UPGRADE CHECKLIST

SalonBiz®

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*
☐ Switch *Views*
Zoom in and out

Are they confirmed? Look at the confirmation status in the corner of the appointment

☐ 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!

Opt-In FTW

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

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