

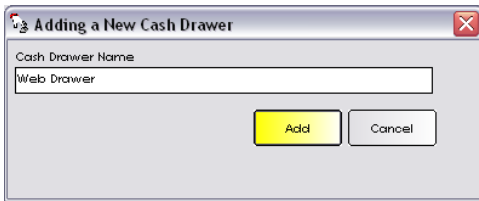


Before configuring your Online Booking settings, let's set up a few things in SalonBiz® to make it most effective.

Create a Web Drawer

This will not be a tangible cash drawer but will serve as a place to organize any transactions you receive online and allow you to open and close this shift like you would for your other workstations.

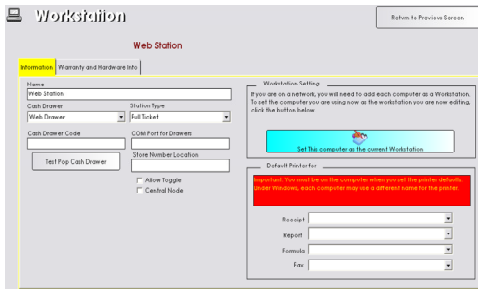
1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Computer System button.
3. In the Table to Edit box, click Cash Drawer, and click the Add button.
4. Type in Web Drawer for the Cash Drawer Name
5. Click the Add button.



Create a Web Station

This will not be a tangible workstation but will be utilized to link to the Web Cash drawer to better organize your online transactions.

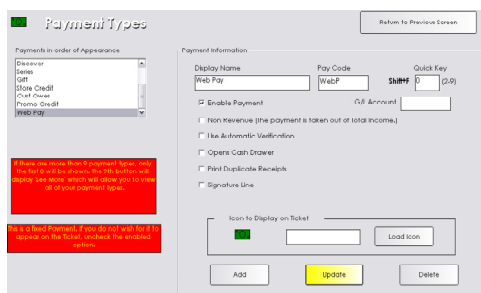
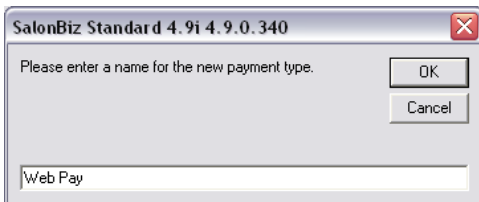
1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Computer System button.
3. In the Table to Edit box, click Workstation, then click the Add button.
4. Type in Web Station in the Workstation Name field and click Add.
5. Select the Web Drawer you just created under the Cash Drawer drop down menu. Then, click the Return to Previous Screen button.



Adding a Payment Type

Creating a new payment type will allow you to easily organize your online transactions.

1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Payment Types button and then click the Add button.
3. Type in the name of your new payment type (Web Pay).
4. Click the OK button and verify the correct Display Name.
5. Type in a pay code in the Pay Code field, for example WebP.
6. Leave the Quick Key code blank (default set to 0).
7. Place a check in the Enable Payment box.
8. Do not place a check in the Non-Revenue box.
9. Do not place a check in the Automatic verification box.
10. Since this payment type is only used and assigned to purchases made online, leave the Opens Cash Drawer box blank.
11. Leave the Print Duplicate Receipts box blank.
12. Leave the Signature Line box blank.
13. You will not need to load an icon for this payment type.
14. You may alter the order of this payment type in the list by clicking and dragging the name in the Payments in order of Appearance box. We recommend moving this payment type to the bottom of your list to prevent it from appearing on the ticket screen.
15. Click the Update button.



Create a Staff File

You will need to create a Web Staff or a “person” responsible for booking the appointments and gift cards sold online.

1. From the SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Staff & Book button.
3. From the Table to Edit box, click on Staff and then
4. Click the Add button.
5. Type in ‘Web Staff’ as the staff member’s first and last name.
6. Type in a staff code, for example WS and then click the Add button.
7. From the Staff Information tab, since this person is purely fictitious you will only need to:
 - Link the Web Staff to a Category (such as Front Desk)
 - Place a check in the box Don’t Print on Productivity Rpt?
8. The information in the Staff Schedule tab, Service List tab, and Payroll tab are not necessary.
9. Click on the Return to Previous Screen button.

Adding a Request Reason

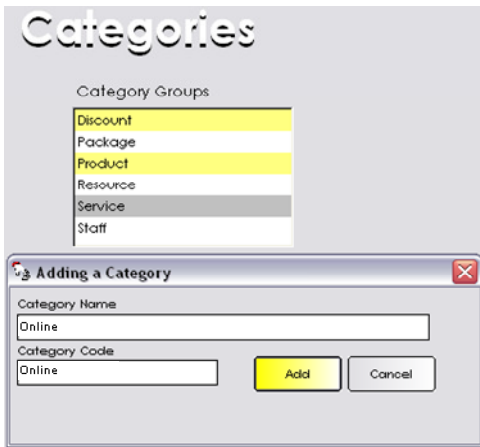
Creating a special request reason will allow you to easily identify those appointments booked online and will also allow you to generate reports by request type.

1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Customer button.
3. From the Table to Edit box, click on Request Reason.
4. Type in Web Request in the Request Name field.
5. Click the Add button.
6. In the Adding a New Request Reason box, type in WR in the Request Code field and then click the Add button.
7. Click on the box of color in the Information tab.
8. Select a request color from the colors available. We recommended selecting a bright color for your Web Request types so that they are easily recognizable on the appointment book.

Creating a Gift Type

Creating a special gift certificate type will allow you to easily identify those gift certificates purchased online and will also allow you to generate a report by gift certificate type.

1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Ticket button.
3. From the Table to Edit box select Gift Certificate.
4. Click on the Add button.
5. Type in Web Gift in the Name field.
6. Click on the Add button.



Shipping Services

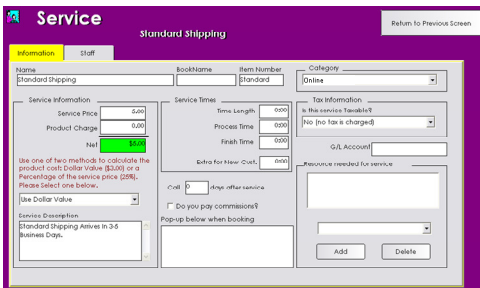
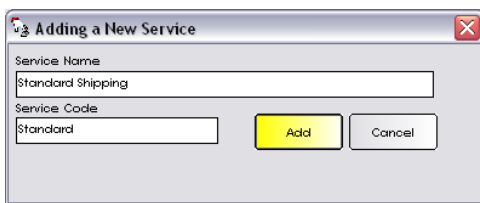
If you plan on offering shipping as an option for gift card sales, you will need to follow these steps to create shipping as a service.

Adding an Online Service Category

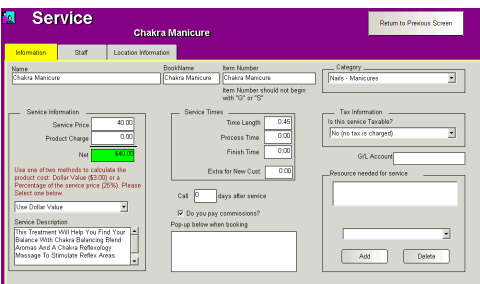
1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click the Category button. In the Category Groups field, highlight by clicking once on Service.
3. Click on the Add button.
4. Type in the Online Service Category Name and code for example, Online. Click on the Add button.

Adding a Shipping Service

You will need to create a separate service for every type of shipping method you plan on offering.



1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click the Service button.
3. In the Table to Edit box, highlight by clicking once on Service.
4. Click on the Add button.
5. Type in the shipping service name and service code in the corresponding fields for example, Standard Shipping for the service name and Standard for the service code.
6. Click the Add button.
7. Enter the shipping service amount in the Service Price field.
8. Type in a description of the service in the Service Description field.
9. In the Category drop down menu, select the newly added Web category from the list.
10. No other service information is necessary for shipping services other than linking the appropriate category and the price.
11. Follow the steps above to add all shipping methods you are planning on offering to your online clients. You may add as many or few shipping services as necessary.



Editing Services

Review your service names and descriptions to be sure they are client-friendly. You will want to edit all service prices, times and descriptions accordingly for the services you plan on offering to clients online.

1. From the SalonBiz® menu bar, click on the Blueprints icon.
2. Click on the Service button.
3. From the Table to Edit box, click on Service.
4. Double click on the service in the list that you need to update, or click once on the service and then click on the Edit button.
5. Update the service information as necessary.
6. Type in a description of the service in the Service Description field for your online clients to learn more about the service during the booking process.
 - ❖ Your clients will be able to view the Service Description but will not be able to view the information in the Pop-up below when booking field.
7. Follow steps 1-6 for all services you are planning to offer online.

