



# Year-End Checklist

Here are some helpful tips and best practices to close out 2019 and bring in 2020 with a bang!

## To-do's

- Close all open tickets
- Close all open shifts and days
- Close all open inventory adjustments
- Close all open receiving orders
- Print a list of all of your "in process" purchase orders
- Void any old open inventory counts
- Perform an inventory count

## Reports

### Management:

- ✓ Daily Summary Report 01/01/19 - 12/31/19
- ✓ Accounting and Sales Summary select monthly for a year
- ✓ Tax Collections Summary 01/01/19 - 12/31/19

### Inventory:

- ✓ Current Status of Inventory by Category (takes a snapshot of your current inventory)
  - \* Run this before and then right after you perform your year-end physical inventory count
  - \* Run this report at close on your last day of business in 2019
- ✓ Adjustment Summary 01/01/19 - 12/31/19
- ✓ Ticket: Tip Summary 01/01/19 - 12/31/19
- ✓ Staff: Staff Commission Summary 01/01/19 - 12/31/19
- ✓ Productivity: Time Payroll Summary 01/01/19 - 12/31/19

## Best Practices

If you have extra gift sets - don't discount them! You have another holiday right around the corner. Keep as much of the packaging as you can and refresh them for Valentine's Day.

If you are breaking down gift sets and adding the individual items back into your open stock; first, create a new adjustment reason called "breakdown of gift sets". Then, create an adjustment of the gift set OUT and add each of the individual items IN using the new reason.

Remember how busy you've been the past few weeks... imagine if you were that busy all of the time! Using our free online booking feature will help book you solid 24/7.

Make sure your staff has access to SalonBiz Stylist App so that they can book appointments on the go- wherever they are. Don't let anyone complain about any slump in the action, put the power in their hands (literally) to promote themselves and fill their book via their mobile phone!