

UPGRADE CHECKLIST



1. LOGIN

Yay! You did it!

You'll land on your SalonBiz Dashboard

- ☐ Login using your username and password
- ☐ Look around! Click *Online Help* at the top and check out the Help Center if you ever get stuck.



2. CLOCK-IN

Security is the same as before, just enter your pin

- ☐ Clock-in
Authorization Required - Managers determine where you can clock-in.



3. BOOK

Let's go!

- ☐ Switch *Days* *Are they confirmed? Look at the confirmation status in the corner of the appointment*
- ☐ Switch *Views*
Zoom in and out
- ☐ Click the *More Booking Options* tab in the upper left
- ☐ Make a single service appointment
Hit the plus or double-click the book
- ☐ Make a multi-service appointment (eg. cut & wax or color & cut)
Stylists will be immediately notified when an appointment is made, moved, or canceled on today's book
- ☐ Drag and drop!
Move an appointment and alter the duration
- ☐ Block
 - ☐ Block and Unblock
 - ☐ Drag and drop!
Move a block and alter it's duration



4. CLIENTS

Find the *Clients* menu button and search for your favorite client!

- ☐ Check the *Contact* info
- ☐ Check *History*
- ☐ Click to Book FROM the file

Opt-In FTW



5. CHECK-IN

- ☐ Make sure you have an *Open Shift* before checking anyone in
- ☐ Use the drop down menu to check-in

Go to the check-in screen if you accidentally checked someone in. You can return them to the list in a click!



6. CHECK-OUT

- ☐ Find the *Card-on-file* indicator
- ☐ Add a recommendation to the file or ticket (or both!)
- ☐ View *Purchase History*
- ☐ Pre-book the next appointment and view the *Frequency of Visit*

G S P

Know your indicators! If the G is green then your client has a Gift Card balance, S = Series and P = Promo Credit



7. CLOSE

don't forget to count your drawer and close your day