



Onboarding Set up Guide

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Pre-Conversion Checklist

- 1) Have a complete list of employees
 - a. First Name, Last Name and Email address (this will allow for smoother entry of users if all employees are not present on 'GoLive' day)
 - b. Plan what user role you will assign them to:
i.e., Manager, Stylist, Key Holder etc.
- 2) Print a service price list for reference (may or may not need based on conversion)
- 3) Print a list of Promotions/Coupons you use for easy activation
 - a. Code (owner and location specific codes must use number range 2000 – 2999) and/or UPC number
 - b. Start and expiration dates
 - c. Services and/or products they apply to
- 4) Have a complete copy of employee schedules available for entry
- 5) Have your WorldPay Dealer Letter in hand to confirm the Merchant ID and location address match when prompted by support. This will be done during your merchant account setup

Salon Ultimate Onboarding Post-Conversion / Install Checklist

Initial set-up **MUST** be completed on the desktop platform, although the majority of items can be accomplished utilizing the webend.

(D) = Desktop

(W) = Webend

- Main System Settings / Configuration****
 - (D) Main System Settings (Menu→File→Settings) use attached manual as a guide of best practice selections
- Enter Employee Schedules and Enable Services****
 - (W or D) Employee Schedule (Menu→Salon Setup→Employee Maintenance, Edit Employee, Schedule tab)
 - Based on conversion you may need to terminate employees that have been converted from your software program that no longer works in your store
 - Important to note that static schedules should be entered under Employee Maintenance - Schedule and dynamic schedule that can change, should be entered under the Daily Function – Weekly Schedule
 - (W or D) Services Tab under each Employee (Enable all for services)
- Enter Users for all Employees****
 - (W or D) Security Users (Menu→Security→Manage Users)
 - Add a user for each employee (a password reset will be sent to their email address)
- Confirm Service Prices for all services**
 - (W or D) Service Maintenance (Menu→Salon Setup→Service Maintenance)
 - Click Unlock at top to update pricing for each service
- Enter all Promotion Codes and Coupons****
 - (W) Promotion Codes (Menu→Marketing→Promotion Codes) ***
 - Enter from webend, Central Office
 - Enter codes specific to the installed store. Previously entered codes entered in Central Office will be available on install
- Enter Appointment Confirmation and Online Booking Options**
 - (W or D) Confirmations and Emails (Menu→Online Features→Web Options)
 - (W or D) Enable services and employees for Online Booking (Online Appointment Booking Tab)
- Enroll employee Fingerprints as Employees come in (if using fingerprint scanners)**
 - (D) (Menu→Security→Enroll Fingerprints)
- Enter Employee Payroll Information**
 - (W or D) Payroll Set-up (Menu→Payroll→Payroll Setup)

***1st store set-up only – will be avail for subsequent stores to use

****must be done prior to opening to ensure ease of transition**

SalonUltimate Behind the Scenes

Turn on BookedBy Online Booking – link to be sent to owner once Online Booking set-up has been confirmed and completed. This will be the day following conversion. Target goal is to deliver via email by 12pm in your time zone.

Main System Settings

(D) Main System Settings (Menu→File→Settings)

*****NOTE*** All screen shots for Main System settings show the brand standards that are recommended based on your franchise business model. Please enable and follow exactly as pictured (with the exception of a few settings that are noted with call outs that are applicable to your specific location or state).**

Click through each tab and then click 'Done' at the end.

Company Info

- Company name - This will be shown to customers as your business name across your SalonUltimate system
- Short Name - This will be shown as the name of this location in all employee-facing screens (reports, inventory management, etc.) within SalonUltimate.
- Store Number - A numerical identifier for this location. Must be unique across all locations if in a multi-store deployment.
- Address and Contact Info - This will be used as the address and phone number for this location across your SalonUltimate system, including customer-facing pages. This address is vital to the location of your pin on the BookedBy online booking platform. **Fax number is optional

Company Info | Schedule | P-O-S | Clients | Email | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Company Information

Company Name: Salon Ultimate Demo

Short Name: Salon Ultimate Demo 1 | Store Number: 1

Address

Street: 100 Main St

City: Boston

State: MA | Zip: 02135

Contact

Phone: 555-555-5555 | Fax: - -

Schedule**

Note this tab is in process of being migrated to Salon Setup → Schedule Maintenance

- Weekly Schedule – Hours of operation of the salon
- Schedule Exceptions (adjustments to store hours – i.e., closed for a holiday, closing early, or opening late) Schedules that affect entire salon
- Require users to verify today' schedule before opening the day: Yes
 - This will ensure the most accurate staff schedule to ensure BookedBy check in accuracy
- Break Time entered to calculate wait time accurately for when an employee clocks out for a break (assumes they will be returning and will give appropriate wait based on return)

Day of week	Schedule 1		Schedule 2		Daily Total
	Start	End	Start	End	
Sunday	11:00 AM	4:00 PM	-	-	5h 00m
Monday	9:00 AM	10:00 PM	-	-	13h 00m
Tuesday	9:00 AM	9:00 PM	-	-	12h 00m
Wednesday	10:00 AM	9:00 PM	-	-	11h 00m
Thursday	8:00 AM	9:00 PM	-	-	13h 00m
Friday	10:00 AM	8:00 PM	-	-	10h 00m
Saturday	8:00 AM	7:00 PM	-	-	11h 00m

Require users to verify today's schedule before opening the day: Yes No

For wait time calculation, insert standard break time duration in minutes (blank means will not return):

[Client Schedule](#)

Done

*NOTE: When updating the weekly schedule – it will also change historically

POS

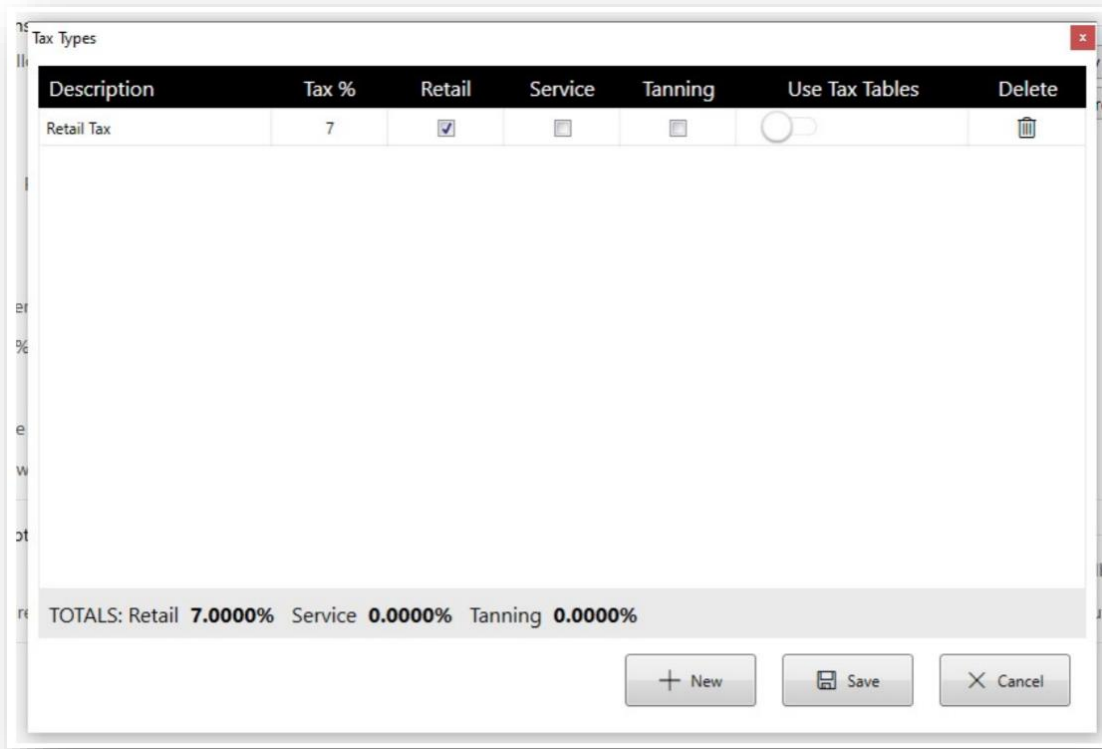
1. Retail tax
 - Service tax (this is unusual, but some states do tax services)
2. Upgrade Tax Formatting (only use if you have multiple taxes to enter – i.e. state, city, locality tax)
3. Gift Certificate Expiration (99 if your state does not allow expirations)
4. Track tips – when set to Yes, sales screen and the kiosk will have the “Enter Tips” prompt enabled

The screenshot shows the configuration window for the POS system. The 'Tax Info' section includes fields for Retail Tax (6.25), Service Tax (0), and Tanning Tax (0). The 'Input Options' section contains numerous dropdown menus and checkboxes for various settings. The 'Cash Out Options' section includes settings for rebook questions, product returns, and tracking requests and tips.

Section	Setting	Value
Tax Info	Retail Tax	6.25
Tax Info	Service Tax	0
Tax Info	Tanning Tax	0
Input Options	Allow price changes and discounts through P-O-S:	Both Allowed
Input Options	Walk-in client is allowed to purchase:	Retail Only
Input Options	Allow price change of zero-price items:	Yes
Input Options	Force the address to be input for missing address clients:	Not Required
Input Options	Allow price change to higher prices:	Yes
Input Options	Show Decline address button:	Yes
Input Options	Require reason for price changes and discounts:	Yes
Input Options	Force the email to be input for missing email clients:	No
Input Options	Preload employee on retail side of P-O-S:	Yes
Input Options	Force sale to be completed when total is obtained:	No
Input Options	Preload employee on service side of P-O-S:	Yes
Input Options	Force color formula input on cash out:	No
Input Options	Count a service and visit even if no money was exchanged:	Yes
Input Options	Verify gift certificates:	Yes
Input Options	Retail % of sales, use service sales instead of total sales:	No
Input Options	Default gift certificate expiration (years):	99
Input Options	Use receptionist code:	Yes
Input Options	Do not allow gift certificate price changes:	Yes
Input Options	Use service price history to determine current price:	No
Input Options	Allow use of House employee for service sales:	Yes
Input Options	Allow local new clients to use new client promotions:	Yes
Input Options	Prefill retail with House employee:	No
Input Options	Display expired promotions in the Sales Screen:	No
Cash Out Options	Ask rebook question:	No
Cash Out Options	Track requests:	Yes
Cash Out Options	Compute Total Automatically:	Yes
Cash Out Options	Require reason for product returns:	Yes
Cash Out Options	Track tips:	Yes
Cash Out Options	Turn to client queue after cashout:	No
Cash Out Options	Lock requested field at the POS:	No

Upgrade Tax Formatting / View Taxes

- Option to enter multiple tax rates if needed or the use of tax tables



Clients

- Standard settings – no changes should have to be updated here
- Referral Program (enter 'today's date upon install) as the start date of your referral program for use to track client referrals
- Tracking client gender and age will ask additional questions during check in at the kiosk
- Note: Cancellation Policy can only be prompted if a WebCheckout / Ecomm merchant account has been setup (see Web Options→Web Checkout Options)

The screenshot shows the 'Clients' settings page with the following configurations:

- Client Options:**
 - Clients are base after: 2 visits
 - Delete clients after: 240 weeks of absence
 - Clients are inactive after: 26 weeks of absence
 - Clients preferred service provider changes after: 3 visits with new service provider
 - Scan Club Card on Client Queue: No
 - Auto-assign loyalty numbers: No
 - Only auto-assign for clients with a valid email: No
 - Client search behavior: Show clients from all stores
 - Client chat behavior: Pop up incoming chats
 - Referral program start date: 07/01/2018
 - Require client gender: No
 - Track client age: No
- Client Referrals:**
 - Client referral types: (Empty list)
 - Force client to specify referral type: No
- Cancellation Policy:**
 - Cancellation Policy: Never charge for cancellation
 - Prompt to charge for no-shows: No
 - Default cancellation charge: 0.00 %
 - Default no-show charge: 0.00 %
 - Require card on file to book all appointments: No

Email

- Store Email name and email address
 - SalonUltimate is NOT an email management platform, rather this will route responses to your existing email account that is entered here
- 'Ask First' to Email Receipts is recommended – this in turn enables a prompt for employees and clients to choose this feature after each completed sale

Company Info | Schedule | P-O-S | Clients | **Email** | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Email Options

Sender Name:

Promotional Email Reply Address: Replies from clients to emails sent by the promotional mailing system will be sent to this email address.

Confirmation Email Reply Address: Replies from clients to appointment confirmation emails and online appointment book emails will be sent to this email address.

Receipt Email Reply Address: Replies from clients to receipt emails and system emails will be sent to this email address.

Internal Email Reply Address: Replies to internal emails sent by Salon & Spa Ultimate to salon staff will be sent to this email address.

Receipt Promo Message:

Email receipts: Never Always Ask First

Add review link to email receipts:

Email Alerts

Admin Email:

Email admin when the first employee punches in:

Email admin when the last employee punches out:

Hardware (Receipt Printer)

- Print Receipts – ‘Never’ is recommended (it will be possible to print a copy if a customer chooses)
- Select your Receipt Printer from the list

**Note:* The SalonUltimate support staff will assist you with margins and font size if your receipt needs adjustment

The screenshot shows the 'Receipt Printer' configuration window. At the top, there is a navigation bar with tabs: Company Info, Schedule, P-O-S, Clients, Email, Hardware (selected), Payment Types, Appt., Queue, Payroll, Security, Purchase Orders, Misc, Misc 2, and Loyalty. Below this, there are sub-tabs: Receipt Printer (selected), Cash Drawer, and Phone System. The main content area contains the following settings:

- Print receipts for each transaction: Never Always Ask First
- Top of receipt: [Empty text box]
- Bottom of receipt: [Empty text box]
- Select Printer: [Dropdown menu]
- Printer Font: **Lucida Console** (dropdown) Font Size: **11** (input)
- Left Margin (inches): **0** (input) Top Margin (inches): **0** (input)
- Always print merchant copy of receipt: **No** (dropdown) Number of blank lines at the end: **0** (input)
- Print receipt top and bottom on merchant copy: **No** (dropdown) Show salon contact info on receipts: **Yes** (dropdown)
- Add review link to printed receipts: **Yes** (dropdown) Show upcoming appointments on receipts: **Yes** (dropdown)
- Print an extra merchant copy for credit card sales: **No** (dropdown)

A 'Test Print' button is located at the bottom right of the configuration area.

Hardware (Cash Drawer)

- Receipt printer and cash drawer model specific.
Well known supported brands include: Epson, Star and POSx

Company Info | Schedule | P-O-S | Clients | Email | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Receipt Printer | Cash Drawer | Phone System

Select how the cash drawer is connected: Not Installed Receipt Printer By Receipt Printer With Command By USB (M-S Cash Drawer) By USB (APG Cash Drawer)

Always open drawer:

Enter receipt printer command codes:

Note - this is only required if using 'By Receipt Printer With Command'

Enable cash drawer security log:

Note - Restart required after changing the setting.

Receipt printer model command codes.
(Support team can help with these if needed)

**Phone System Hardware tab is a legacy tab and no longer supported*

Payment Types

- Integrated credit card processing will be configured with the help of the Support team on the day of the installation.
- Please have your WorldPay dealer letter on hand and ready to enter your merchant deployment ID and confirm store information.

Company Info | Schedule | P-O-S | Clients | Email | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Edit Payment Accounts

Use integrated credit card processing: Yes ▾
Check payment available: No ▾

Hide Pay With Cash on Guided Checkout: No ▾
Use integrated gift card processing: No ▾

Credit Card Processing Settings

Select Processor: triPOS - Worldpay ▾
Acceptor/Merchant ID:
Account ID:
Account Token:
Display Message: Welcome
Device Name: Ingenico Lane/3000 ▾
PIN Pad COM port #: 10
Add tip line: No ▾
Do not allow charge amount to exceed total: No ▾
Do not allow user to change credit card totals under balance cash drawer: No ▾
Enable signature pad: No ▾
Use connected POS terminal for payment (set on kiosk): No ▾
Allow debit only cards: Yes ▾
Enable store and forward (offline processing): No ▾
Total offline processing limit: \$1,000.00
Per-transaction offline limit: \$150.00

Show/Hide Hidden fields

Done

Appointment (Appt)

- Standard settings – no changes should have to be updated here
- Ensure the Restrict booking box is checked and is set to 0 to enforce same day appointments ONLY

The screenshot shows the 'Appointment Book' settings window. The 'Restrict booking to' option is checked and set to 0 days in advance, highlighted with a red box. Other settings include:

- Appointment Book Font Size: Large
- Appointment Book Column Width: Large
- Prompt to print work-tickets for same-day appointments: No
- Use compact work-tickets for same-day appointments: No
- Use the new compact appointment form: Yes
- Restrict service provider view to: Today Only
- Print appointment cards: Never
- Select Printer: [Dropdown]
- Enable booking of first-available appointments: Yes
- Always use primary provider when booking: No
- Show providers after booking new appointment: No
- Keep service information for 'Schedule and Book Another': Yes
- Show Sales: Net Sales
- Show Sales (Lite Version): Net Sales
- Show Productivity: Yes
- Show Productivity (Lite Version): Yes
- High-contrast off colors for the appointment book: No

Queue

- Enable work-ticket printing in client queue to 'Servicing'
- Select your Receipt Printer from the list
- Track reason for no-show/walkout – click 'Configure Reasons' to enter the reasons for the Walkout.
 - *Note – it is suggested to add Training, Duplicate Client & Emergency as options
- Confirmation List – choose default option desired (Email, SMS or Email AND SMS)
 - *Note - SMS is an additional cost and requires request to Support to set-up (see Order Form)

Company Info	Schedule	P-O-S	Clients	Email	Hardware	Payment Types	Appt.	Queue	Payroll	Security	Purchase Orders	Misc	Misc 2	Loyalty
Client Queue														
Prompt for missing e-mail in client queue: <input type="text" value="No"/>					Time before appointment is moved to client queue: <input type="text" value="60"/>									
Enable work-ticket printing in client queue: <input type="text" value="Servicing"/>					Only print work-tickets for color services: <input type="text" value="No"/>									
Select Printer: <input type="text" value="POS-X Thermal Printer"/>					Use compact work-tickets in client queue: <input type="text" value="Yes"/>									
Work Ticket Scale: <input type="text" value="1"/>					Use full client form for queue and appt. book: <input type="text" value="No"/>									
Track reason for no-show/walk-out: <input type="text" value="Yes"/> <input type="button" value="Configure Reasons"/>					Automatically assign service providers for first available: <input type="text" value="Yes"/>									
Allow clients to be removed from the queue: <input type="text" value="Yes"/>					Only show clocked-in employees in client queue: <input type="text" value="No"/>									
Allow use of 'other' reason: <input type="text" value="Yes"/>					Allow service provider to perform services on multiple clients simultaneously: <input type="text" value="Yes"/>									
					Use base service price for first available appointments: <input type="text" value="No"/>									
					Use base service price for first available walk-ins: <input type="text" value="No"/>									
					Prompt to merge duplicate clients: <input type="text" value="Yes"/>									
					Show walk-ins in the appointment book: <input type="text" value="Yes"/>									
Confirmation List														
Default sort order for confirmation list: <input type="text" value="Time"/>					Clients with the 'Default' confirmation preference receive: <input type="text" value="Email and SMS"/>									

Payroll

- Employee tips payment mode: **Your selection will directly affect your cash drawer balancing*
 - If you allow stylists to take cash out of the drawer same day for all tips processed through the POS– choose Pay All Tips Daily
 - If you allow stylists to take their cash and check tips processed through the POS, but pay credit card tips on their payroll checks – choose Pay Cash/Check daily, Credit at Payroll
 - If the stylists do not get tips daily and all recorded tips are paid at Payroll – choose Pay All Tips at Payroll
- 1) Note options regarding paid breaks and overtime (as applicable to your state)
- Weekly healthcare cost is part of the legacy features and is no longer supported

Company Info | Schedule | P-O-S | Clients | Email | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Payroll Settings

Require employees to sign-off on tips: Do Not Require

Period start date for requiring signatures:

Employee tips payment mode: Pay All Tips at Payroll

When a transaction is paid with both credit and cash/check: Tips are counted as credit tips first

Count break as paid time: No

Add a break of minutes, if the total time worked is at least hours

After hours worked, if a break was not taken, prompt the user if they want to take a break for minutes

Automatically close time cards that are punched out for a break: Yes

Time clock printed schedule start day: Sunday

1 Pay time-and-a-half for overtime: Never

Always count sundays as overtime: No

Use new client deduction: No

Use return client deduction: No

Use new request deduction: No

Use return request deduction: No

Weekly healthcare cost: \$0.00

Use payroll tax: No

Payroll tax percentage: 0.00 %

Pay commission on items paid for or discounted by loyalty: No

Security

- Void / Change transactions related settings (based on owner preference)
- Log Users Out After 'x' min of inactivity.
 - If you have a dedicated front desk – recommended is 15 min
 - If stylists check out customers and book appointments – recommended 1 min
 - Fingerprint settings if using a fingerprint device for log ins

Company Info	Schedule	P-O-S	Clients	Email	Hardware	Payment Types	Appt.	Queue	Payroll	Security	Purchase Orders	Misc	Misc 2	Loyalty
Maximum allowed cash refund per transaction: <input type="text" value="\$0.01"/> (0 means no maximum)														
Allow void/change of transactions that are up to: <input type="text" value="0"/> days old (0 means only today's transactions can be changed)														
Service sales in View Daily Sales shows: <input type="text" value="Gross, Net, and Cost Deduction"/>														
Prevent activity unless employees clock-in: <input type="text" value="Yes"/>														
Log Users Out After: <input type="text" value="1"/> minutes														
Clear the selected receptionist when a user logs out: <input type="text" value="Yes"/>							Send 'All Terminal' messages to Lite Version terminals: <input type="text" value="No"/>							
Always use the logged in user as the receptionist: <input type="text" value="Yes"/>							Lite Version terminals can receive messages on punch-in: <input type="text" value="Yes"/>							
Hide menu items that the current user cannot access: <input type="text" value="Yes"/>							Allow cashed out appointments to be modified: <input type="text" value="No"/>							
Hide reports that the current user cannot access: <input type="text" value="Yes"/>							Require description for entering a paid out: <input type="text" value="Yes"/>							
Require all time cards to be closed at end of day: <input type="text" value="No"/>							Use fingerprint access: <input type="text" value="Yes"/>							
Enable webcam security log: <input type="text" value="No"/>							Require fingerprint login if available: <input type="text" value="No"/>							
Disable adjusting service deduction per-employee: <input type="text" value="No"/>							Force employee to enter tips when finishing work: <input type="text" value="No"/>							
Hide client details in client search: <input type="text" value="No"/>														
<input type="checkbox"/> Employees may only clock in and out <input type="text" value="0"/> times per day														

Purchase Orders

- Entries are specific to store based on how you wish to generate Purchase Orders
 - By replacing quantity sold
 - By utilizing Order When below for each item in Inventory Maintenance
 - By viewing sales trends and ordering by performance for replenishment

Client Maintenance System Configurati

Company Info Schedule P-O-S Clients Email Hardware Payment Types Appt. Queue Payroll Security Purchase Orders Misc Misc 2 Loyalty

Purchase Orders

Number of weeks to determine avg. weekly usage: 6

Pre-fill 'need now' when creating purchase orders: Yes

Only show products that need to be ordered: Yes

By default, show qty sold in last: 30 days

By default, use qty sold to determine products to order: No

Always use default values when creating a PO: Yes

Group purchase orders by product line: Yes

Group purchase orders by product class: No

Automatically set received qty when receiving purchase orders: Yes

Sort purchase orders by: Product Code

Use if you are creating POs on replenishment/trend Along with Order below Weeks field in Inventory Maintenance (per item)

Use if you are creating POs based on replacing qty sold

Use if you want to assume all items ordered have been shipped. Adjustments to receiving would be made through Inventory Adjustments

Done

Misc

- Choose pre-selected service for common walk-in services (you will still be able to edit in client queue)
 - *Note: You MUST enter a pre-selected service to populate the estimated wait time in the bottom left of the client queue
- Clean-up time per-client in the queue is also used to factor in additional time to the wait time calculation, after each service the stylists perform.
 - Clean up time would be 'How long does it take to get a station ready for the next client?' This is added to ALL services/clients in terms of wait time calculation

Company Info | Schedule | P-O-S | Clients | Email | Hardware | Payment Types | Appt. | Queue | Payroll | Security | Purchase Orders | Misc | Misc 2 | Loyalty

Label Printing
Product label size: 4-across | Mailing label size: 3-across

Gift Card Format
Track start marker: | Track end marker: |

Other
Check for updates automatically: Yes
Show employee name on view sales: Yes
Include gift card sales in total sales on view sales: No
Print balance report to receipt printer: No
Display a prompt if the cash drawer is over or short: Yes
Require a member card # when selling memberships: No
Close open shifts automatically at end-of-day: Yes
Pre-selected service for walk-in: Full Service Cut
Pre-selected service for new walk-in: Full Service Cut
Valet service: [None]
Add service charge to tickets with services: [None]
Select automatic senior discount: [No Senior Discount]
Clean-up time per-client in the queue: 5 minutes
Show alternative employee metrics for the queue: No
Use service charge for select categories: No
Compact mode: No
Prompt for add-ons when checking in and out clients: Yes

Themes and appearance
Logo Image: Upload Image

Misc 2

- Toggle 'Optimize sales screen to touch screens' to Yes if you have a touch screen monitor
- Tip options for Kiosk screen
 - Recommended to choose \$ amounts for prompting for your brand as stated
- Choosing the Guided Check out Kiosk
- Edit Wait Time Notification triggers and Stylist Ready for Client messages
 - Wait Time is based on integers entered
 - Stylist Ready for Client is on demand based on button from Waiting side of Queue

The screenshot displays the 'Misc 2' configuration window in the SalonUltimate software. The window is divided into several sections:

- Formulas and Notes:**
 - Available Formula Types: Hair
 - Default Formula type: Hair
 - Print to ticket: Formulas
 - Formula Types to print: Color, Perm, Skin, Nail, Mass...
 - Note Types to print: All
 - Print upcoming appointments: No
 - Use Touch-Friendly menu: Yes
 - Show client address on work tickets: No
 - On Account payment is available: Yes
- Kiosk and Touchscreen:**
 - Sales screen type: New Touch Ver.
 - Kiosk transactions use: Regular Shift
 - Tip options for kiosk are: Dollar Amounts
 - For each additional guest, increase tips by: 100.00 %
 - First tip option: \$ 5.00
 - Second tip option: \$ 7.00
 - Third tip option: \$ 10.00
 - Associate with kiosk for guided check-out: DESKTOP-BRTD4R
 - For tickets w/ multiple service providers, split tips: By service price
 - Disable Checkout on Kiosk: No
- Client Queue:**
 - In the queue, select services by category: Yes
 - Send SMS wait time notifications: Yes
 - Notification message contents: Hello from SalonUltimate Demo Store! This is a notification that your wait time is less than %wait%. Please come inside, we look forward to starting your service. (Includes 'Restore Default Message' button)
 - Stylist ready message contents: Hello from SalonUltimate Salon! This is a notification that your stylist is now ready. Please come into the salon. (Includes 'Restore Default Message' button)
 - Notify clients by SMS when wait time drops below: 5 minutes
 - To be notified, initial wait time must be at least: 30 minutes
 - Special text options: %store% - the name of your salo, %wait% - 5 minutes

Loyalty

- No action needed, not applicable to your brand

Company Info	Schedule	P-O-S	Clients	Email	Hardware	Payment Types	Appt.	Queue	Payroll	Security	Purchase Orders	Misc	Misc 2	Loyalty
What kind of loyalty rewards do you want to offer? <input type="text" value="Offer Free Services or Products (classical)"/>														
Allow loyalty points partial redemption: <input type="text" value="No"/>														
How should loyalty points be earned? <input type="text" value="Detailed earning setup for services and products (classica"/>														

Enter/Edit Employee Schedules and Enable Services

(W) Menu → Salon Setup → Employee Maintenance

Click 'New Employee' to add new employee or highlight existing employee and 'Edit' to adjust existing converted employee

Code	Name	Last Name	Contact Phone	Hired On	Birthday	Position	Services Performed	Primary User	In Appt Book	Book Online	Include in Payroll	Count in Productivity
BR102	Chantal	Smith		11/12/2019	04/12/1988	Stylist	Some	<input checked="" type="checkbox"/>	YES	YES	YES	NO
BR169	Chris	Smith		01/30/2018	07/07/1980	Stylist	Some	<input checked="" type="checkbox"/>	YES	YES	YES	YES
BR167	Crystal	Smith		12/16/2017	05/01/1996	Stylist	Some	<input checked="" type="checkbox"/>	YES	NO	YES	NO
JC	Jada	Coyne		07/17/2019		-	Some	<input checked="" type="checkbox"/>	NO	NO	NO	NO
BR142	Megan	Smith		06/24/2015	07/16/1987	Stylist	Some	<input checked="" type="checkbox"/>	YES	YES	YES	YES
123	Missy	Smith		01/14/2019		-	Some	<input type="checkbox"/>	YES	YES	YES	YES
BR107	Morgan	Smith		12/08/2008	09/19/1988	Team Lead	Some	<input checked="" type="checkbox"/>	YES	YES	YES	YES
876	Rachel	Smith				Stylist	Some	<input checked="" type="checkbox"/>	YES	YES	YES	YES
sv	Sergey	Vinogradov		09/19/2019		-	Some	<input checked="" type="checkbox"/>	NO	NO	NO	YES
B1234B	Tara	Smith		09/20/2018		Stylist	Some	<input checked="" type="checkbox"/>	YES	YES	YES	YES

Edit Employee View

Details

- Employee ID (suggested: can use a payroll ID # or initials)
- Alias (the name that will show on the Wallboard, Kiosk or Online Booking)
- Email – HIGHLY RECOMMENDED TO ENTER (will be used in User Set-up)

DK Dejan K
dejan.kukic@bookedby.com

- Details
- Employment
- Schedule
- Services
- Retail Commission
- Online Profile
- Goals Setup
- Goals Report
- Photo
- Licenses
- Tips
- Reviews
- Surveys

Name

First Name: Dejan

Last Name: K

Middle Initials:

Alias: Kuki

Employee ID: 1994

Contact

Home: - -

Cell: 555-555-5555

Email: dejan.kukic@bookedby.com

Emergency

Contact Person:

Relation:

Phone: - -

Address

Street:

City:

State:

Zip:

Miscellaneous

Gender: Male

Date of Birth: / /

SSN: - -

Marital Status: Single

Notes

Notes:

Save **Cancel**

Employment

- Misc Settings as standard below for stylists and those needing to be visible for BookedBy Online Booking
 - Booking Message Preference – sends an email or SMS message to the employee each and every time an appointment or cancellation is booked for them
 - Include in Appointment Book – employee will have a column in the appointment book and be able to be booked for services
 - Book Online – allow employee to show for BookedBy Online Booking
 - Use for First Available – allows employee to be selected for First Available Options for BookedBy and in salon booking or check in options (typically 'No' for owners and dedicated receptionists)
 - Receptionist – employee will be able to ring up sales transactions and perform daily salon/sale functions (stylists who ring transactions and owners WILL need to be toggled on for this)
 - Count in Productivity – counts employee metrics in salon productivity numbers (typically 'No' for owners)
 - Include in Payroll – includes employee in the Calculate Gross Pay Payroll metrics (typically 'No' for owners)

The screenshot shows the 'Miscellaneous' settings for an employee named Dejan K. The interface is divided into several sections:

- Review:** Contains fields for 'Date of Hire' (10/29/2021), 'Next review', 'Last review', and a 'Terminated' toggle switch.
- Position:** Includes dropdown menus for 'Company', 'Group', and 'Position', each with a 'Modify List' button. It also has toggle switches for 'Independent Contractor' and 'Use Levels' (with a 'Level' input field).
- Display Color:** A dropdown menu showing a color swatch and the hex code #FFA4C00.
- Miscellaneous:** A panel with several toggle switches and a dropdown menu:
 - 'Booking Msg. Preference' is set to 'None'.
 - 'Include in Appt. Book' is toggled ON.
 - 'Book Online' is toggled ON.
 - 'Use for First Available' is toggled ON.
 - 'Receptionist' is toggled ON.
 - 'Count in Productivity' is toggled ON.
 - 'Include in Payroll' is toggled ON.

At the bottom right, there are 'Save' and 'Cancel' buttons.

Schedule

If your employee's schedule is consistent and static based on the days of the week with minimal changes, enter schedule here. If it is changing based on specific dates and needs of the business see Dynamic Schedule Changes.

If using a Dynamic Schedule it is recommended to select 'Off' for Start and End of Schedule

Day of week	Schedule 1		Schedule 2		Daily Total
	Start	End	Start	End	
Sunday	Off	Off	-	-	0m
Monday	9:00 AM	5:00 PM	-	-	8h 00m
Tuesday	9:00 AM	9:00 PM	-	-	12h 00m
Wednesday	9:00 AM	9:00 PM	-	-	12h 00m
Thursday	9:00 AM	5:00 PM	-	-	8h 00m
Friday	9:00 AM	5:00 PM	-	-	8h 00m
Saturday	Off	Off	-	-	0m

Schedule Exceptions tab

- For Dynamic shifts and exceptions:

DK Dejan K
dejan.k@bookedby.com

- Details
- Employment
- Schedule
- Services
- Retail Commission
- Online Profile
- Goals Setup
- Goals Report
- Photo
- Licenses
- Tips
- Reviews
- Surveys

Weekly Schedule | **Schedule Exceptions** | Paid Days Off

+ New | Edit | Delete | Out Sick

Date(s)	Hours	Comment
01/31/2022 - 01/31/2022	0m	Out Sick

Save | Cancel

Or use Menu→Daily Functions→Weekly Schedule on the desktop OR (Menu→Payroll→Weekly Schedule on the webend) to create weekly schedules or make minor adjustments to the schedule by week. Choose the date of the week to start, highlight the employee's name and choose 'View/Modify' to adjust the schedule.

If your employee schedules are dynamic and change week to week, enter your schedule in this manner here.

Week

*Actual hours worked in red

Week Start: 10/14/2018 Stylist P2

Print

Weekly Schedule

Employee	Sun - 10/14	Mon - 10/15	Tue - 10/16	Wed - 10/17	Thu - 10/18	Fri - 10/19	Sat - 10/20	Total Hours
Cora Smith	9:00A to 6:00P 0 hour 0 min	10:00A to 6:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	Off 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	Off	42 hours 0 min 26 hours 0 min
Dee Smith	9:00A to 6:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	Off 0 hour 0 min	Off 0 hour 0 min	Off	34 hours 0 min 9 hours 0 min
Jenn Smith	Off 0 hour 0 min	Off 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	11:00A to 8:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	43 hours 0 min 26 hours 0 min
Kate Smith	Off 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	10:00A to 6:00P 0 hour 0 min	12:00P to 8:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	9:00A to 6:00P 0 hour 0 min	50 hours 0 min 26 hours 0 min
Katy Smith	Off 0 hour 0 min	Off 0 hour 0 min	Off 0 hour 0 min	Off 0 hour 0 min	Off 0 hour 0 min	Off 0 hour 0 min	Off	0 hour 0 min 0 hour 0 min

View/Modify

Cancel

Services

- Enable Services for each employee that performs services
- Individual service price and service time may be entered here as well

Select the services which can be performed by this employee.

Perform Service	Length	Book in between	Gap time	After	Price	Cost	Commission
<input checked="" type="checkbox"/> Service category Color (2 services)							
<input checked="" type="checkbox"/> Full Weave	<input type="checkbox"/> 2h 50m	<input type="checkbox"/> Yes	2h 00m	45m	<input type="checkbox"/> \$55.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Wall Feave	<input type="checkbox"/> 2h 50m	<input type="checkbox"/> Yes	2h 00m	40m	<input type="checkbox"/> \$80.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Service category Cut (2 services)							
<input checked="" type="checkbox"/> Women's Cut	<input type="checkbox"/> 30m	<input type="checkbox"/> No	0m	0m	<input type="checkbox"/> \$50.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Women's cut and blow dry	<input type="checkbox"/> 30m	<input type="checkbox"/> No	0m	0m	<input type="checkbox"/> \$50.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Service category Haircut (2 services)							
<input type="checkbox"/> Hairwash	<input type="checkbox"/> 5m	<input type="checkbox"/> No	0m	0m	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Men's Haircut	<input type="checkbox"/> 30m	<input type="checkbox"/> No	0m	0m	<input type="checkbox"/> \$40.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default
<input checked="" type="checkbox"/> Service category None (1 service)							
<input checked="" type="checkbox"/> Single Process Color	<input type="checkbox"/> 30m	<input type="checkbox"/> No	0m	0m	<input type="checkbox"/> \$50.00	<input type="checkbox"/> \$ 0.00	<input type="checkbox"/> Default

Buttons: Select All, Deselect All, Print, Save, Cancel

Security Users

(W) (Menu→Security→Manage Users) (for deployments with 1 store)

- Click 'Add'

The screenshot displays the 'Users' management interface. At the top, there are several action buttons: 'Add', 'Edit', 'Delete', 'Set Password', and 'Assign Security Card'. Below these buttons is a search bar with a 'Search' button and a 'Show All' dropdown menu. The main part of the interface is a table with the following columns: 'Username', 'Employee', 'Role', and 'Locations'. The table contains 11 rows of user data.

Username▲	Employee	Role	Locations
beststylist6@gmail.com	Rachel Smith	Stylist - with POS a	Store 1 Dell
chantal@email.com	Chantal Smith	Admin	Store 1 Dell
chris@mail.com	Chris Smith	Receptionist	Store 1 Dell
ivan	Ivan Matyunin	Admin	Store 1 Dell
jada	Jada Coyne	Admin	Store 1 Dell
jada.coyne@salonultimate.com		Admin	Store 1 Dell
jenny		Stylist	Store 1 Dell
jenny@email.com		Call Center	Store 1 Dell
mary@email.com		Call Center	Store 1 Dell
missy@email.com	Missy Smith	Stylist	Store 1 Dell
tara@email.com	Tara Smith	Admin	Store 1 Dell

- Choose Employee from drop down

- Enter password (minimum of 5 characters) – *this will just be a placeholder password*
 - A password reset will automatically be sent to the email on file after saving, this will allow the user to save their own password that they will remember and alleviate having to communicate the password you entered.
- Choose Role (you may grant access equal or lesser than your own)
- Choose Remote Access
 - None = access in salon, no access to webend
 - Full = access in salon, access to webend, access to POS mobile app
 - Mobile/Provider Only = access in salon, access to Scorecard App
- Check the store(s) that the user will need access to. If it is a user that will need access to the webend and consolidated info (Central Office) you must check 'No Region' to enable all locations including Corporate Inventory

Employee Maintenance part 2 (for deployments with multiple stores)

In webend Menu → Salon Setup → Employee Maintenance (under Central Office)

- Look for duplicate names/employees
- Click on first duplicate, go to Stores tab, and see what stores are selected
- Go to the second duplicate, go to Stores tab, and see what stores are selected

Employee Maintenance

Code	First name	Last name	Home Phone	Address	Email
MM...	Jade	Smith			maria.medino@salonultimate.com
AP123	Jessica	Smith			
JPO	John	Bryant			john.bryant@bookedby.com
JPM	John	M			john.marzano@bookedby.com
JR123	John	Ralph			
4991	Kejan	Dukic			
2020	Krcko	Granulic			
LG08	Lucas Grayson	Rivera			
LK	Luka	Baros			
02	Mandy	Lang			StylistMandy@gmail.com
22258	Mandy	Lang			StylistMandy@gmail.com
MK...	Margaret	Klein			marp@email.com
234...	maria	Medino			
342...	Mariam	P			
1	Milos	Popovic	512-321-6732		milos@yahoo.co.uk
1234	Missy	Smith			missy@email.com
60	Nancy	Stayton			carla.tomanek@bookedby.com
NE	New	Employee			
202...	Novi	Stalita			
PB	Paul Kenneth	Bulinas			
007	Petar	Stankovic			
01	P	Riviera			novi.riviera@bookedby.com

EXAMPLE Code '02' Mandy – employee in 3 stores

The screenshot shows the 'Details' tab of an employee profile for 'Mandy'. The form is divided into several sections:

- Name:** ID: 02, First: Mandy, Middle: (empty), Last: Lang, Alias: Mand.
- Address:** Street, City, State, Zip (all empty).
- Contact:** Home, Cell, E-mail: StylistMandy@gmail.com.
- Emergency:** Contact, Relation, Phone (all empty).
- Info:** Gender: Female, Birthday, SSN, Marital Status: Single.

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

The screenshot shows the 'Stores' tab of the employee profile. It displays a section titled 'Employee Active in Locations' with a list of stores and checkboxes:

- No Region
- Corporate Inventory
- Store 1 Dall
- Store 2 Ho
- Store Ivan TX

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

Code 22258 Mandy -employee in 1 store

The screenshot shows the 'Details' tab for employee Mandy (ID 22258). The form is divided into several sections: Name (ID: 22258, First: Mandy, Last: Lang), Address (Street, City, State, Zip), Contact (Home, Cell, E-mail: StylistMandy@gmail.com), Emergency (Contact, Relation, Phone), and Info (Gender: Female, Birthday, SSN, Marital Status: Single). The 'Stores' tab is active, showing a list of stores with 'Store 2 Pro' selected.

The screenshot shows the 'Stores' tab in the employee details form. It displays a list of stores with checkboxes for 'No Region', 'Corporate Inventory', 'Store 1 Dell', 'Store 2 Pro', and 'Store Ivan TX'. 'Store 2 Pro' is checked, indicating that the employee is active in that location.

- Update the employee code of the employee with the least number of stores to match the employee with the most stores (EXAMPLE above, in webend toggle to individual store Salon 2 Pro and update Mandy's code to '02')
- This will combine Mandy into 1 employee without compromising reporting or conflicting as a duplicate

On the (installed version) continue with direction above for single stores on the Details, Employment and Services tabs.

Manage Users Part 2 (For deployments with more than one store or on second stores)

In webend Menu → Security → Manage Users (under Central Office)

If a user already exists, highlight click edit and enable additional location for user to work.

If a user needs to be added, click add, choose the employee from drop down and select stores that employee will work in.

Add User

User Information

Employee: [No Employee] ▼

First Name:

Last Name:

Email enabled: Catch-all email recipient:

Email key:

Role: Admin ▼

Allow Remote Access: None ▼

Email:

Password:

Confirm Password:

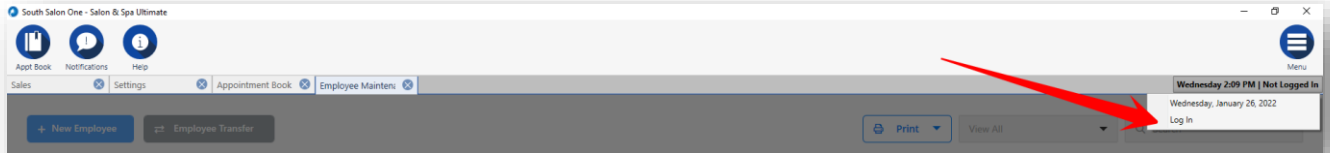
User Access to Locations

Store
<input type="checkbox"/> No Region
<input type="checkbox"/> Store 1 Dell
<input type="checkbox"/> Corporate Inventor
<input type="checkbox"/> Store 2 Pro
<input type="checkbox"/> Store Ivan TX

Save Cancel

Enroll Employee Fingerprints

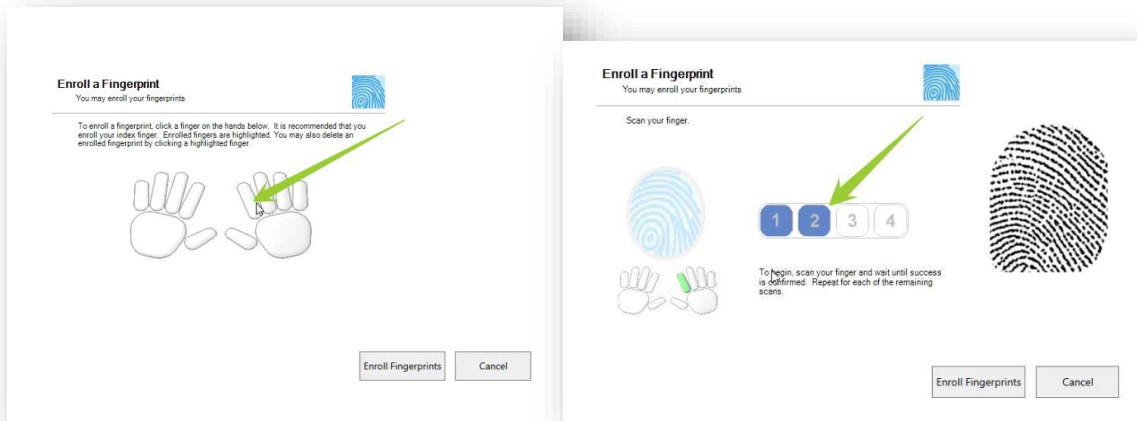
(D) Go to Log In in upper right corner



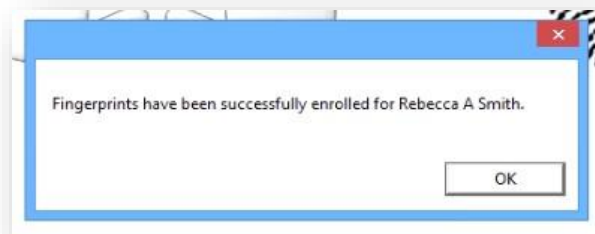
Choose name of Employee needing to enroll fingerprints, when employee's name is in the upper right go to:

Menu→File→Security→Enroll Fingerprints

- Choose the finger(s) you wish to enroll – you will need to enroll at least 2
- Touch the fingerprint scanner to record the fingerprint, the number will highlight in blue when a fingerprint has been successfully recorded



- After recording at least 2 fingerprints you will get a prompt that fingerprints have been successfully enrolled



Promotion Codes

(W) (Central Office → Menu → Marketing → Promotion Codes)

Enter in Central Office to make all subsequent stores available for your promotions and discounts.

If this an additional store to your deployment:

Make sure promotion codes are Active

Code	Description	Stores/Region	Start	Expiration	State
5678	Complete Pkg	Fantastic Sams	6/11/2018	6/11/2019	Active(1) Inactive(0)
FDT	Father's Day test	Fantastic Sams	6/11/2018	6/11/2019	Active(1) Inactive(0)

New View/Modify Delete Print

Click New to add promotion/coupon code and services and/or products to the promotion:

- Enter Promotions and Discounts with applicable services and/or products they apply to
- Usage Type:
 - Sales Screen (most common and allows to ring up in sales screen)
 - Mailings & Surveys (used for Promotions attached to email Campaigns)
- **Promotion Code: Owners MUST choose a code within the number range 2000 – 2999. This is reserved for owner and location specific promotion codes.**
- UPC field is optional to support the ability of scanning promotion codes sent out through mailers, flyers, etc.
- Commission Type: How you will pay employees who are assigned to the item receiving a discount
- Promotion Type: Toggles % or \$ off

Edit Promotion

Promotion Data | **Restrictions** | Scope

Description: Unlimited Usage

Usage Type: Sales Screen Minimum Purchase: \$ Only applies to selected items in transaction

Promotion Code: Not valid with other promotions Automatically apply promotion

UPC Code: Only apply to first items and services purchased

Commission Type: Discounted Price Only usable by new clients

Promotion Type: Products and Services - % Off Add loyalty points of when promotion is redeemed

Service Discounts

Services Discounted

60 Minutes
Adult Haircut
Assistant Tip
Balayage
Beard Detail
Bikini Wax
Blowdry and Styling
Childs Cut 12U
Color

→
←

Add All Clear List

0 % Off

Retail Discounts

Products Discounted

5 V/R - Color
AC Alternator
AC Daily Shampoo Liter
AC Firm Hold Gel
AC Form Cream 3 oz
All-In-One Face Balm Broad
Chi Argan Cond 25 oz
Chi Argan Mask
Chi Argan Oil 3oz

→
←

Add All Clear List

0 % Off

Save Cancel

- Restrictions tab will give you Start and Expiration dates:
- Ability to drill to specific day and also time

Edit Promotion
 Promotion Data | Restrictions | Scope
 Start Date: 01/29/2017 Expiration Date: 01/29/2018
 Availability: Everyone
 Restrict by day Restrict by time

- Ability to specify per employee is available at the Store Level and will display a list of employees (providers) that the promotion code can be used with (i.e. Chantal performs a Hair Cut and there is a specific promotion code for her Hair Cuts – only if she is checked under these restrictions may this promotion code be used.) *This does not have to do with the receptionist that rings up the promotion code.*

Edit Promotion
 Promotion Data | Restrictions | Scope
 Start Date: 02/01/2018 Expiration Date: 02/19/2022
 Availability: Everyone
 Restrict by day Restrict by employee Restrict by time

- Jada Coyne
- Chantal Smith
- Chris Smith
- Crystal Smith
- Megan Smith
- Missy Smith
- Morgan Smith
- Rachel Smith
- Tara Smith

- Scope tab will allow you to choose All Stores, Select Stores or Single Stores:

Edit Promotion
 Promotion Data | Restrictions | Scope
 Scope of this promotion: All stores, All stores, Region, Select stores, Single store

Confirmations and Emails

(W) (Menu→Online Features→Web Options)

- Mailing System Options, Basic Settings tab
 - Enter Store Email (Recommended same for all):

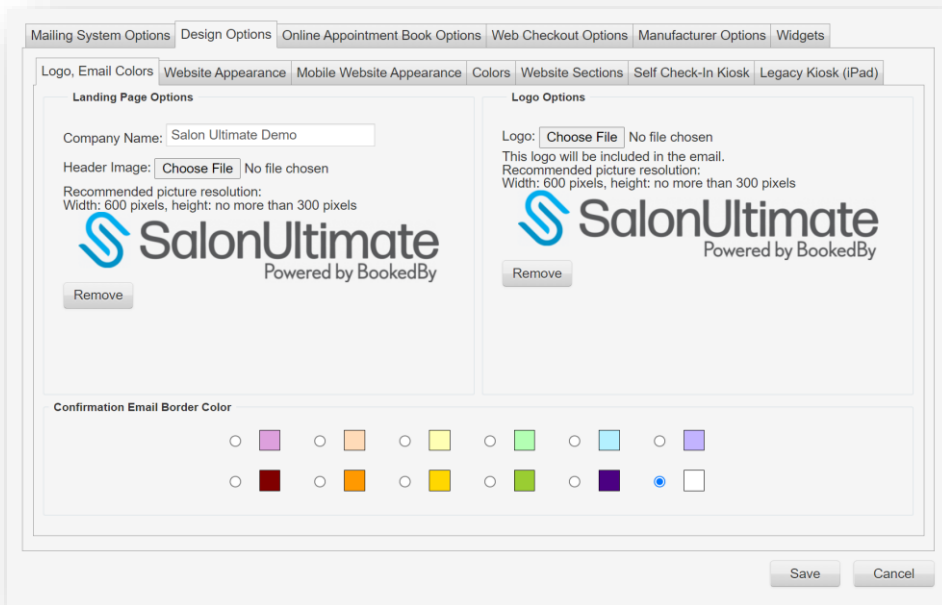
*NOTE: SalonUltimate is not an email management platform, these settings direct replies to communications to your existing email account

The screenshot shows a software interface window titled "Mailing System Options" with several tabs: "Mailing System Options", "Design Options", "Online Appointment Book Options", "Web Checkout Options", "Manufacturer Options", and "Widgets". The "Mailing System Options" tab is active, and within it, the "Basic Settings" sub-tab is selected. The "Basic Settings" sub-tab contains the following fields and descriptions:

Field	Description
Sender Name: Salon Ultimate Demo	
Promotional Email Reply Address: su@demo.com	Replies from clients to emails sent by the promotion mailing system will be sent to this email address.
Confirmation Email Reply Address: su@demo.com	Replies from clients to appointment confirmation email and online appointment book emails will be sent to this email address.
Receipt Email Reply Address: su@demo.com	Replies from clients to receipt emails and system emails will be sent to this email address.
Internal Email Reply Address: su@demo.com	Replies to internal emails sent by Salon & Spa Ultimate to salon staff will be sent to this email address.

At the bottom right of the dialog box, there are "Save" and "Cancel" buttons.

- Design Options Tab (this tab ***MUST*** be completed for appointment confirmation to render and send with appointment and store information):
 - Enter Company Name, upload logo for both options and choose email border color (recommended to choose white if you want no static color selection)



Mailing System Options, Confirmation tab (recommended default settings as pictured):

- Send confirmation emails x days before – the Just 4 Him brand only offers same day appointments therefore, this field can be left blank
- Send reminders should be set to 2 hours before the appointment (this is for same day appointments. – Check ins and waits will still receive wait time notifications)
- Employee related notifications here will work depending on the booking message preference setup under the Employee Profile

The screenshot shows a software interface with a tabbed menu at the top: "Mailing System Options", "Design Options", "Online Appointment Book Options", "Web Checkout Options", "Manufacturer Options", and "Widgets". Below this is a sub-menu with "Basic Settings", "Confirmation", "Promotional", "Surveys", "Upcoming", "Reminders", "Client Schedule", and "Notifications". The "Confirmation" tab is active. The settings are as follows:

- Send confirmation email: 0 days before
- Send calendar invites with confirmations: No
- Show "First Available" instead of employee name when provider is not requested: Yes
- Send reminders: 2 hours before appointment (highlighted with a red box)
- Send reminders and booking notifications between these hours: 8 AM and 9 PM
- Send booking notification to client: Yes
- Send booking notification to employee: No
- Send appt modification notification to client: No
- Send appt modification notification to employee: No
- Confirmation Email Template Type: Salon (selected), Spa, Kids
- Custom Image: Choose File (No file chosen)

At the bottom right, there are "Save" and "Cancel" buttons. A "Recommended picture" label is visible at the bottom of the main content area.

Enable services and employees for Online Booking (Online Appointment Booking Tab – Settings tab):

- Options at bottom of screen are shown in brand standard recommendations
- This setting screen allows for quick selection of offered providers and services
- These settings apply equally to both appointment booking and check in selections for BookedBy

The screenshot shows the 'Online Appointment Book Options' settings tab. It features three main sections: 'Include Providers', 'Include Services', and 'Featured Services'. Each section contains a list of items with checkboxes. Below these sections are 'Options' for booking settings and 'Save'/'Cancel' buttons.

Include Providers:	Include Services:	Featured Services:
<input checked="" type="checkbox"/> Chantal Smith	<input checked="" type="checkbox"/> 60 Minute	<input type="checkbox"/> 60 Minute
<input checked="" type="checkbox"/> Christopher Smith	<input type="checkbox"/> Balayage	<input type="checkbox"/> Balayage
<input checked="" type="checkbox"/> Megan Smith	<input checked="" type="checkbox"/> Beard Detail	<input type="checkbox"/> Beard Detail
<input type="checkbox"/> Meghan Smith	<input checked="" type="checkbox"/> Blowdry and Styling	<input type="checkbox"/> Blowdry and Styling
<input checked="" type="checkbox"/> Melissa Smith	<input type="checkbox"/> Braid	<input type="checkbox"/> Braid
<input checked="" type="checkbox"/> Morgan Smith	<input type="checkbox"/> Color Wow	<input type="checkbox"/> Color Wow
<input checked="" type="checkbox"/> Rachel Smith	<input type="checkbox"/> Complimentary Consultation	<input type="checkbox"/> Complimentary Consultation
<input checked="" type="checkbox"/> Tara Smith	<input type="checkbox"/> Dads Cut	<input type="checkbox"/> Dads Cut
	<input type="checkbox"/> Deep Conditioning Treatment	<input type="checkbox"/> Deep Conditioning Treatment
	<input checked="" type="checkbox"/> Eyebrow Wax	<input type="checkbox"/> Eyebrow Wax
	<input type="checkbox"/> Finish	<input type="checkbox"/> Finish
	<input checked="" type="checkbox"/> Full Service Cut	<input type="checkbox"/> Full Service Cut

Options:
 Allow same day booking Show prices Allow product purchases Require card on file for all services
 Skip appt requests Allow cancellations up to 3 hours in advance Show durations Hide last names

Identity and Branding Tab:

- Enter location name, upload store picture, paste social media links:
**Note – if no social media link is entered, the corresponding social media button / tag in email campaigns will not show*

The screenshot shows a configuration window titled "Identity and Branding" with several tabs: "Settings", "Identity and Branding", and "Timeframe". The "Identity and Branding" tab is active. The window is divided into two main sections: "Identity" and "Branding".

Identity Section:

- Location Name:** A text input field containing "SalonUltimate Demo Store 1".
- Store Photo:** A "Choose File" button and the text "No file chosen".
- Image:** A square image of a storefront with a glass door and two potted plants.
- Resolution:** Text below the image reads: "Recommended picture resolution: Any square image works. Ideal dimensions are 226x226px".
- Remove:** A button below the image.

Branding Section:

- Theme:** A dropdown menu set to "Green".
- Reviews Dashboard:**
 - Client value:** A text input field containing "\$ 0.00".
- Website and Social Media:**
 - Website URL:** A text input field containing "http://salonultimate.com".
 - Facebook URL:** A text input field containing "https://www.facebook.com/SalonL".
 - Twitter URL:** An empty text input field.
 - Google+ URL:** An empty text input field.
 - Yelp URL:** An empty text input field.

At the bottom right of the window are "Save" and "Cancel" buttons.

Timeframe (Standard entries, should not need configuration):

The screenshot shows a configuration window titled 'Timeframe' with several tabs at the top: 'Mailing System Options', 'Design Options', 'Online Appointment Book Options', 'Web Checkout Options', 'Manufacturer Options', and 'Widgets'. The 'Timeframe' tab is selected. Inside the window, there are three sub-tabs: 'Settings', 'Identity and Branding', and 'Timeframe', with 'Timeframe' being the active one. The main content area contains the following options:

- Allow Booking:** For days: Sun Mon Tue Wed Thu Fri Sat
- Appointments can be booked on the following times:
- Restrict booking to the following timeframe: .
-

At the bottom right of the window, there are two buttons: 'Save' and 'Cancel'.

Remaining tabs can be configured but are not critical to Day 1 operations.

Employee Payroll Setup

(W) (Menu→Payroll→Payroll Setup)

Select each an employee from the drop down and then select their pay type as applicable to your salon.

The screenshot shows the 'Employee Payroll Setup' dialog box. It is divided into several sections: 'Employee' (with an empty dropdown), 'Payroll Mode' (with 'Commission type' set to 'By sales totals'), 'Service commission' (with seven rows of 'From: \$ [] and less than \$ [] is [] %'), 'Retail commission' (with seven rows of 'From: \$ [] and less than \$ [] is [] %'), and 'Options'. The 'Options' section includes 'Product cost per client serviced' (\$ 0.00), 'Apply charge' (radio buttons for 'Before calculation' and 'After calculation'), 'Salon charge per week' (\$ 0.00), 'Manager bonus' (Add 0 % of Total Salon Sales), 'Product cost' (radio button), 'Pay type' (radio buttons for 'Hourly wage: \$ 0.00' and 'Weekly salary'), 'No client deductions', and 'Use new california overtime rules'. The 'Method of payment' dropdown is highlighted with a red box and set to 'Hourly'. 'Save' and 'Cancel' buttons are at the bottom right.

Method of Payment allows for Hourly, Commission, Salary as well as and/or methods of calculation.