

# Get to know SalonBiz checklist



Here's a handy self-guided tour, to help you get familiar with the new SalonBiz.

## 1. LOGIN

- Login with your username and password

You'll be taken straight to your SalonBiz Dashboard.



### Getting stuck?

Head to Online Help at the top and check out the Help Center

## 2. CLOCK-IN

- Clock-in

Managers determine where you can clock-in.



### Security is the same as before

Authorization is needed, so just enter your pin

## 3. BOOK

- Switch *Days*
- 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  
E.g. Cut and wax, or color and cut. Stylists will be notified immediately when an appointment is made, moved, or canceled on today's book
- Drag and drop  
Move an appointment or change its duration
- Block
  - Block and unblock
  - Drag and drop  
Move a block or change its duration



### Are they confirmed?

Check the confirmation status in the corner of the appointment

## 4. CLIENTS

Find the Clients menu button and search for your favorite client.

- Check *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



### Accidentally checked someone in?

Go to the check-in screen and return them to the list in just 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 check out the *Frequency of Visit*



### [G][S][P] Know your indicators

Green G = your client has a Gift Card balance  
S = Series  
P = Promo Credit

## 7. CLOSE

Count your drawer, close your day, celebrate your wins!

