. Tap **Choose from library** or **Take a photo**.
2. Tap **Continue**.

Tip Use a recent, well-lit headshot where your face is clearly visible. Profiles with a photo get more bookings, so don't skip it.

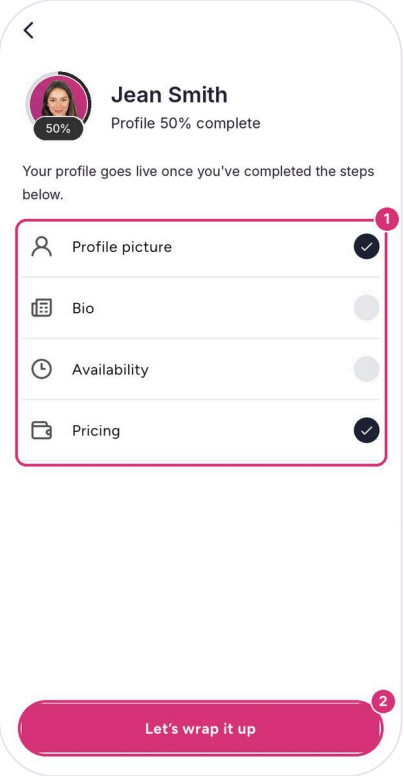


STEP 6 OF 13

See what's left to do

This checklist shows what you still need to do before your profile goes live.

1. Profile picture and Pricing are already ticked. Bio and Availability come next.
2. Tap **Let's wrap it up**.

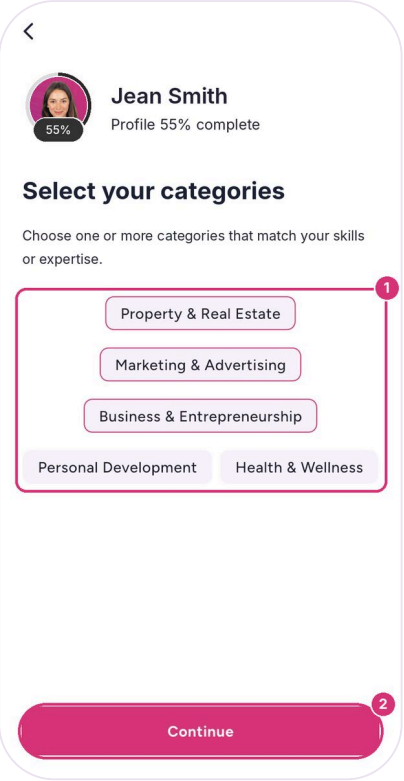


STEP 7 OF 13

Choose your categories

Categories help clients find you.

1. Pick one or more categories that match your expertise.
2. Tap **Continue**.

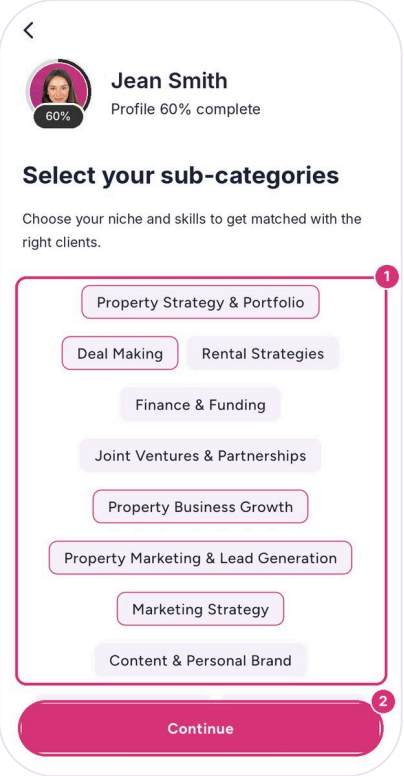


STEP 8 OF 13

Choose your sub-categories

Now get more specific, so you're matched with the right clients.

1. Pick the niches and skills you specialise in. Scroll down to see them all.
2. Tap **Continue**.

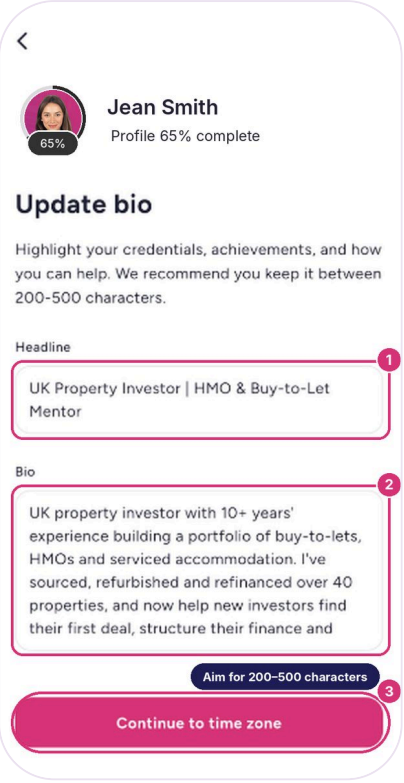


STEP 9 OF 13

Write your bio

Your headline and bio are the first things clients read on your profile.

1. Add a short headline, for example "UK Property Investor | HMO & Buy-to-Let Mentor".
2. Write your bio in 200–500 characters: your credentials, achievements and how you help.
3. Tap **Continue to time zone**.



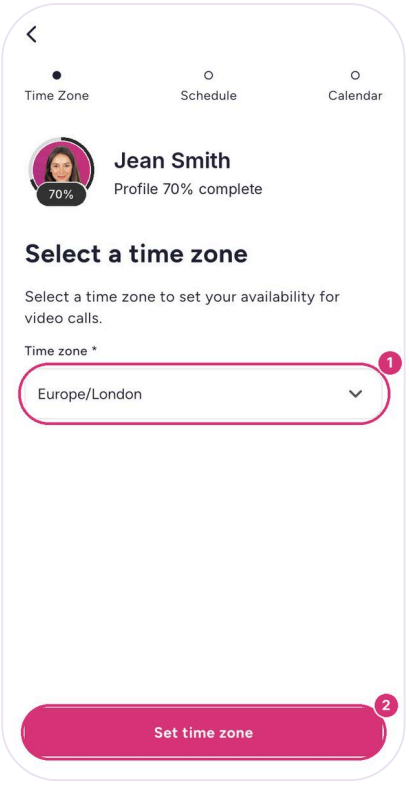
Tip Lead with your results. Numbers stand out, for example "refinanced over 40 properties".

STEP 10 OF 13

Set your time zone

Your time zone makes sure clients book you at the right time.

1. Choose your time zone from the list.
2. Tap **Set time zone**.

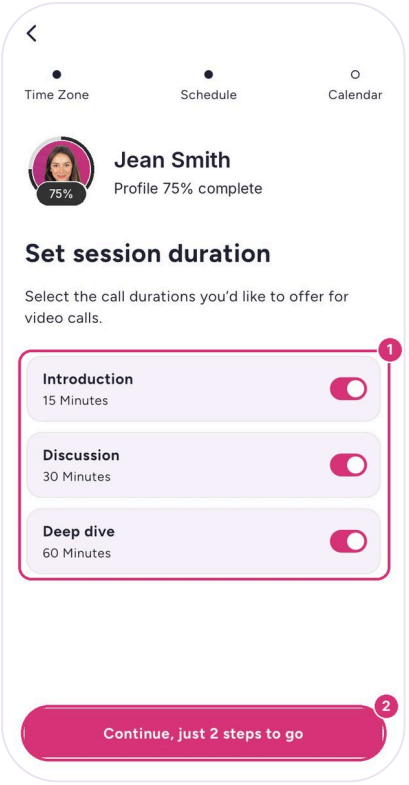


STEP 11 OF 13

Choose your session lengths

Choose which session lengths clients can book.

1. Switch on the lengths you want to offer: **Introduction** (15 minutes), **Discussion** (30 minutes) and **Deep dive** (60 minutes).
2. Tap **Continue**.



Tip Keep all three on to give clients more ways to book you. The 15-minute Introduction is an easy first step for new clients.

Example at £200 an hour

SESSION	LENGTH	CLIENT PAYS	YOU KEEP (80%)
Introduction	15 min	£50	**£40**

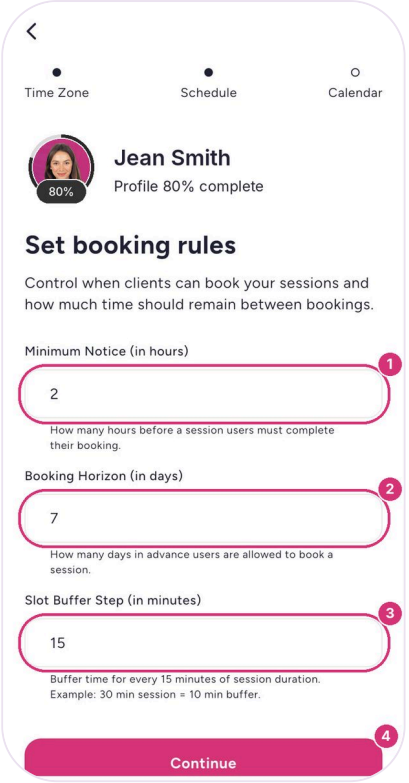
SESSION	LENGTH	CLIENT PAYS	YOU KEEP (80%)
Discussion	30 min	£100	**£80**
Deep dive	60 min	£200	**£160**

STEP 12 OF 13

Set your booking rules

Control when clients can book you.

1. **Minimum notice:** how many hours' warning you need before a session, for example 2.
2. **Booking horizon:** how many days ahead clients can book, for example 7.
3. **Slot buffer step:** the break you get between sessions.
4. Tap **Continue**.

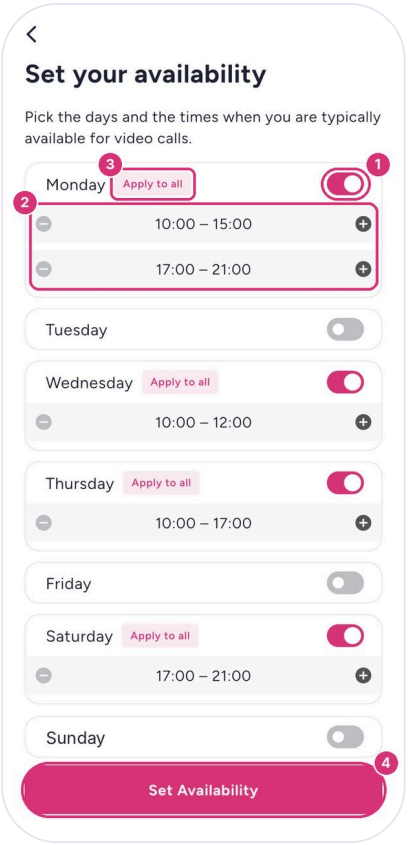


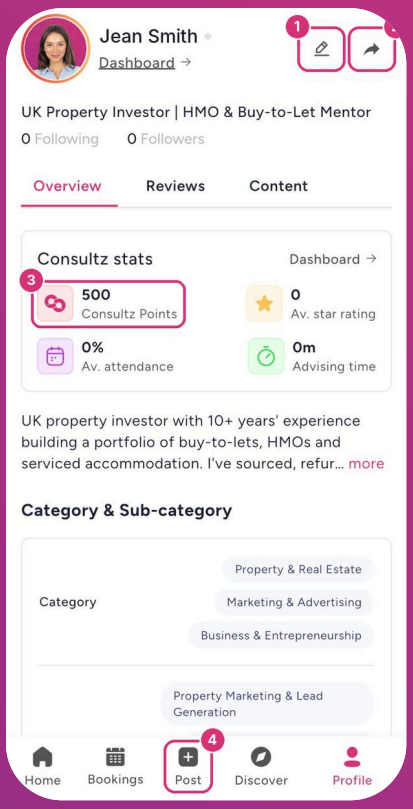
STEP 13 OF 13

Set your availability

The last step. Tell clients when they can book you.

1. Switch on each day you're available.
2. Tap a time to change it. Use **+** to add another time slot and **–** to remove one.
3. Tap **Apply to all** to copy that day's hours to every other day.
4. Tap **Set availability**. Your profile is now 100% complete.





You're live!

When you see your profile page, your profile is 100% complete and ready for clients. From here you can:

1. **Edit** your profile any time.
2. **Share** your profile link with your network.
3. Earn more **Consultz Points** through calls, reviews and activity to boost your visibility.
4. **Post** content so clients can find you.

Next up: make your profile stand out by adding your qualifications. We'll show you how in our next email.

Stuck on a step?

Email the Consultz team and we'll help you get set up.

info@consultz.com

Screens shown use example details. The app may look slightly different as we keep improving it.