Mealie Pro

Step by Step Training

Pehle setup, phir clients, phir leads aur automation — apna poora business ek jagah

Is training me kya seekhenge

A

Setup — client se pehle

Step 1–7: login, business/UPI, time block, membership, courses, templates

B

Clients

Step 8–19: add, profile, medical, diet, meal plan, assign, wellness

C

Leads & Automation

Step 20–33: lead source, landing page, automation, convert, invoice

D

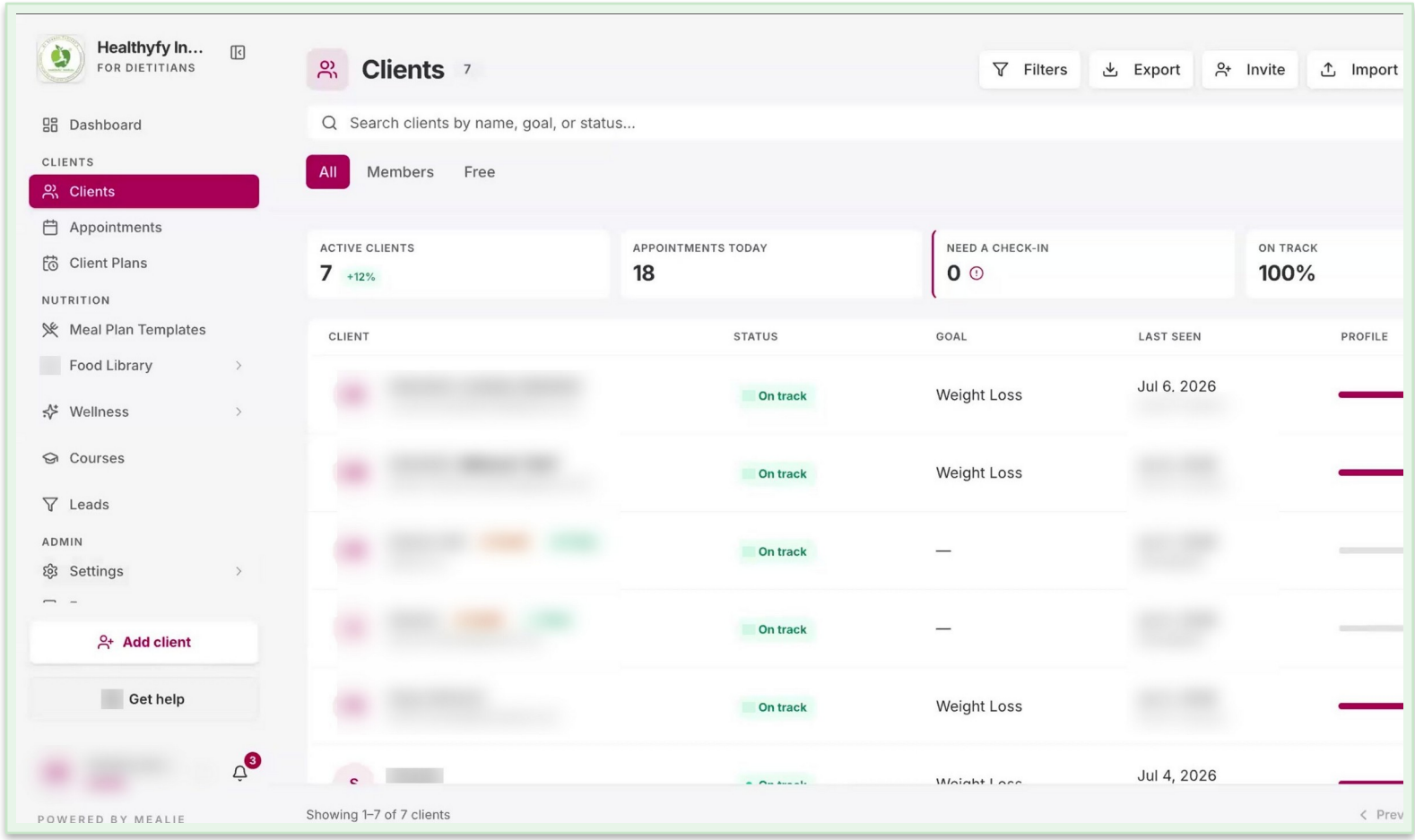
Last: White label

Step 34: optional — sabke paas nahi

STEP 1 A · SETUP

Step 1: Account banaiye aur login kijiye

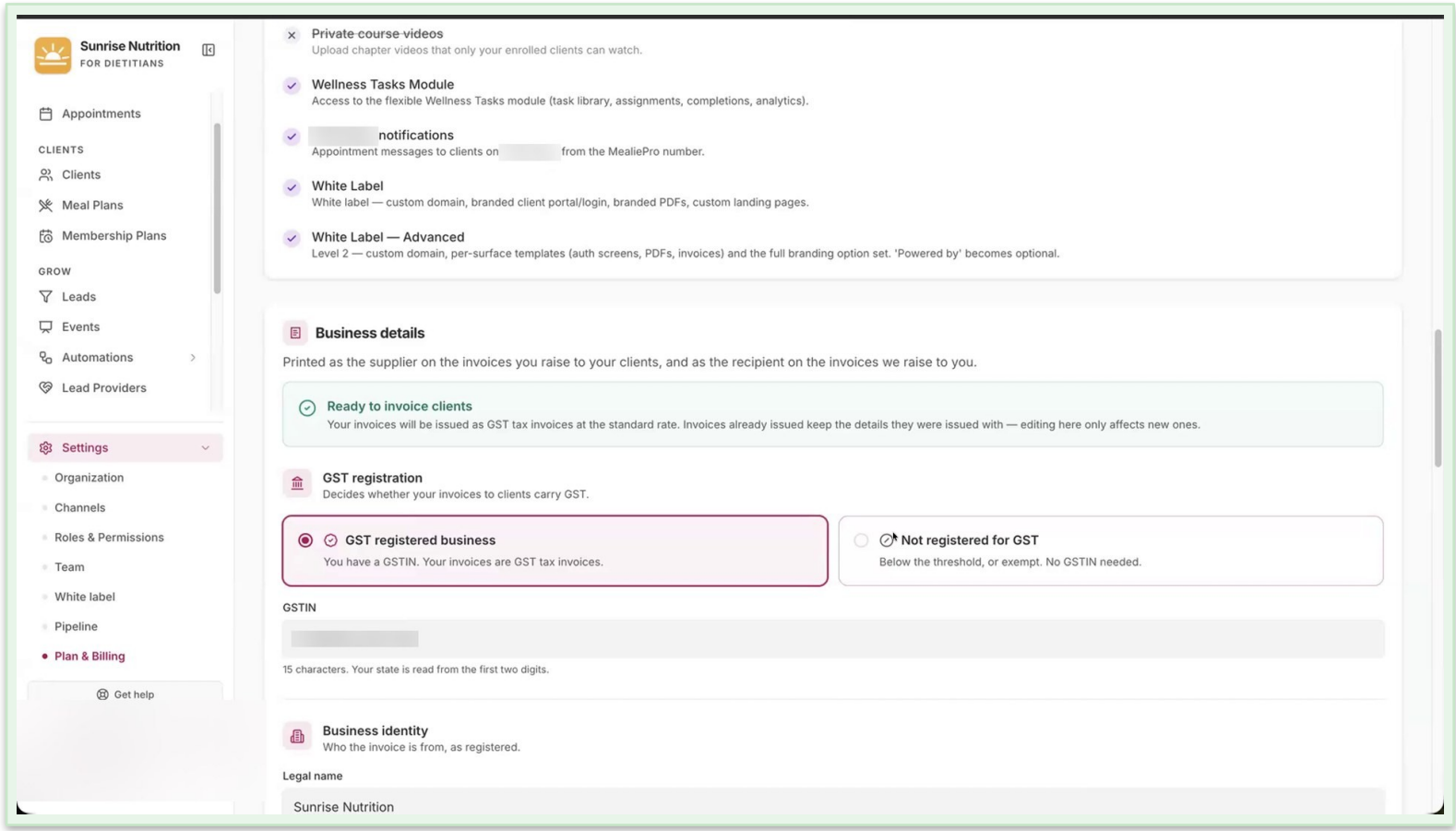
- Email me aaya invite link kholiye aur apna password set kariye.
- Phir business.mealiepro.com par wahi email aur password se login kariye.
- Login ke baad Dashboard aur left menu dikhega: Clients, Appointments, Meal Plans, Leads, Settings.
- Password match na ho to naya invite link mangwaiye — purana link expire ho sakta hai.



STEP 2 A · SETUP

Step 2: Business details aur payment set kijiye

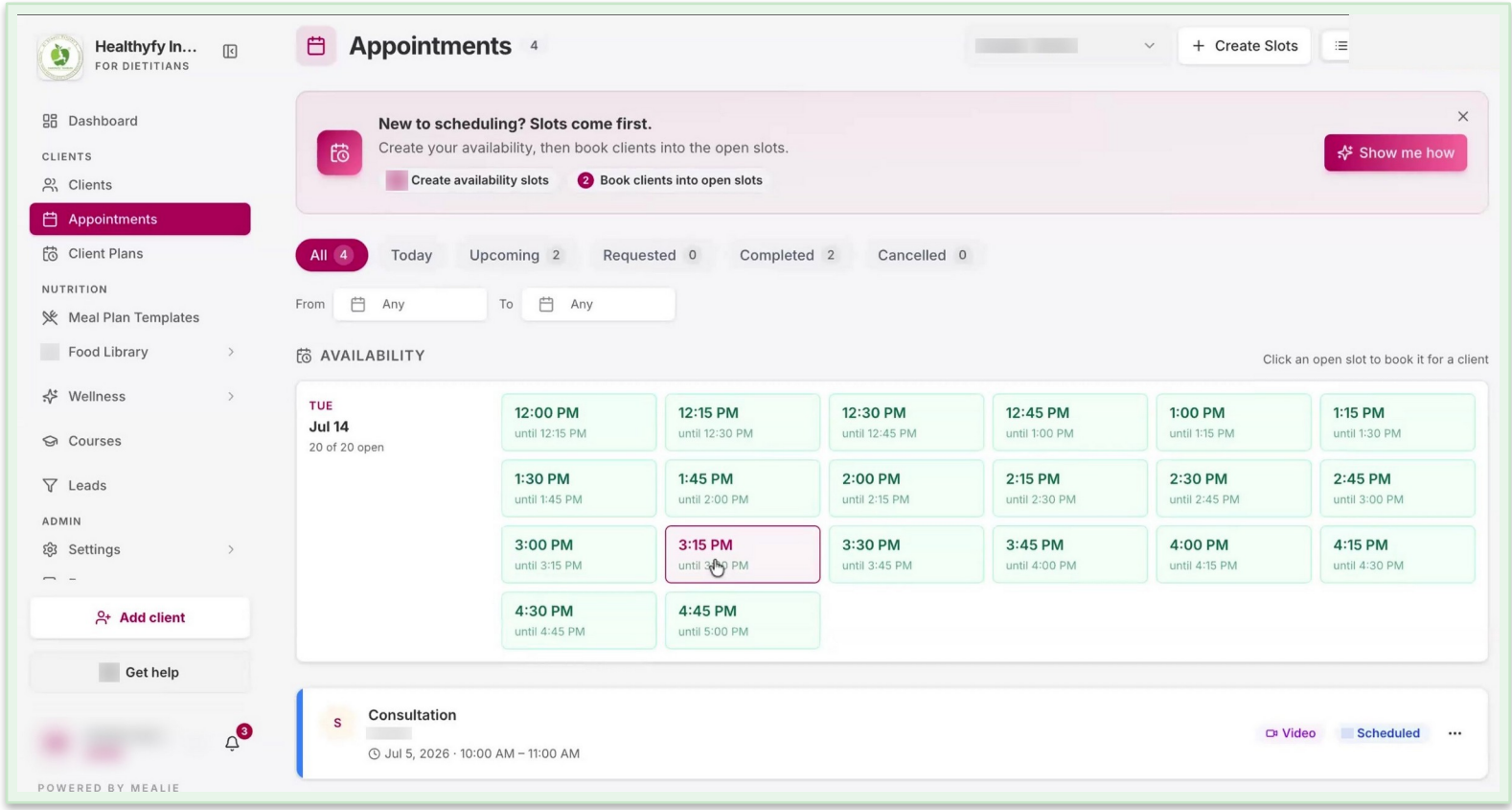
- Business details (GST number, address) invoice par print hote hain.
- Payment ke liye UPI details ya online payment (bank verify) set kariye.
- Settings → Plan & Billing me add-ons: private course videos, wellness tasks, notifications.



STEP 3 A · SETUP

Step 3: Appointments: apna time block banaiye

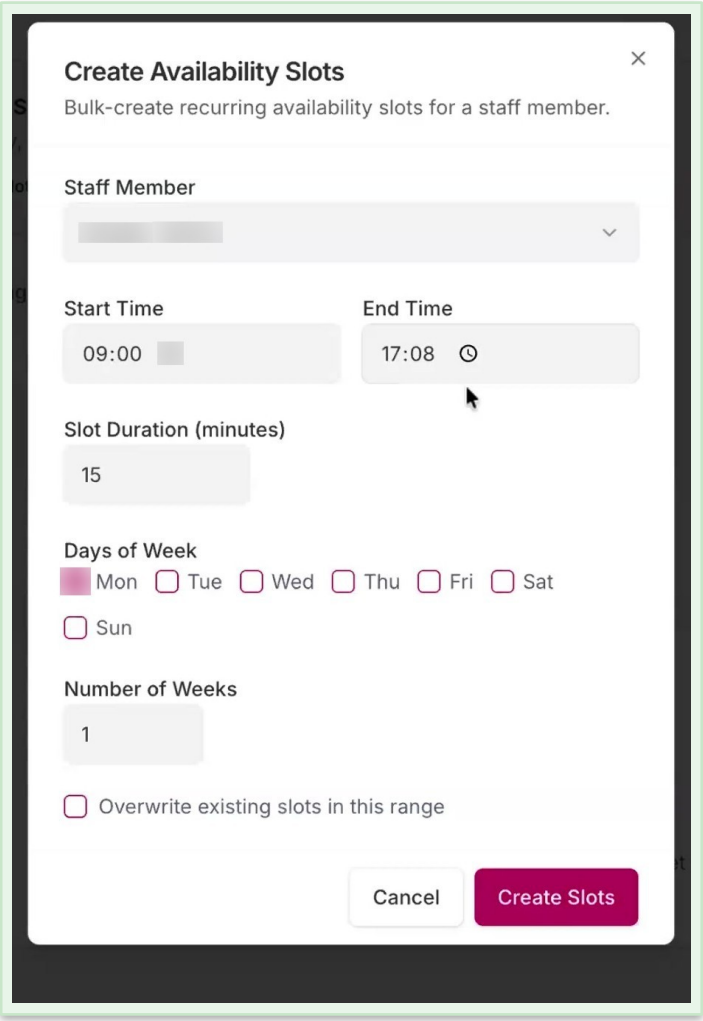
- Client enroll karne se pehle apni availability ke slots bana lijiye.
- Menu → Appointments → Create slots.
- Baad me client / lead inhi khule slots me booking karega.
- Upcoming, Requested, Completed, Cancelled — sab yahin dikhte hain.



STEP 4 A · SETUP

Step 4: Availability slots set kijiye

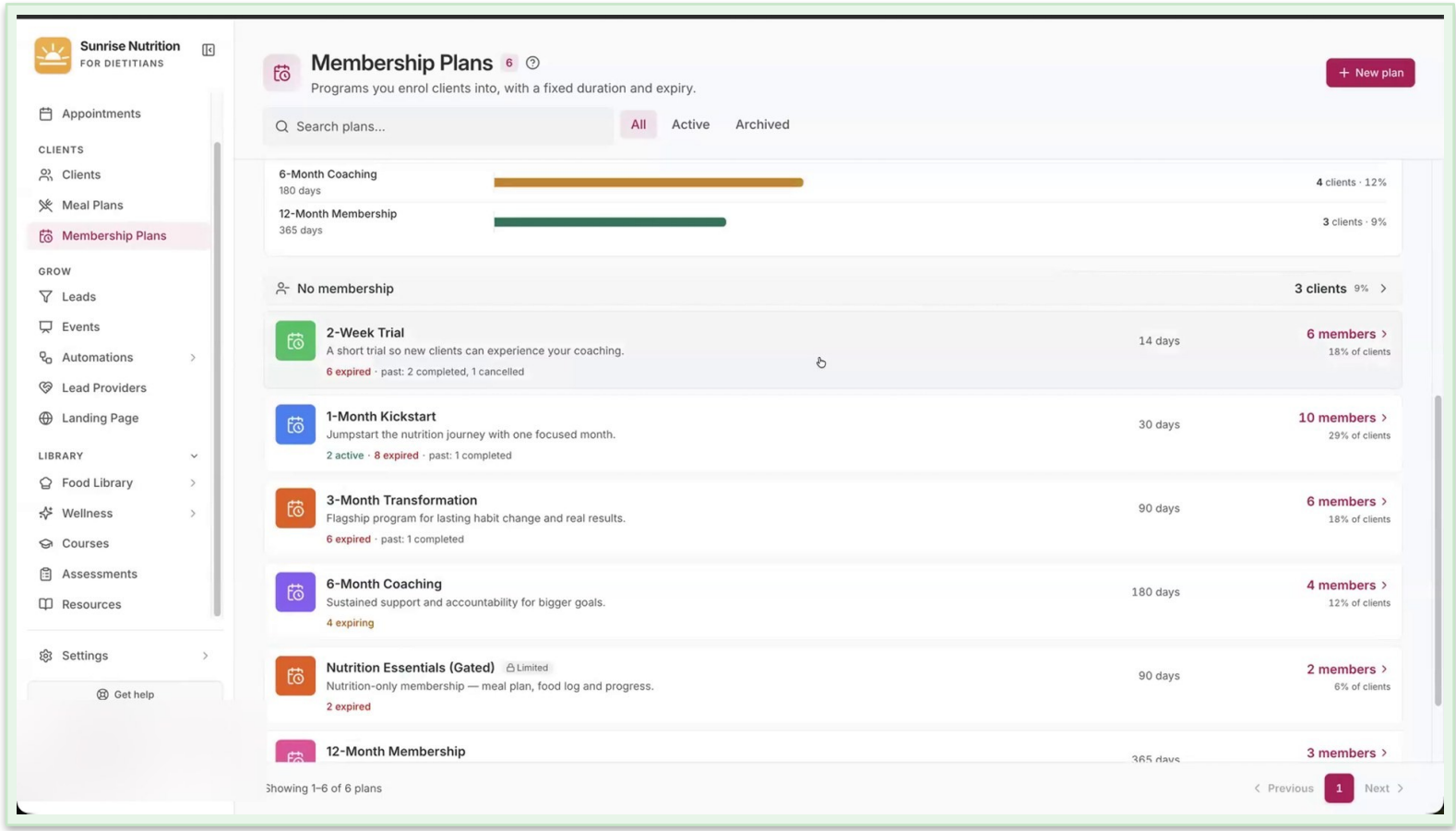
- Create slots: staff member, start aur end time chuniye.
- Slot duration (minutes) aur din (Mon–Sun) chuniye.
- Kitne hafte ke liye banana hai wo daaliye — slots ek saath ban jaate hain.



STEP 5 A · SETUP

Step 5: Membership plans banaiye

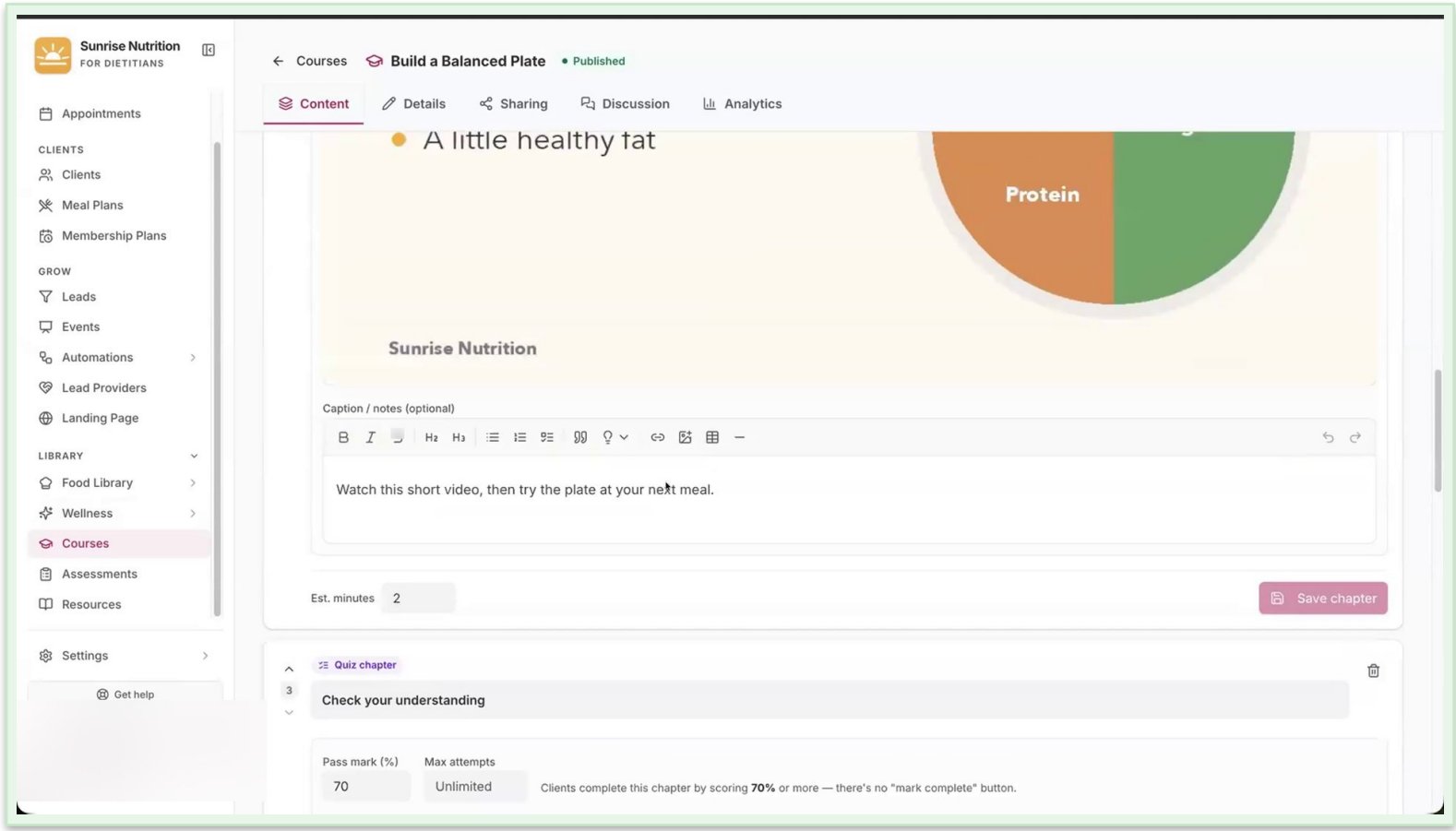
- Menu → Membership Plans: har plan ki fixed duration aur expiry.
- Alag levels banaiye: 2-Week Trial, 1-Month Kickstart, 3 / 6 / 12 Month.
- Har plan me features aur courses include kariye.
- Plan khatam hone par access band — automation se renewal ka message.



STEP 6 A · SETUP

Step 6: Course banaiye

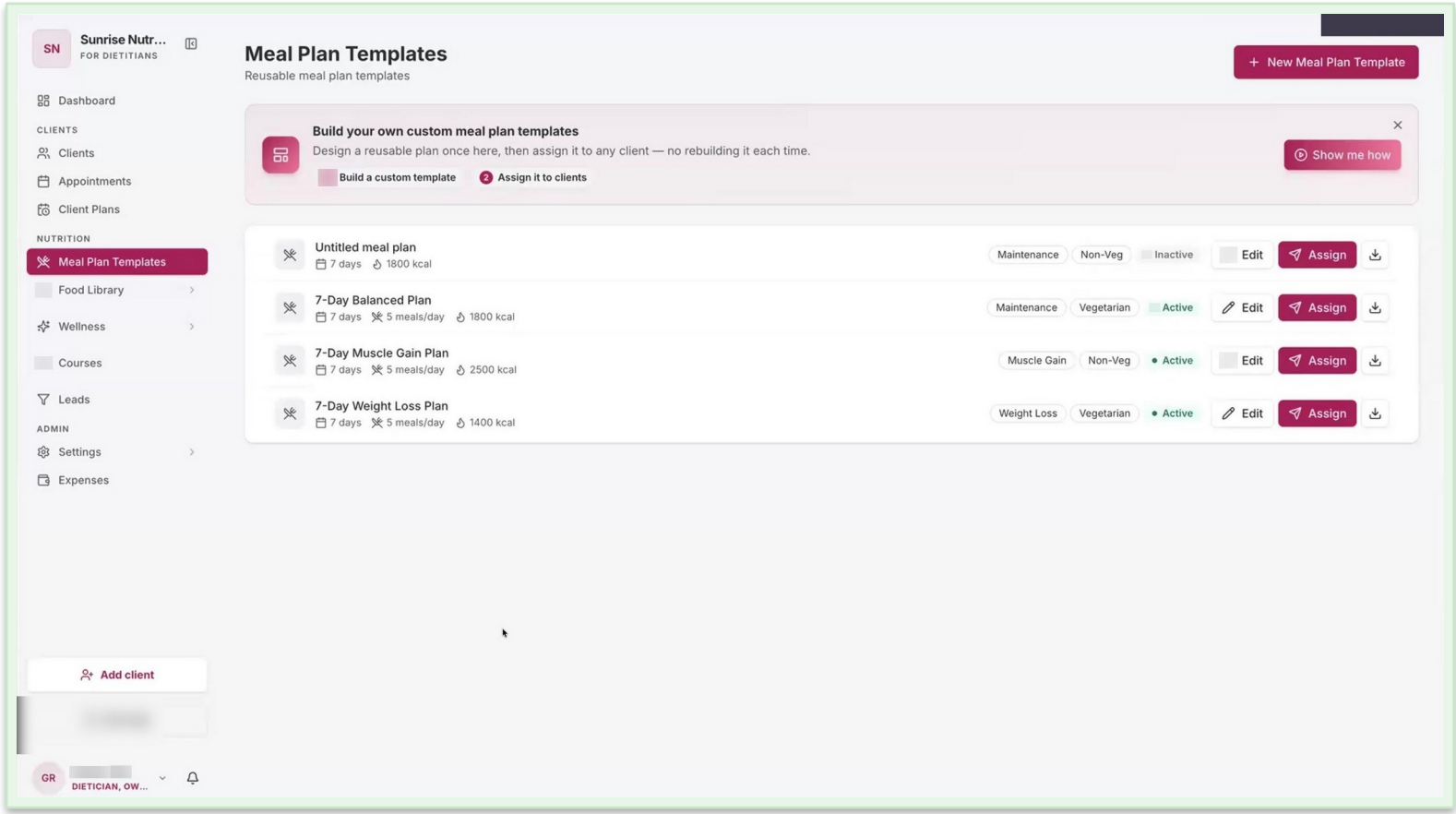
- LIBRARY → Courses → naya course → chapters jodiye.
- Chapter: text, video link ya apna private video upload (15 GB tak).
- Quiz chapter: pass mark set kariye — pass hone par hi agla chapter.
- Course ko website par feature kariye ya membership plan me daaliye.



STEP 7 A · SETUP

Step 7: Meal plan templates

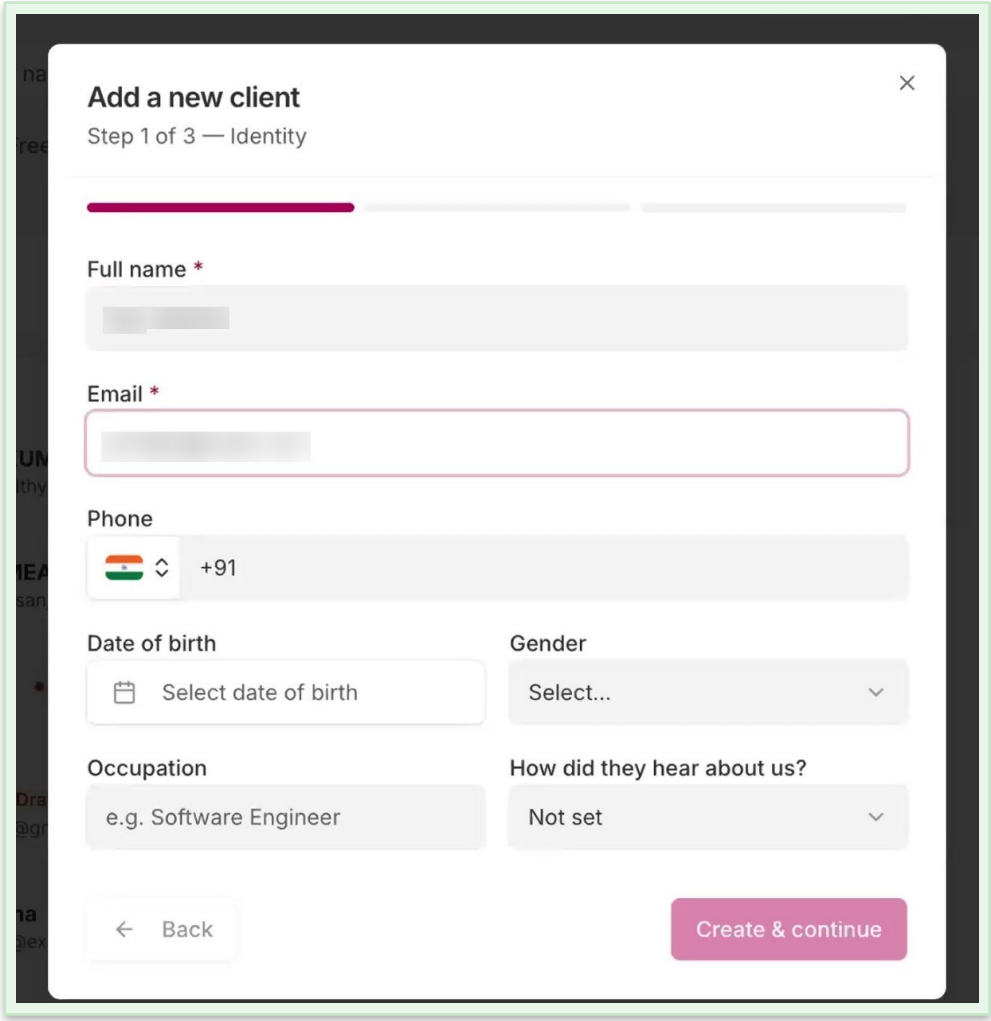
- Meal Plan Templates: ek baar plan banaiye, kai clients ko dijiye.
- Ready templates: weight loss, maintenance, muscle gain — veg / non-veg.
- Template edit karke ready rakhiye — client aane par seedha assign.



STEP 8 B · CLIENTS

Step 8: Naya client add kijiye

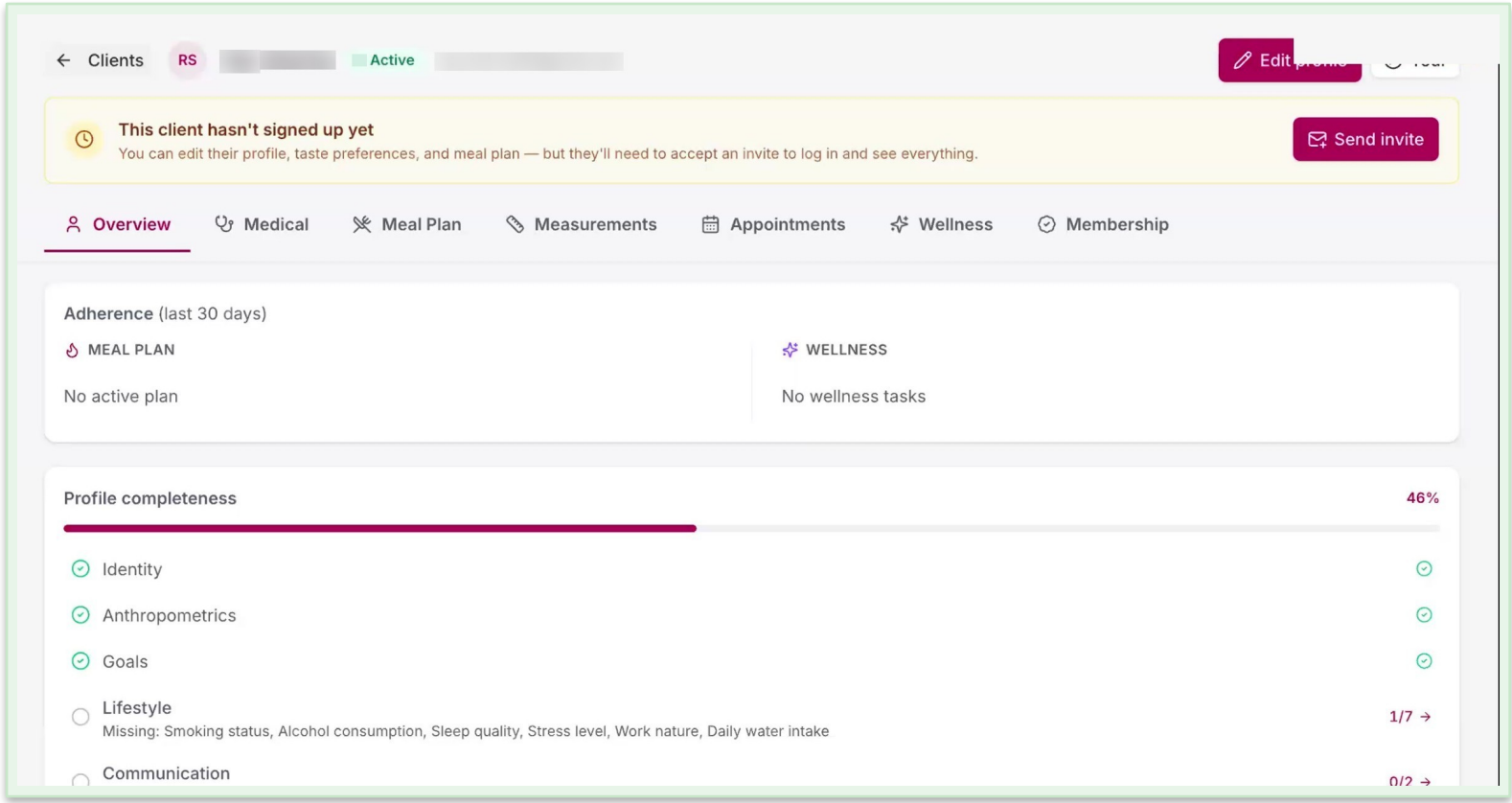
- Clients → Add client: Step 1 Identity — naam, email, phone, date of birth.
- Step 2 me goals aur body details (height, weight, target) bhariye.
- Step 3 me chahe to abhi plan chuniye, ya “No plan” rakh ke baad me dijiye.



STEP 9 B · CLIENTS

Step 9: Client profile aur invite

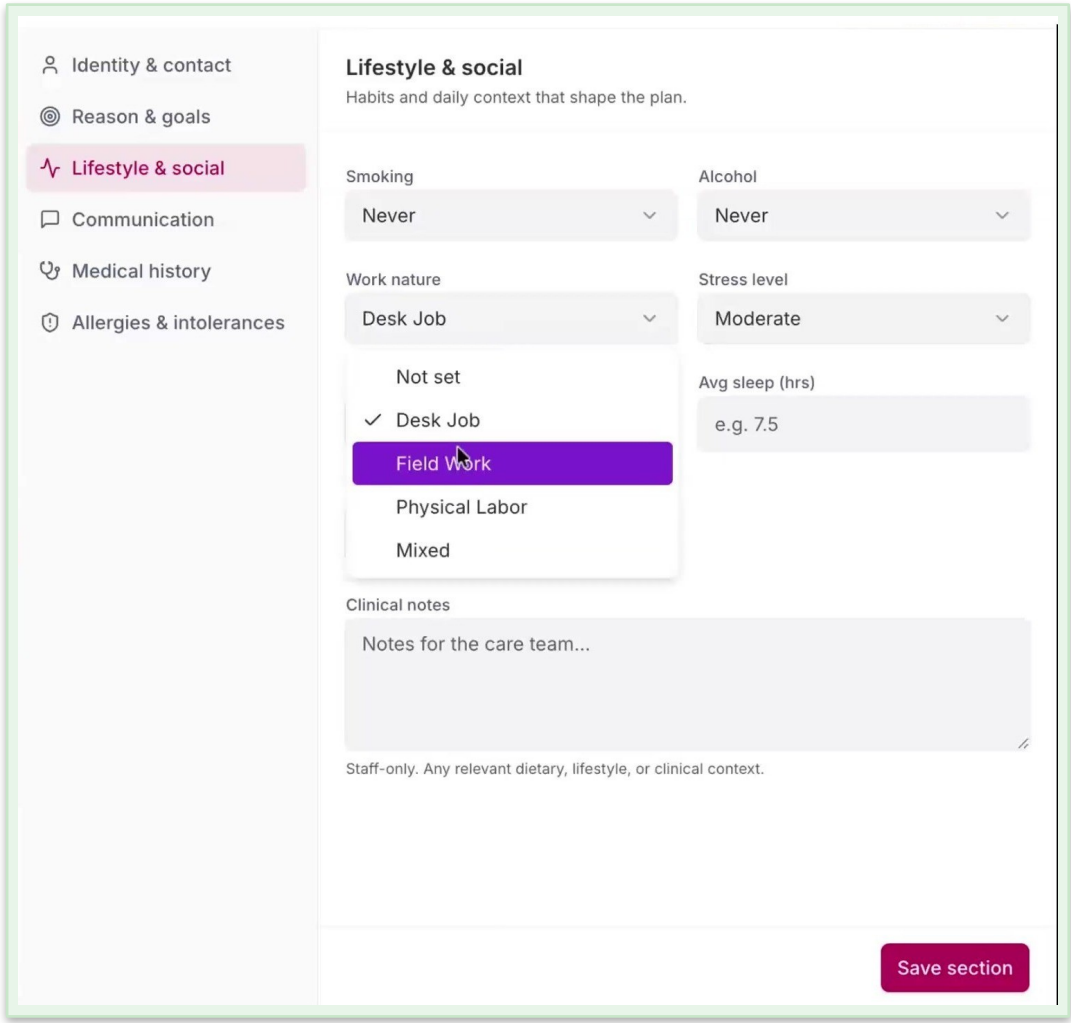
- Client add hote hi uska profile khulta hai — Overview, Medical, Meal Plan, Measurements, Appointments, Wellness, Membership.
- “Send invite” dabaiye — client ko email jaata hai, wo apna login banata hai.
- Profile completeness % dikhta hai — jo missing hai wo yahin dikhta hai.



STEP 10 B · CLIENTS

Step 10: Profile poora kijiye: lifestyle aur habits

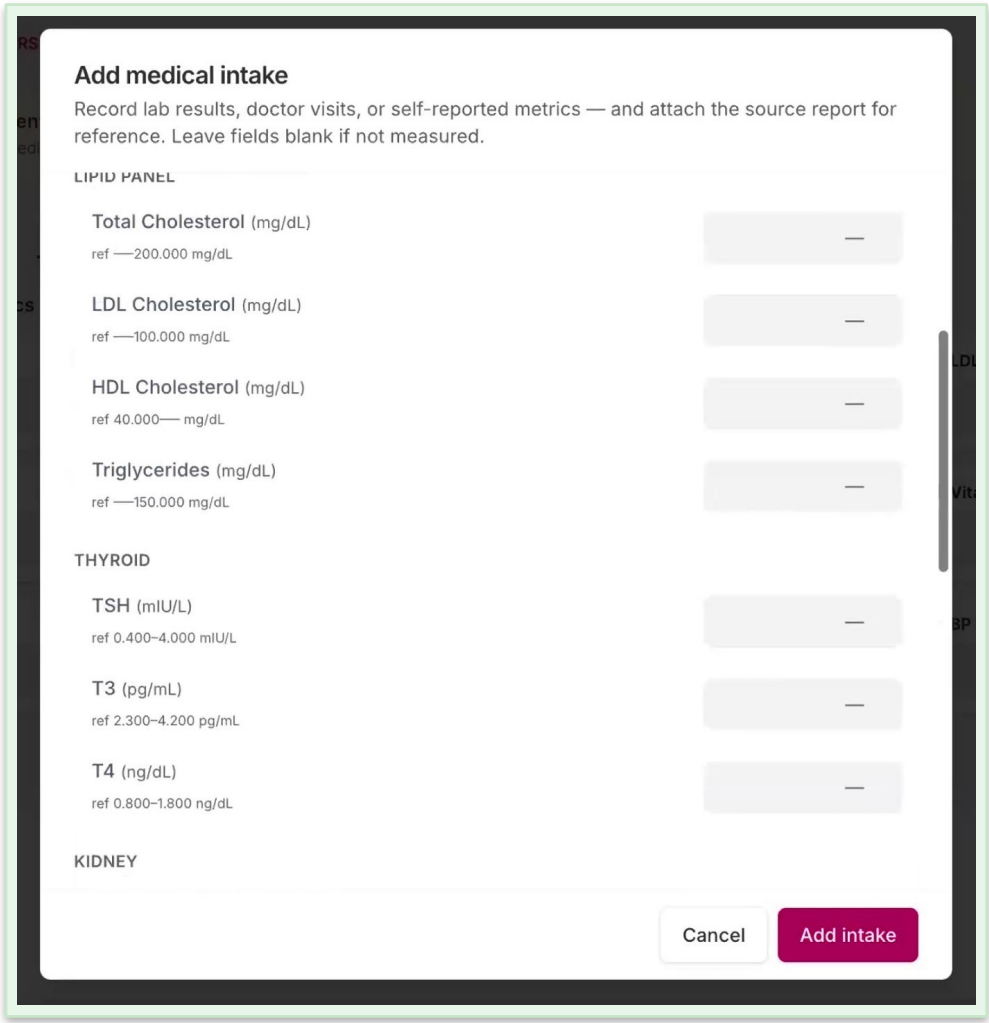
- Edit profile → Lifestyle & social: smoking, alcohol, work nature, stress, sleep.
- Communication: preferred contact method aur language.
- Medical history: conditions, medicines, supplements, allergies.
- Jitni details bharenge, meal plan utna sahi banega.



STEP 11 B · CLIENTS

Step 11: Medical intake aur lab reports

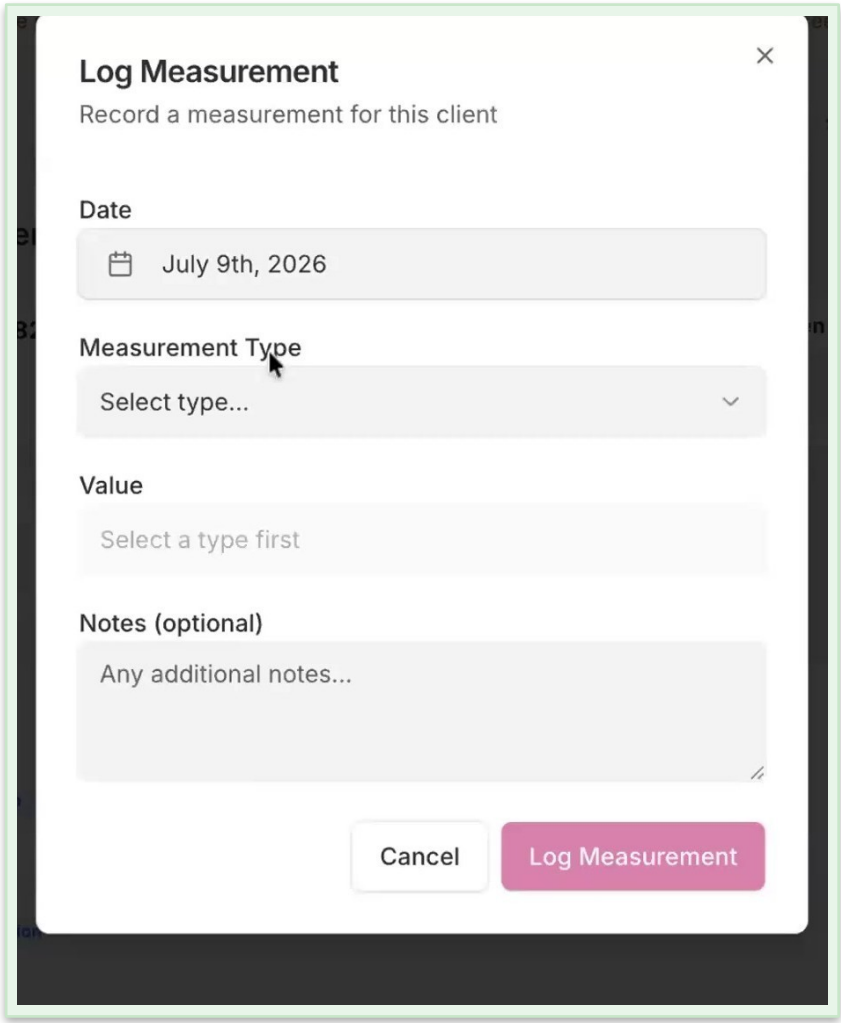
- Medical tab → Add medical intake.
- Lab values bhariye: lipid panel, thyroid, sugar (HbA1c) aadi — jo test nahi hua wo khaali chhodiye.
- Report ki file bhi attach kar sakte hain.
- Range se bahar wali value apne aap highlight hoti hai.



STEP 12 B · CLIENTS

Step 12: Measurements log kijiye

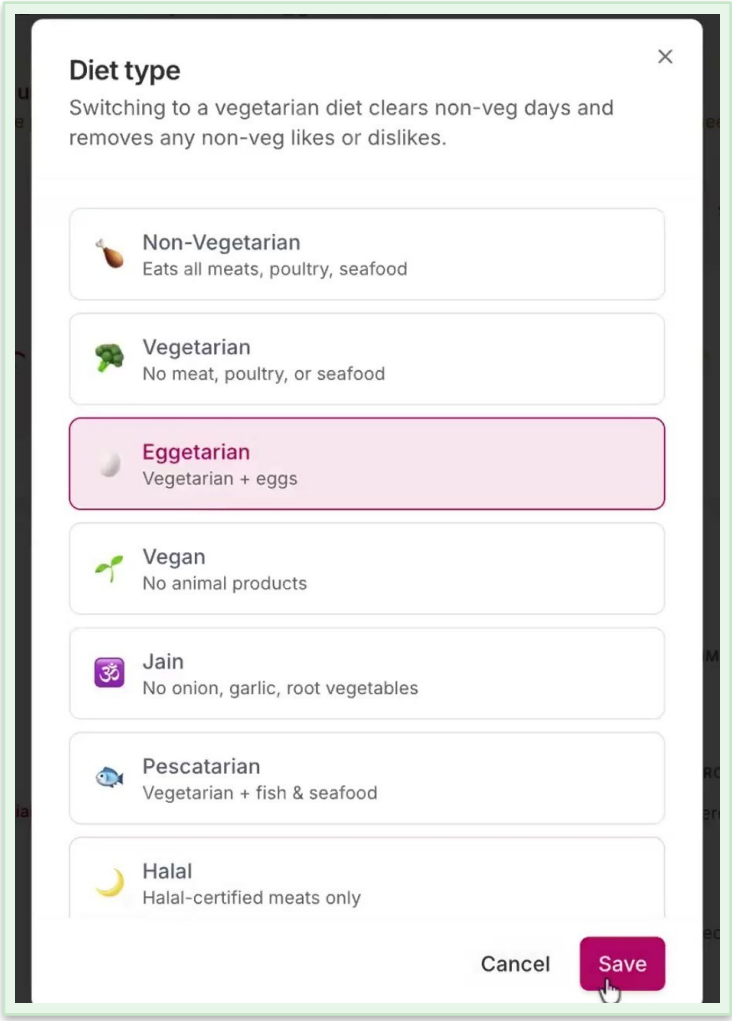
- Measurements tab → Log measurement.
- Date, type (weight, waist, body fat) aur value daaliye.
- BMI aur progress apne aap dikhta hai — har check-in par update kariye.



STEP 13 B · CLIENTS

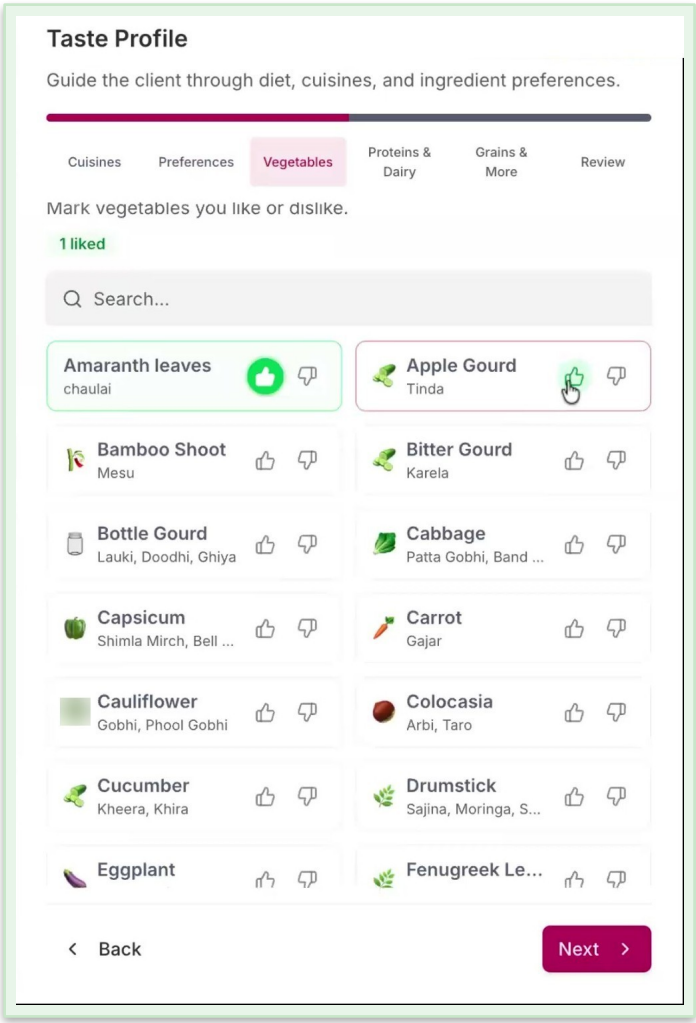
Step 13: Diet type chuniye

- Meal plan banane se pehle diet type set kariye.
- Options: Non-Veg, Vegetarian, Eggetarian, Vegan, Jain.
- Diet badalne par us diet me na chalne wale foods apne aap hat jaate hain.



Step 14: Taste profile: pasand aur napasand

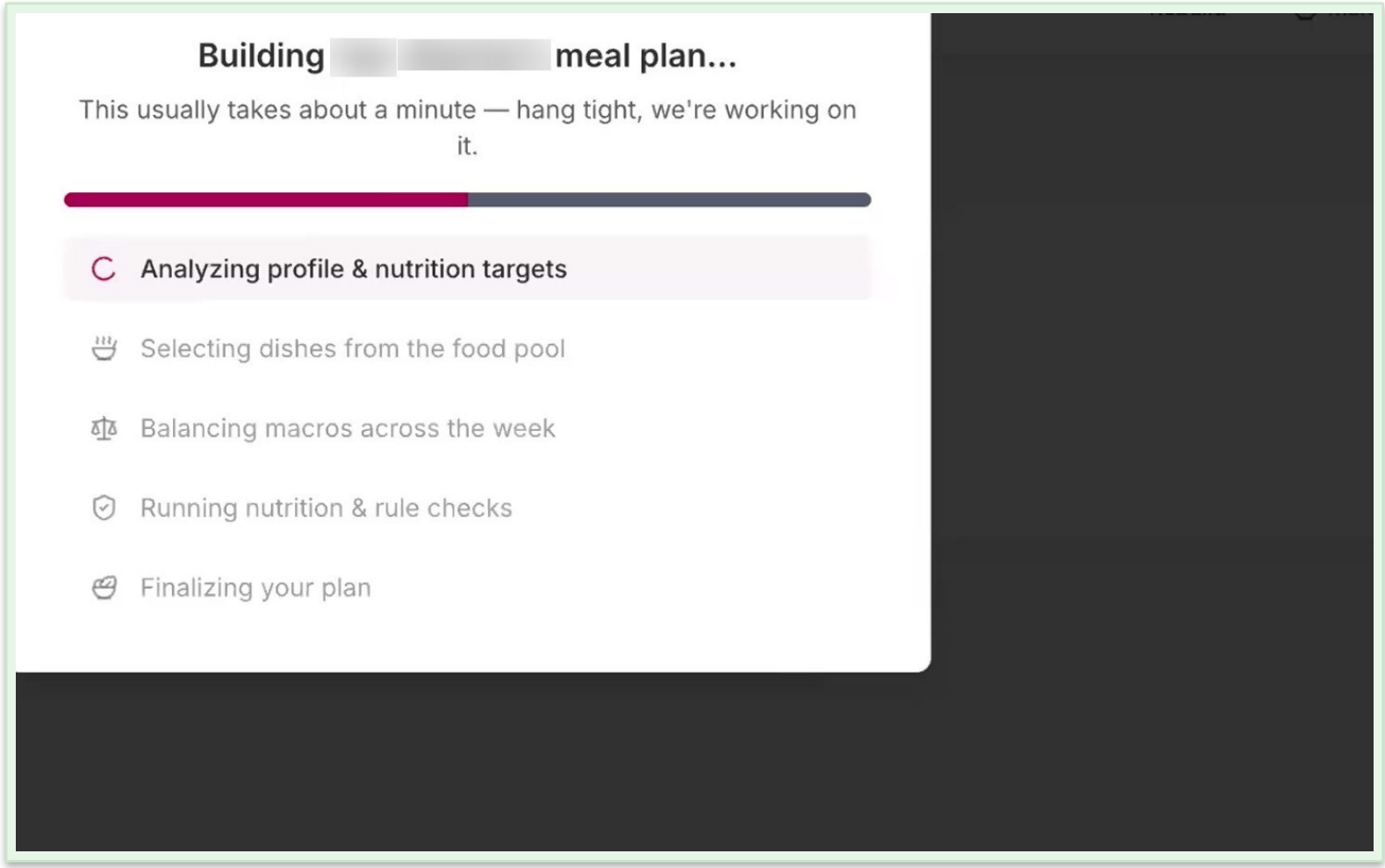
- Taste Profile wizard: proteins, grains, vegetables, dairy, cuisines.
- Har food ko Like ya Dislike mark kariye — search se jaldi milta hai.
- Client khud bhi apne login se ye bhar sakta hai.
- Review karke save kariye — meal plan isi hisaab se banega.



STEP 15 B · CLIENTS

Step 15: Meal plan banaiye

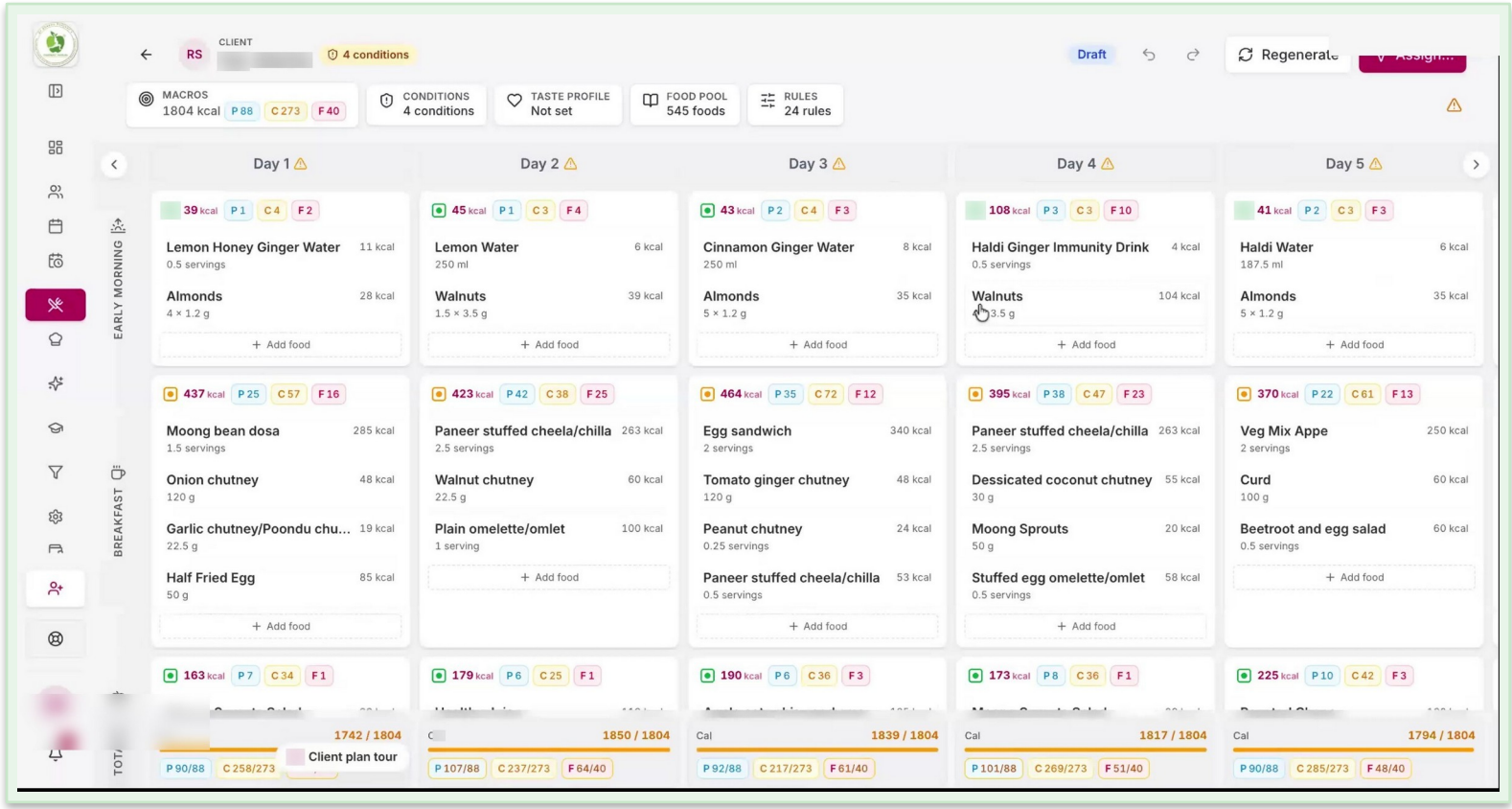
- Client profile → Meal Plan → Build meal plan.
- Mealie profile, goals aur nutrition targets dekh ke plan banata hai.
- Lagbhag ek minute lagta hai — tab tak wait kariye.



STEP 16 B · CLIENTS

Step 16: 7-din ka plan check kijiye

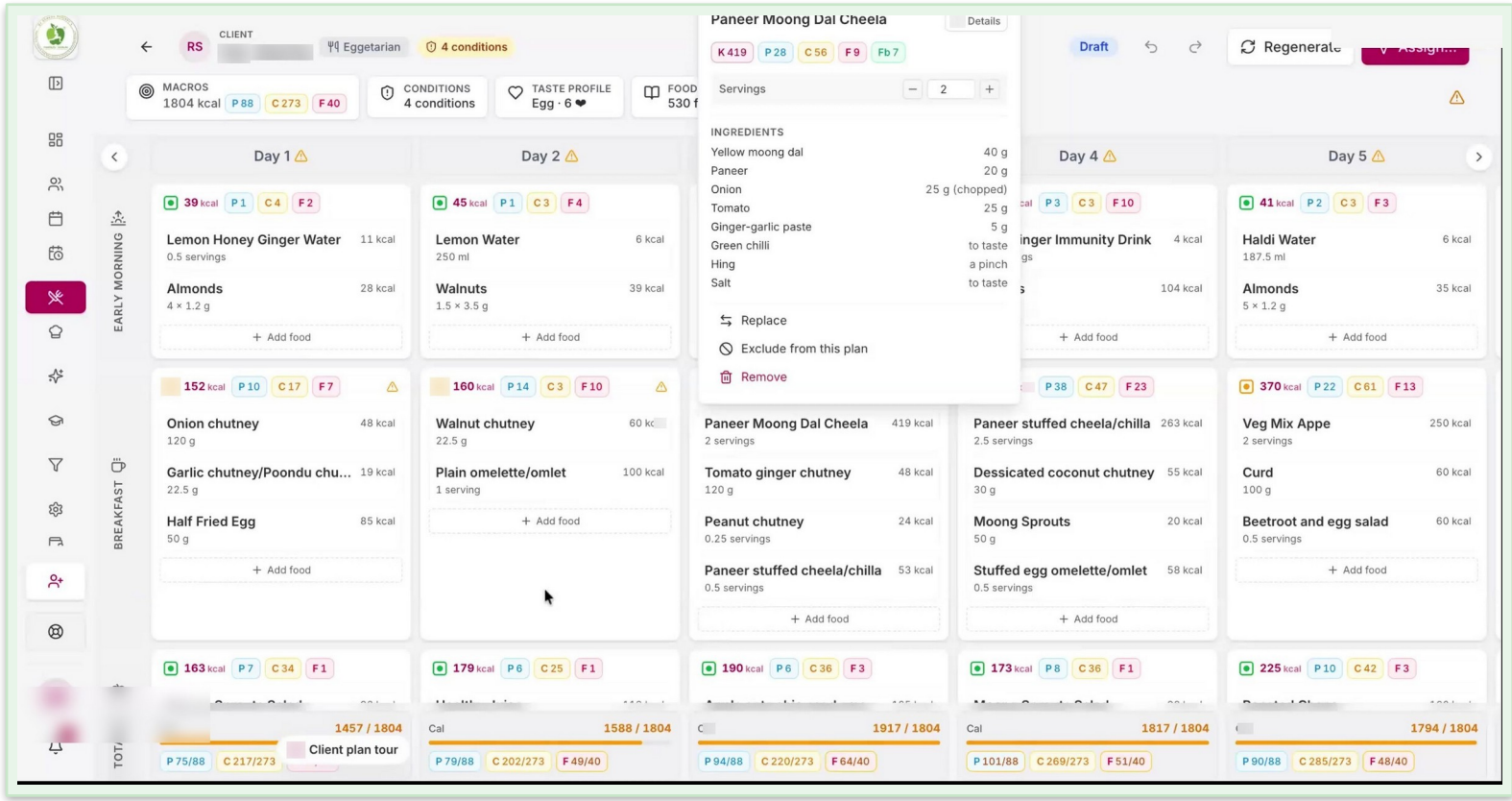
- Har din ke meals grid me: early morning, breakfast, lunch, dinner aadi.
- Upar calories aur macros (protein, carbs, fat) ka total dikhta hai.
- “+ Add food” se koi bhi item jodiye.
- Plan Draft me rehta hai jab tak aap assign na kariye.



STEP 17 B · CLIENTS

Step 17: Food badliye ya hataiye

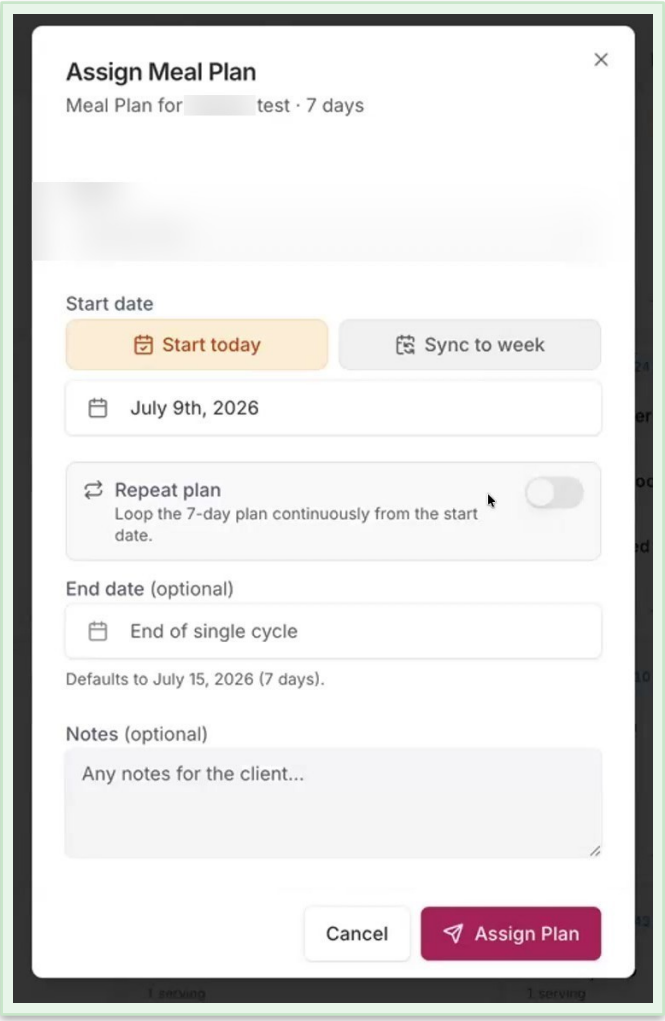
- Kisi bhi meal item par click kariye — ingredients aur quantity dikhte hain.
- Replace: us item ki jagah doosra option.
- Exclude from this plan: ye item poore plan me nahi aayega.
- Remove: sirf us din se hataiye.



STEP 18 B · CLIENTS

Step 18: Meal plan client ko assign kijiye

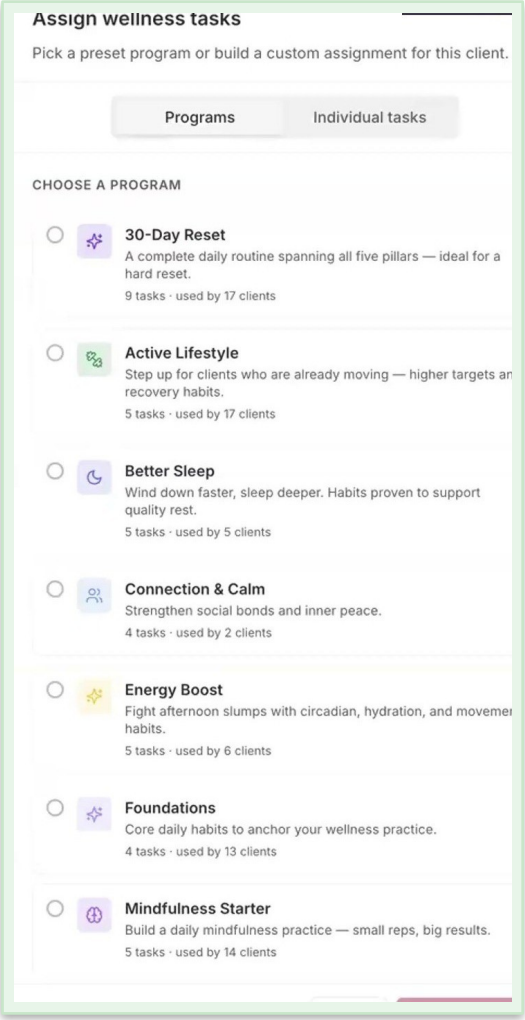
- Plan theek lage to Assign dabaiye.
- Start date chuniye; chahe to plan repeat on kariye.
- End date aur client ke liye notes bhi daal sakte hain.
- Client ko apne login / app me plan dikhne lagta hai; PDF bhi export hota hai.



STEP 19 B · CLIENTS

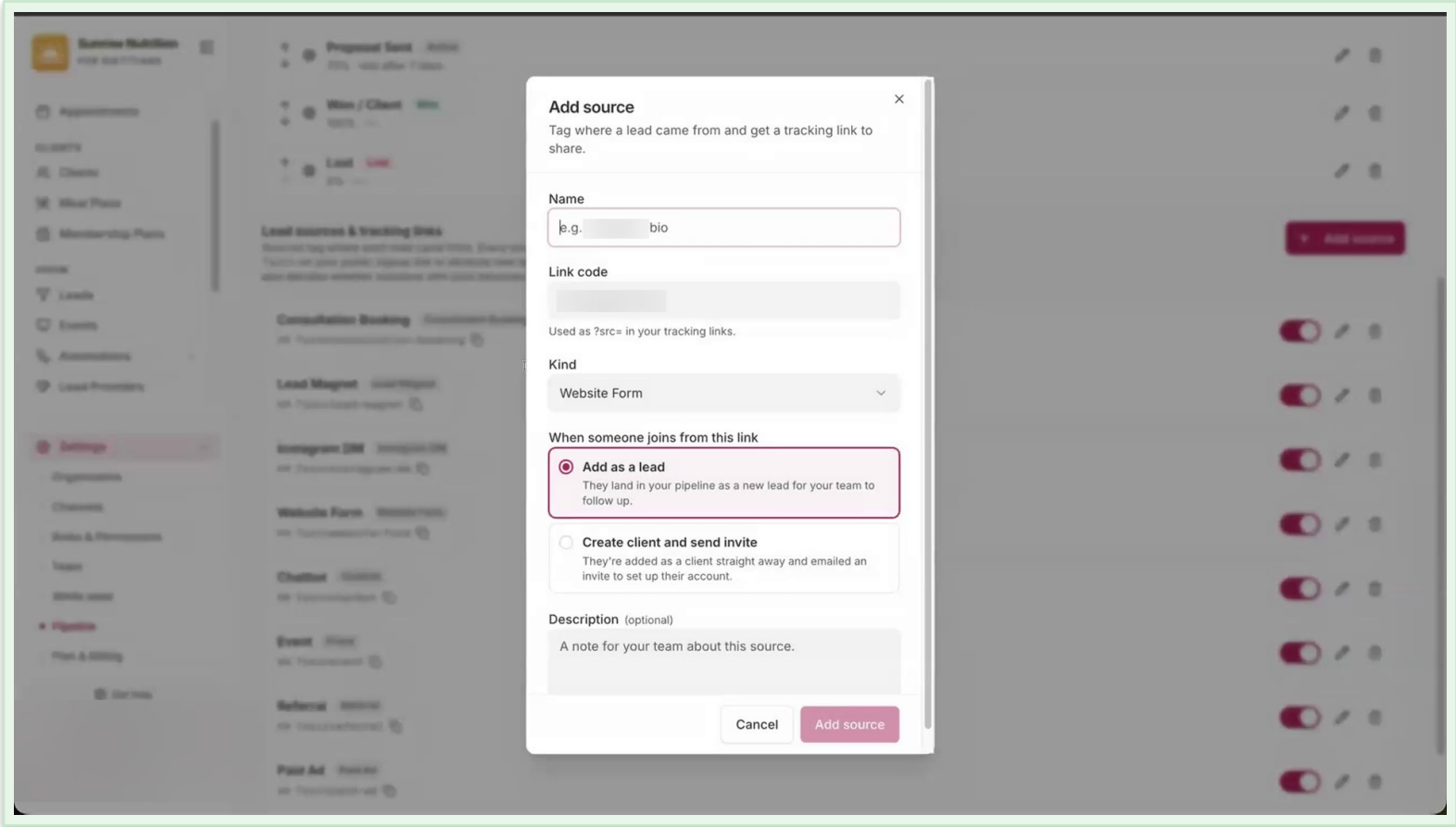
Step 19: Wellness tasks dijiye

- Client profile → Wellness → Assign wellness tasks.
- Ready programs: 30-Day Reset, Better Sleep, Energy Boost, Foundations aadi.
- Ya Individual tasks chun ke apna program banaiye.
- Wellness profile me focus areas set kariye — affirmations usi hisaab se bante hain.



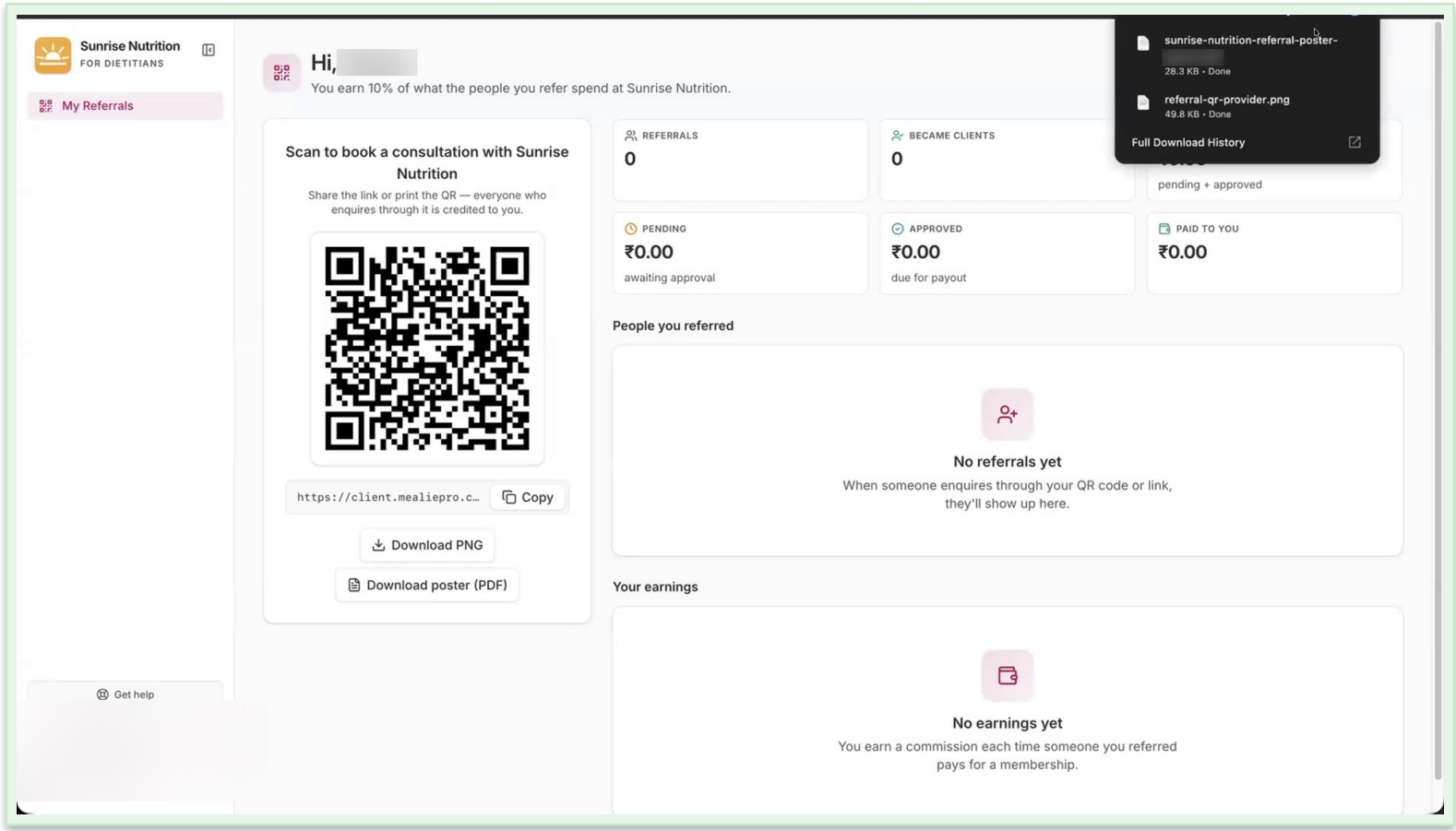
Step 20: Lead source ka tracking link banaiye

- Settings → Pipeline → Lead sources → Add source.
- Source ka naam likhiye (jaise “social media bio”), link code apne aap banta hai.
- Chuniye: lead ki tarah aaye ya seedha client ban jaaye.
- Link copy karke bio, website ya post me lagaiye — har lead ka source track hoga.



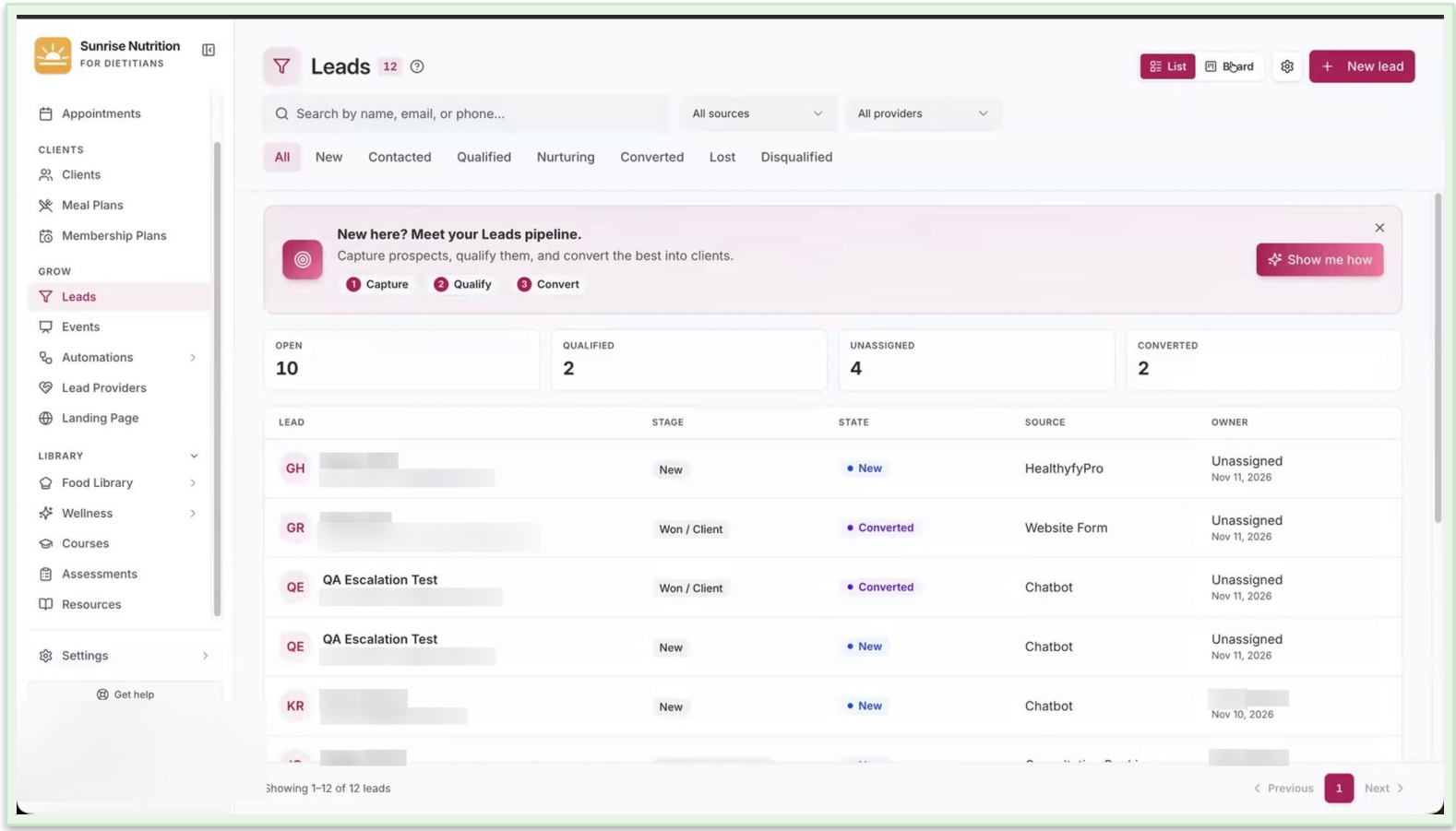
Step 21: Lead Providers: referral se leads

- GROW → Lead Providers → provider jodiye aur commission set kariye (jaise 10%).
- Provider ko milta hai apna link, QR code aur poster (PNG / PDF) — print karke laga sakte hain.
- Us link se aaye har lead ka credit provider ko — dashboard me pending / approved dikhte hain.
- Commission ka payment aap khud karte hain.



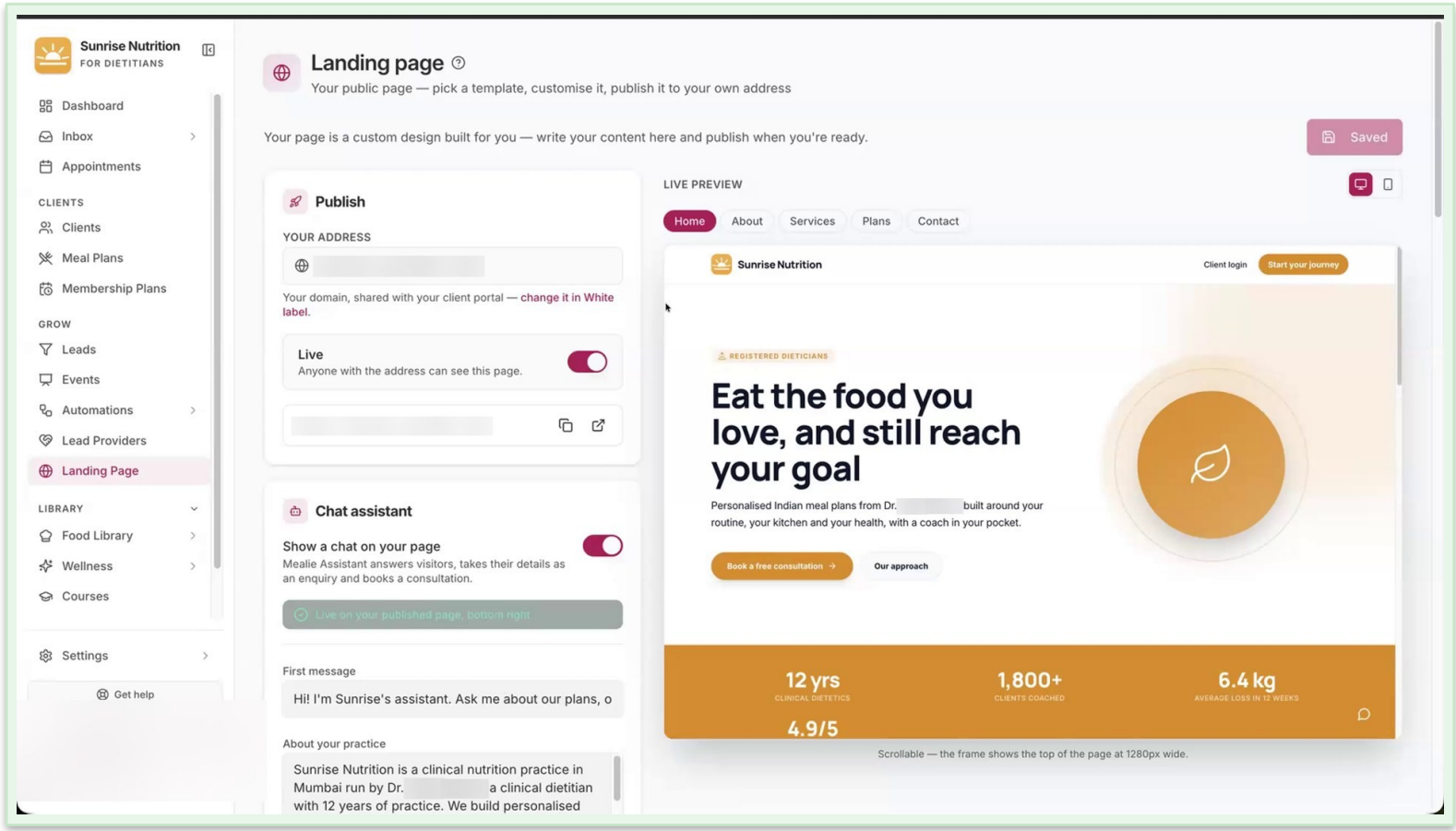
Step 22: Pipeline stages set kijiye

- Leads ki list view me stages: New, Contacted, Qualified, Nurturing, Converted, Lost.
- Settings → Pipeline me stages apne business ke hisaab se badliye.
- Naam, email ya phone se search kariye; source se filter kariye.



Step 23: Apna landing page banaiye

- GROW → Landing Page: template chuniye.
- Live preview me text, photos, fonts badliye.
- Chat assistant ON kariye — visitors se baat karke consultation book karega.
- Publish kariye; apna domain bhi jod sakte hain.

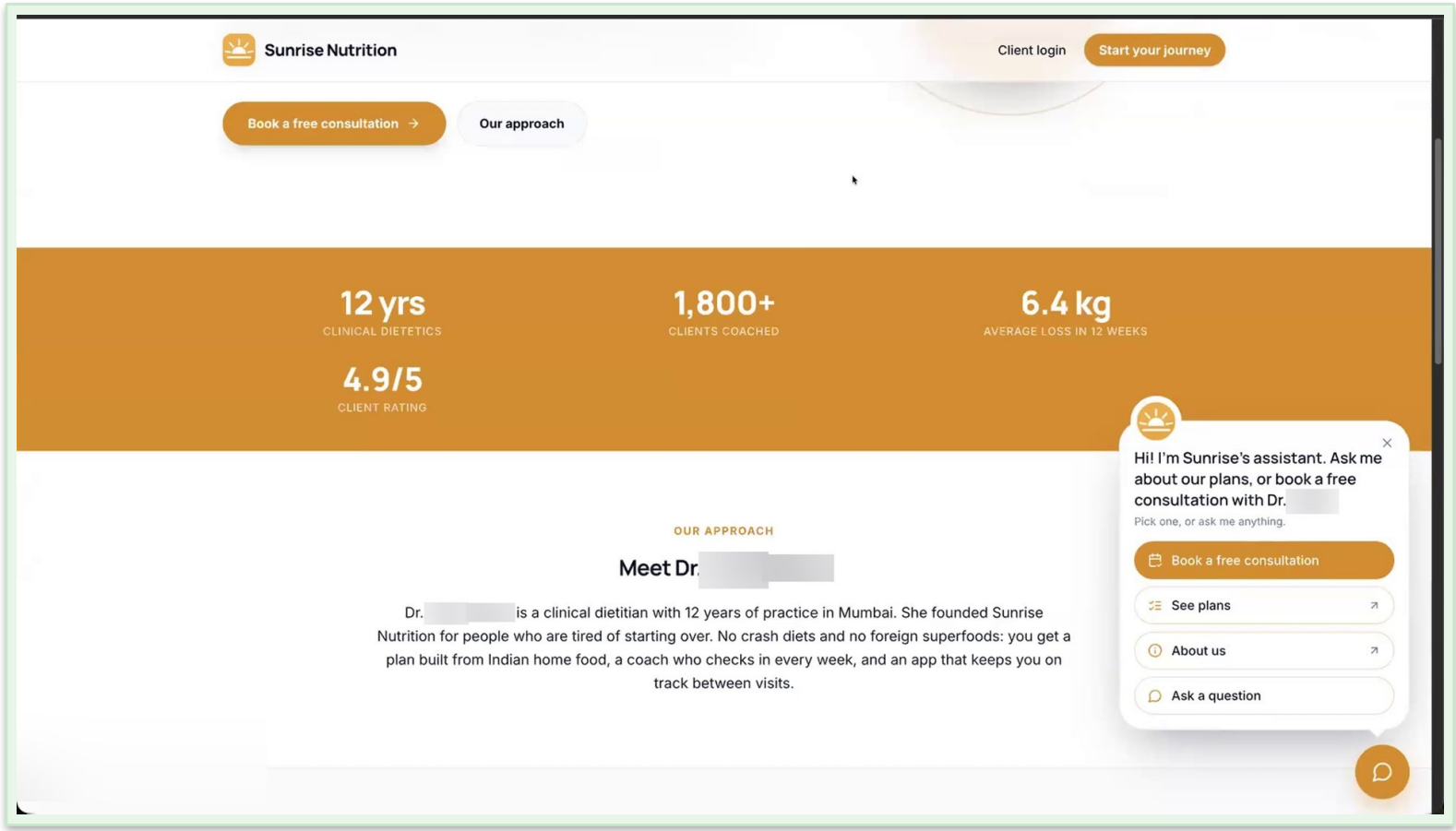


STEP 24

C · LEADS & AUTOMATION

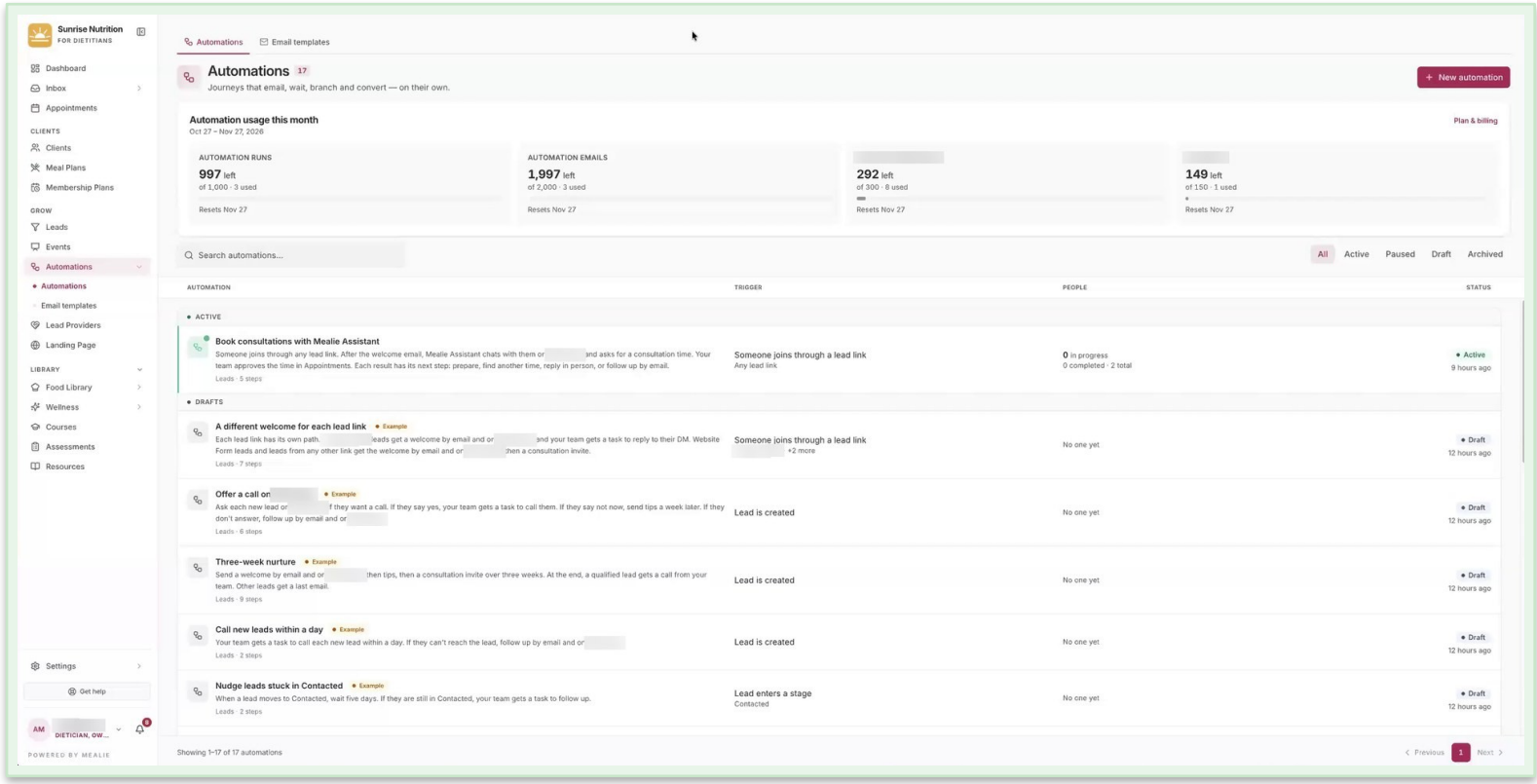
Step 24: Website pe Mealie Assistant

- Landing page ke neeche right corner me chat assistant khulta hai.
- Client plans pooch sakta hai ya free consultation book kar sakta hai.
- Assistant height, weight, age, problem jaisi details leke lead qualify karta hai.
- Phone aur email bhi le leta hai — lead seedha Leads me aati hai.



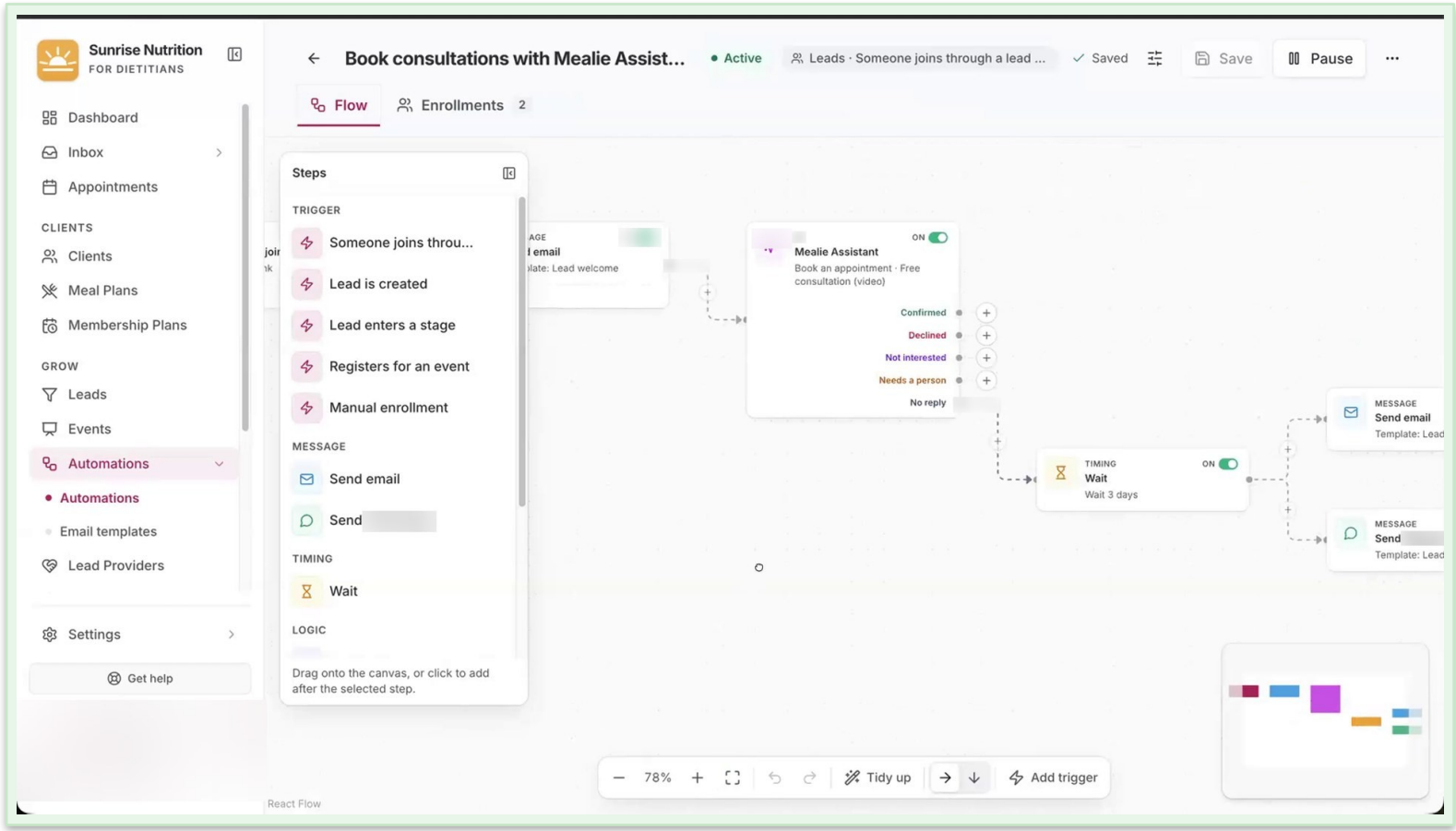
Step 25: Automations kholiye

- GROW → Automations kholiye.
- Ready flow: “Book consultations with Mealie Assistant” — Active karke use kariye.
- Upar is mahine ka usage: runs, emails, messages — har mahine reset hota hai.
- Example flows Draft me hain — copy karke apna bana sakte hain.



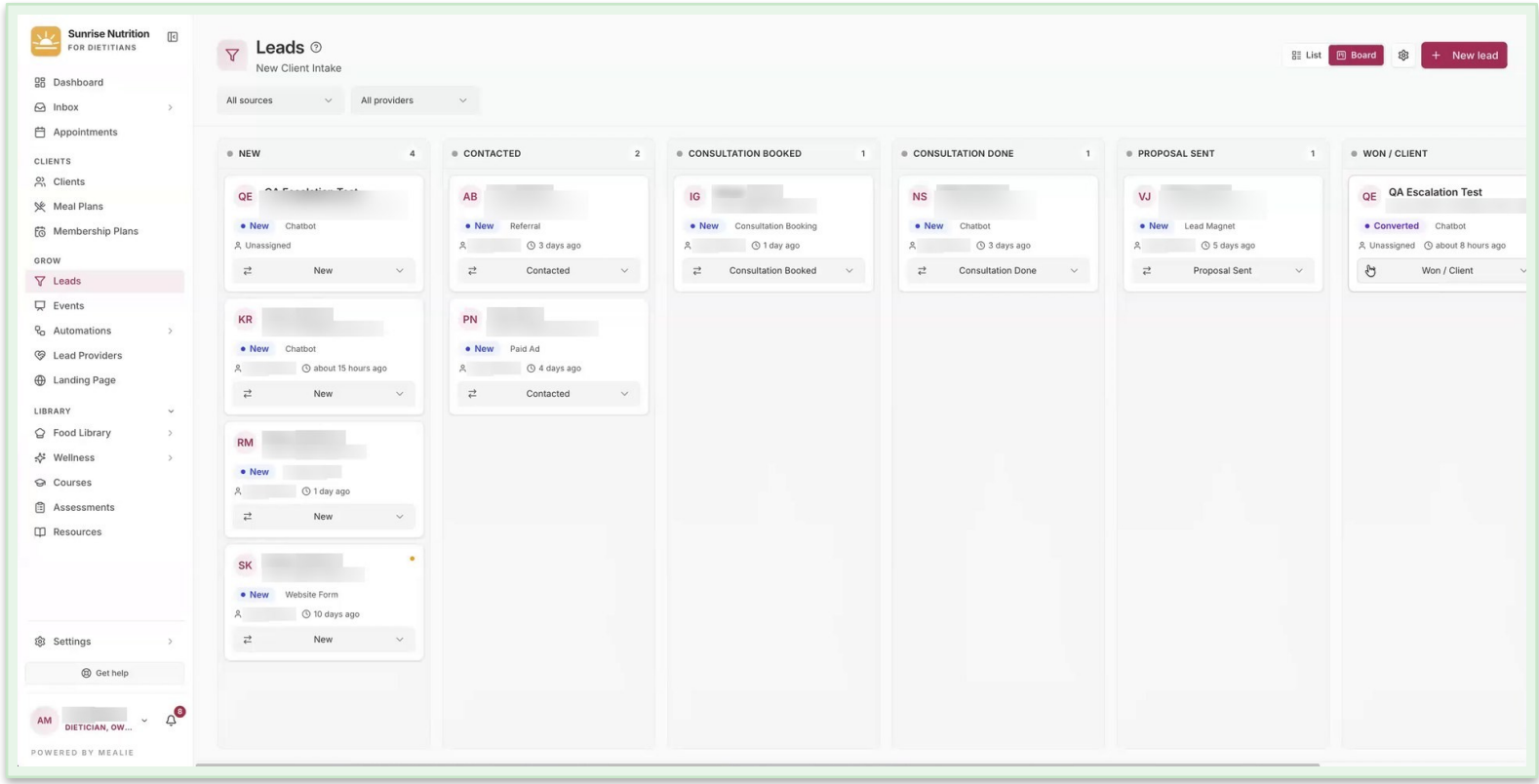
Step 26: Automation flow banaiye

- Trigger chuniye — jaise koi lead link se join kare.
- Right side se steps drag kariye: email, message, wait (jaise 3 din), logic.
- Har step ke baad agla step: Confirmed, Declined, No reply.
- Save karke Active kariye — baaki kaam apne aap hoga.



Step 27: Leads page kholiye

- Left menu me GROW → Leads kholiye.
- Har lead ek card hai, stage ke column me: New → Contacted → Consultation Booked → Done → Proposal Sent → Won/Client.
- Card pe dikhta hai lead kahan se aayi (chatbot, referral, lead magnet).
- Card ko drag karke agli stage me le jaiye.

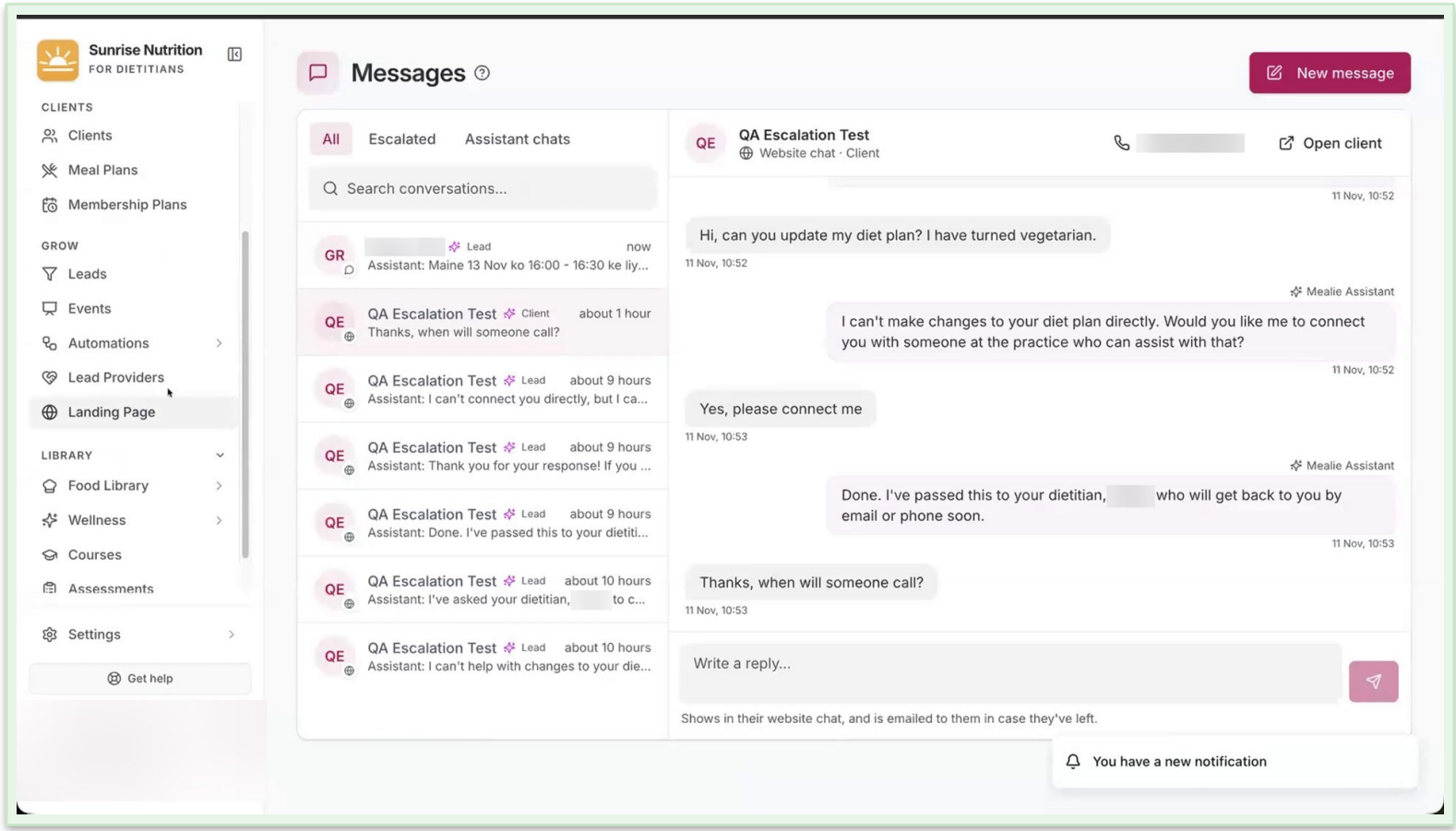


STEP 28

C · LEADS & AUTOMATION

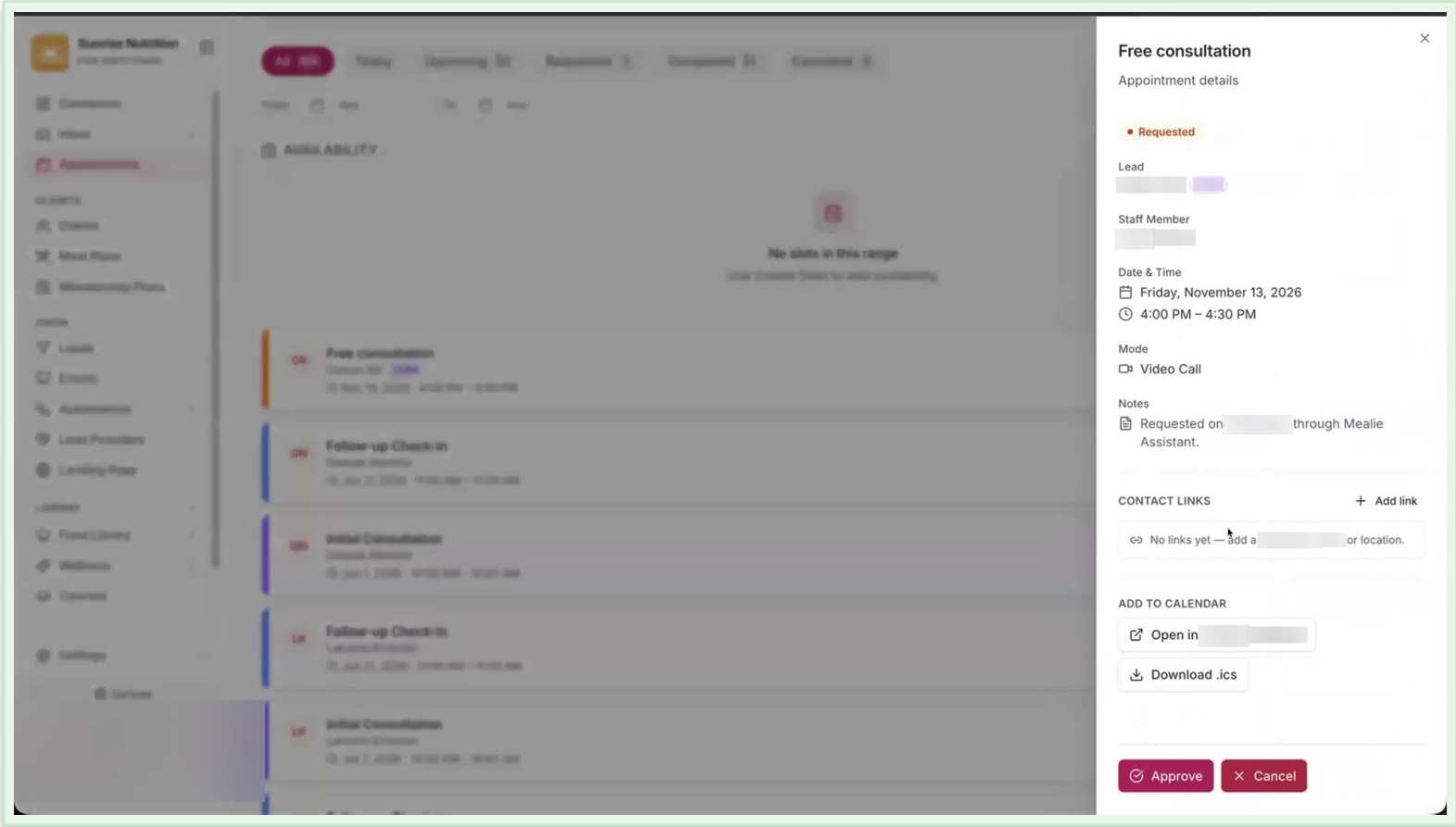
Step 28: Inbox me chats dekhiye

- Menu → Inbox: All, Escalated, Assistant chats.
- Jo baat assistant khud handle nahi karta, wo Escalated me aati hai.
- Aap wahin se client ko khud reply kariye.
- Mobile business app (Android) me bhi yahi inbox milta hai.



Step 29: Appointment approve kijiye

- Menu → Appointments: naya request “Requested” status me dikhta hai.
- Date, time aur mode (video call) check kariye.
- “Add link” se video call link ya location daaliye.
- Approve dabaiye — client ko confirmation chala jaata hai.

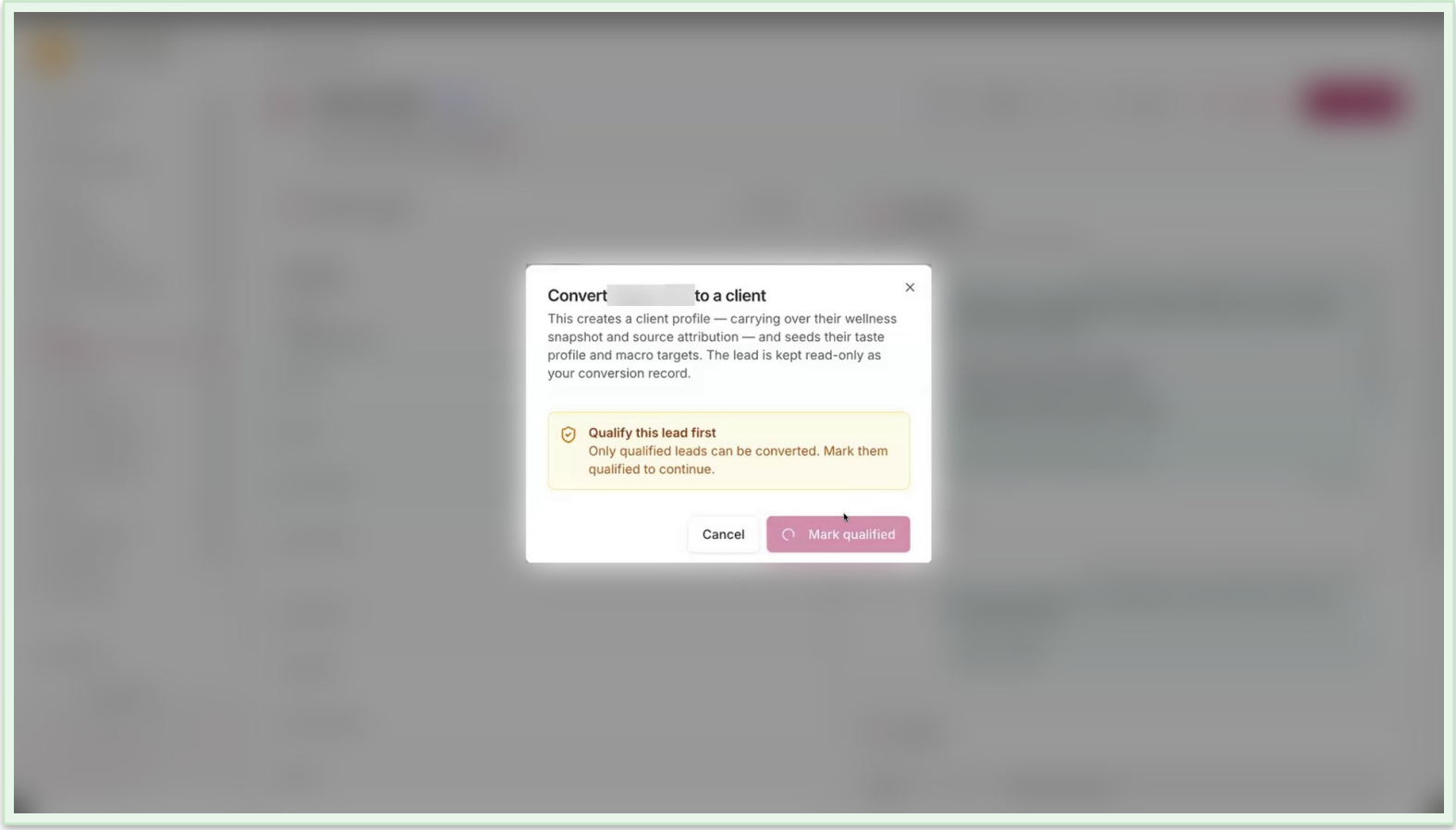


STEP 30

C · LEADS & AUTOMATION

Step 30: Lead ko client banaiye

- Consultation ke baad lead profile kholiye.
- Pehle lead ko Qualify mark kariye — sirf qualified lead convert hoti hai.
- Convert dabaiye: client profile ban jaata hai, lead ki details aur source saath aate hain.

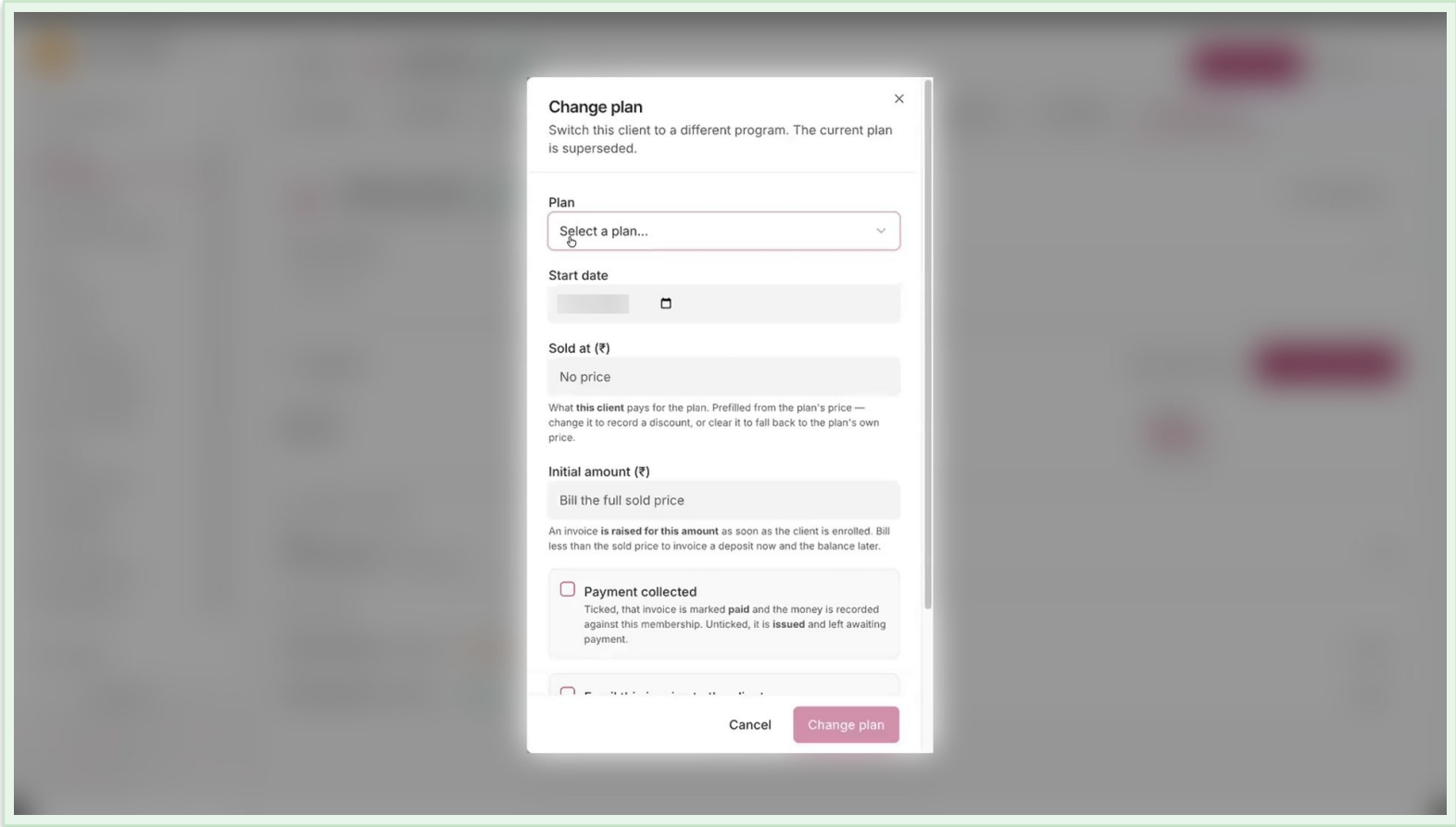


STEP 31

C · LEADS & AUTOMATION

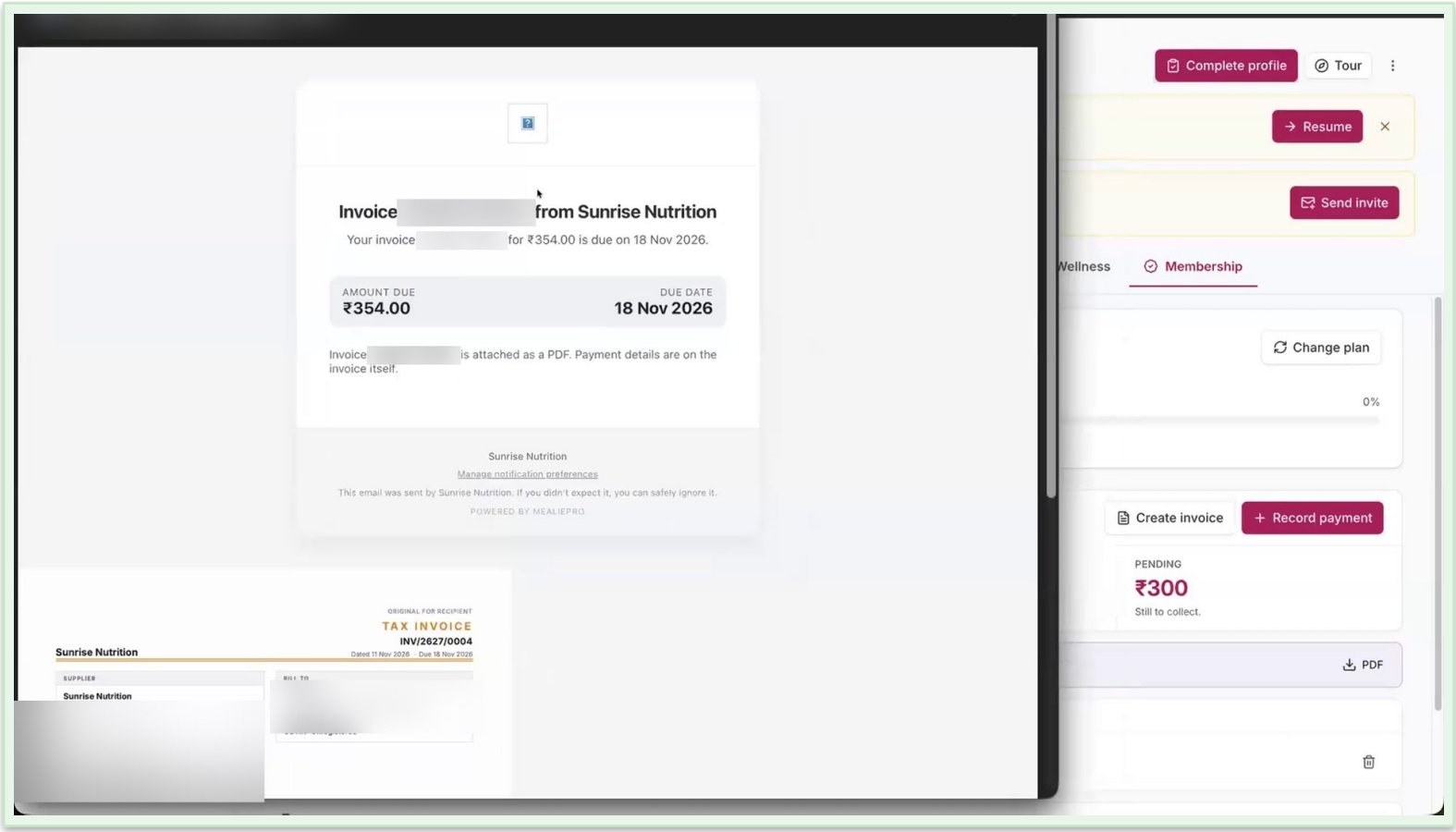
Step 31: Client ko plan dijiye

- Client profile → Assign / Change plan → plan chuniye.
- Start date daaliye; price plan se aata hai — discount ho to badal dijiye.
- Initial amount: poora amount ya pehle deposit.
- “Payment collected” tick = paid; untick = invoice baaki rahega.



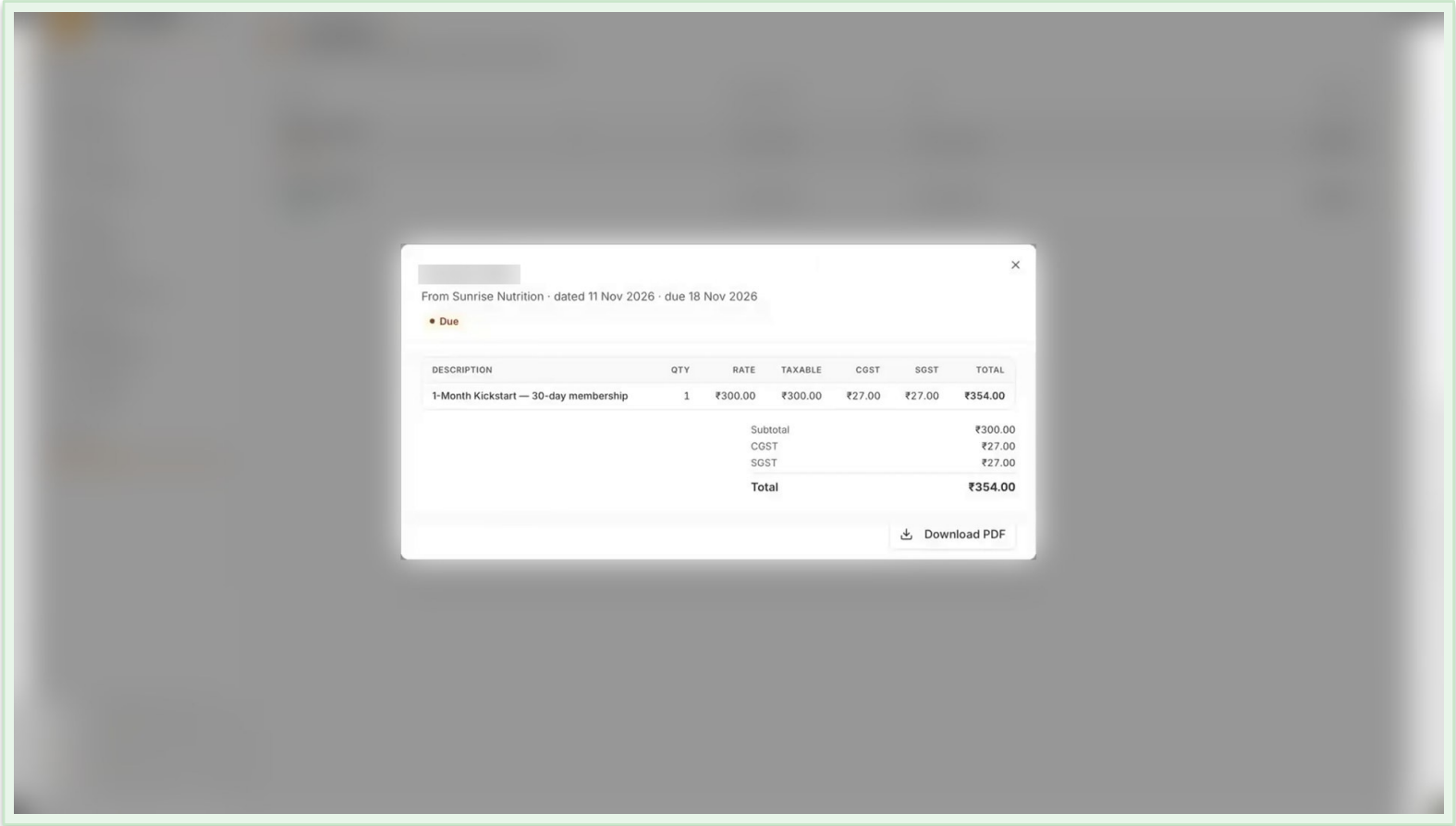
Step 32: Invoice bhejiye

- Plan dete hi invoice ban jaata hai — PDF ke saath email me jaata hai.
- Due date aur status (Pending / Paid) dikhta hai.
- Payment aane par “Record payment” se darj kariye.
- GST aur non-GST dono invoice ban sakte hain.



Step 33: Client ka view: invoice aur payment

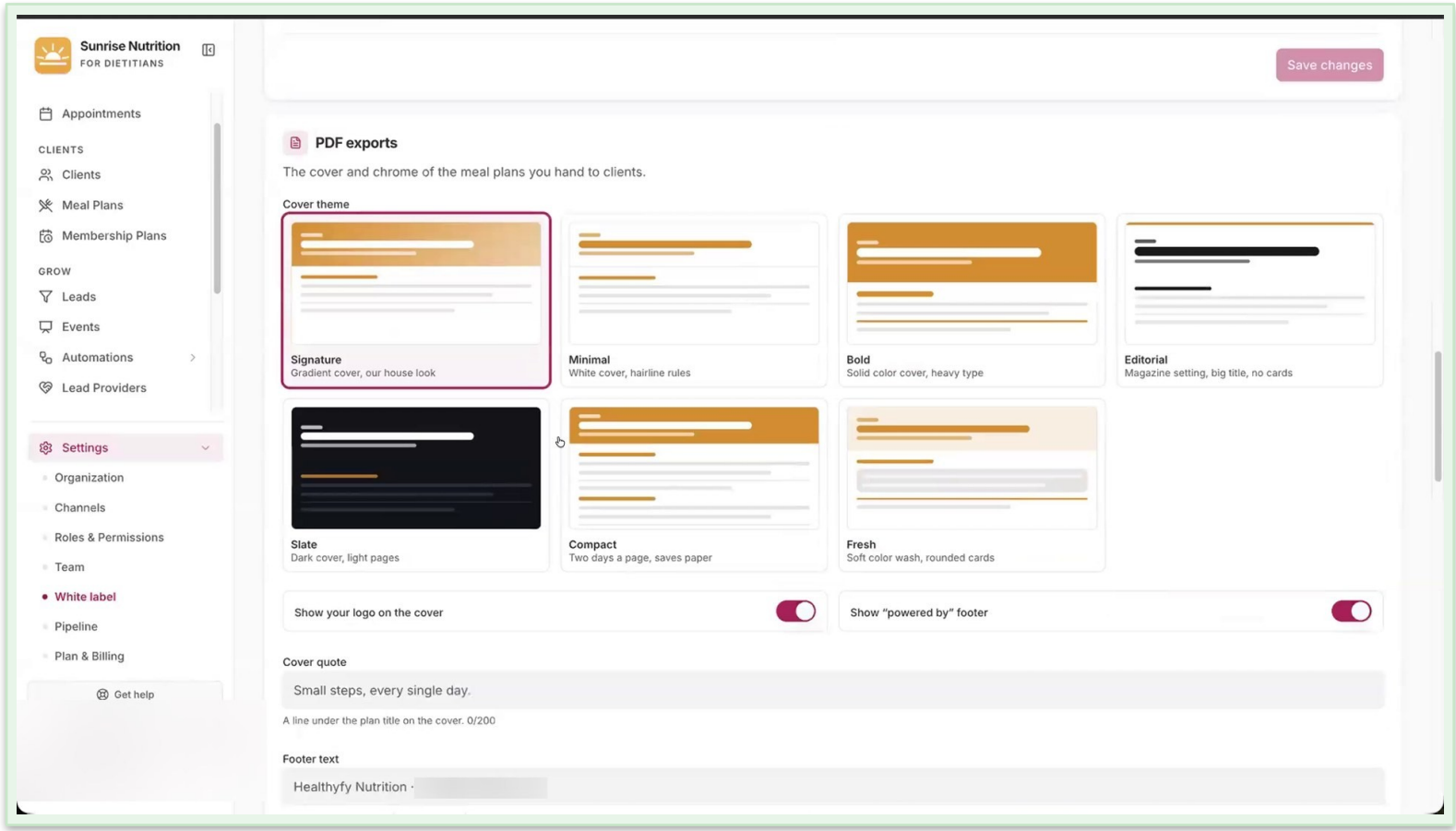
- Client apne login (web ya client app) me Payments me due invoice dekhta hai.
- Wahan se PDF download kar sakta hai.
- PDF par aapka UPI QR code bhi aa sakta hai — client seedha pay kare.



STEP 34 D · LAST (OPTIONAL)

Step 34: White label (optional — sabke paas nahi)

- Ye add-on sabke account me nahi hota — ho to hi set kariye.
- Settings → White label: login screen, emails aur PDF exports apne brand colour me.
- Meal plan PDF ka cover theme chuniye, apna logo lagaiye.
- “Powered by” footer hata sakte hain.



Recap: aapki checklist

- [ ] Invite link se password set karke login kiya
- [ ] Business details aur UPI / payment set kiya
- [ ] Appointment ke liye apna time block (slots) banaya
- [ ] Membership plans aur courses banaye
- [ ] Meal plan templates ready kiye
- [ ] Pehla client add karke invite bheja
- [ ] Lifestyle, medical, lab aur measurements bhare
- [ ] Diet type aur taste profile set kiya
- [ ] Meal plan banaya, adjust kiya, assign kiya
- [ ] Wellness program assign kiya
- [ ] Lead source link, lead provider aur pipeline set kiye
- [ ] Landing page publish, chat assistant aur automation ON
- [ ] Appointment approve, lead ko client banaya
- [ ] Plan diya, invoice bheja, payment record kiya
- [ ] (Optional) White label branding set ki