



SalonUltimate Conversion / Implementation Timeline Best Practice

note that this is a **BEST PRACTICE timeline, however it is possible to accommodate shorter timeframes as long as all steps are completed or in place*

2 weeks out

- Y Contact SalonUltimate to confirm conversion date for your salon – dl_account_management@bookedby.com
- Y Submit your completed Company Information Form sent via email or [click here](#)
- Y Receive SalonUltimate conversion/upgrade email with the following links and information
 - o Hardware Setup and upgrades
 - o Onboarding Pre/Post Conversion Checklist
 - o **Company Information** Document
 - o Contact SalonUltimate support team (855-466-9332, option 2) to have Salon Ultimate support team install remote access software to prep for database retrieval on conversion date
- Y Submit your company/account information to WorldPay for merchant account setup, contact Alex DeGrazio- alex.degrazio@fisglobal.com
- Y Receive your Order Form and ACH from Salon Ultimate via SignNow. Complete and sign
 - o *This is critical to confirm your conversion date*

1 week out

- Y **Confirm receipt of all hardware**
- Y **Confirm receipt of WorldPay Dealer Letter and credit card terminal**
- Y **Have received and SIGNED the SalonUltimate Order form**
- Y **Have a confirmed Conversion / GoLive date from SalonUltimate**

2 Days prior to Conversion

- Y Confirm owner and/or point of contact (POC) for conversion night **AND** GoLive day manager have attended at least 1 Just 4 Him Onboarding Prep Webinar
- Y Confirm owner, manager and staff have watched the Store Operations Onboarding Video highlighting basic functionality of SalonUltimate
- Y Confirm owner and POC for GoLive day have watched SalonUltimate Main System Settings Video
- Y Confirm owner and manager have watched the Manager Functions Video
- Y Have your Pre-Conversion Checklist items completed as listed on the Onboarding Document

- Print out of promotions codes/discounts
- Print out of employees and schedules
- Print out a list of Service Prices (you will need to confirm and/or update your service prices on conversion)
- *Recommended* to have a hard copy of the Onboarding Guide printed out for reference
- Υ Plug in and turn on new computer hardware
 - *Ensure ALL Windows updates have run and are completely installed*
- Υ Call Salon Ultimate support (855-466-9332, option 2) to add all new computers or tablet kiosks that will be installed to remote access

Day of Conversion prior to close of business

- Υ Ensure both your existing and new computer (if applicable) stay ON
- Υ Ensure POC will be available
- Υ After close of business SalonUltimate support team will monitor and be ready to start conversion as scheduled (30 min after closing hours)
- Υ On store closing and after drawer is counted and closed in existing POS system – timeline of conversion, install and setup proceeds as below

Time frame	Task	Length of task
15 - 30 min after closing	SalonUltimate will connect remotely to existing POS computer and retrieve copy of the database for conversion	10 – 20 min* dependent on database size and speed of internet
45 min – 1.5 hours from closing	SalonUltimate to call store and confirm DB has been captured and old computer can be removed and new one can be put in it's place	30 min – 1 hour
	If it has not been completed yet, kiosk enclosure & kiosk can also be installed at this time	15 – 30 min
1.5 – 2 hours from closing	Data is converted and SalonUltimate is ready for install starting with the POS (main computer) SalonUltimate to connect remotely	45 min – 1 hour
2 hours from closing	SalonUltimate to install on kiosk	30 min
2.5 hours from closing	SalonUltimate to call store and give direction to POC to connect credit card terminal to POS computer and proceed with credit card integration setup	20 – 30 min
2.75 – 3 hours from closing	Installation of SalonUltimate is complete and POC may proceed with Onboarding Setup of items above	1 – 1.5 hours
5 hours from closing	Onboarding settings are complete and store is ready to open for business the next day	

Tips & Tricks for Success

- Y Print out Onboarding Setup Guide and make notes as you watch the videos
- Y Commit to conversion with the following mindset:
 - o Convert to SalonUltimate and make little to NO changes in your current operations on Day 1
 - o Owner and/or manager – work with your Onboarding Specialist to schedule training for necessary tasks based on the next date of need (i.e. I am converting on a Monday and need to submit payroll by Friday. Training should be scheduled Tuesday or Wednesday):
 - Payroll Setup
 - Purchase Order Creation
 - Physical Inventory
 - o Start to implement new improved features 2-3 days **AFTER** your conversion. This way you don't overwhelm yourself or staff with lots of changes right away and it allows you to ease into new, exciting enhancements that are now available to you.
 - **THINK!!!** You don't buy all new furniture and paint every room in a new house before you move in...you live there a little and then adopt changes 🏠
- Y Communicate to your guests PRIOR to conversion. Let them know exciting new updates and booking links are coming! They will be more patient and understanding AND look forward to the updates with you!
- Y Invest the time to prepare! A few hours of preparation, can save you many hours of frustration.
 - o **INVOLVE** your team – they use the system every day. Employees and teams that are informed have proven to have smooth, successful conversions! When prepared with what is coming, they will feel and be ready.
- Y You are still booking appointments, checking people in and ringing out transactions with discounts. Everyday tasks are simple and straight forward.
 - o The learning curve comes with learning where the feature is located in the menu or what the 'new' name of the report is that you are use to pulling.
 - o **REMEMBER!!!** Most of us went from flip phones to smart phones at one time and now we could not imagine using anything else!
- Y **LiveChat** (available on desktop and webend) is your new friend! A support agent is available quickly and can efficiently answer your question, most of the time without the guest knowing that you needed to ask!
 - o Use LiveChat as your first resource!