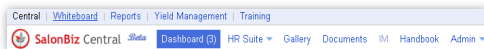


The Whiteboard is designed to focus the team on behaviors that will build their business. Throughout the day, the Whiteboard will automatically update (every 15 minutes) to display results for key metrics. By providing staff their results and goals, you will see improvements on their daily performance. In addition, they can flip their column over to see their schedule for the day – reducing interruptions at the front desk.

Real-time metrics on business drivers = real-time results.



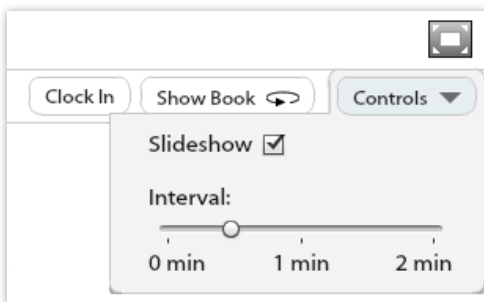
Access

1. Login to Central using the Whiteboard login and password.
 - ❖ Whiteboard has a universal login for each location. This will display the location's Whiteboard in the default view selected by the system Administrator/Manager.

Navigation

Full Screen Mode

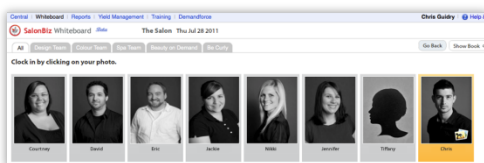
The icon in the upper right corner of the screen can be used to maximize the screen into full screen mode.



Controls

This button controls the slideshow intervals. By default, the system is set to a 30 second slideshow. This enables a transition from one tab to the next every 30 seconds. To disable the slideshow, simply uncheck the checkbox.

- ❖ Tabs are created by the Administrator under Groups in the Admin menu. The Tab order can be changed in the Group Order section.

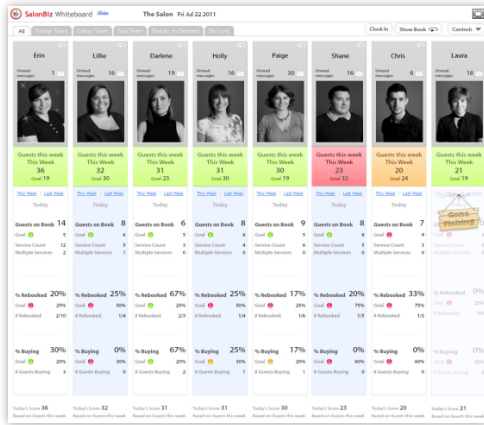


Clock In

Employees are now housed on a separate screen. By default, employees are not required to clock in. However you can change an employee's clock in status in the Employee screen under Central Admin. Employees required to clock in can do so by clicking the Clock In button, then clicking on their name and/or photo, then entering their password.

When an employee is marked as sick or on holiday in the Central calendar, they will appear on the Clock In screen with the sick or holiday icon on their photo.

Day View



Staff

Staff members are displayed on the Whiteboard if they have a schedule in SalonBiz® for the selected location on the current day, or if a ticket for that staff member is processed in the location (this includes the front desk or retail team).

The 'Gone Fishing' sign is displayed when a staff member's schedule has been blocked in location.

- ❖ Staff names are retrieved from SalonBiz®. If a staff has a different name in Central, the staff name from SalonBiz® will override it.

Metrics

Metrics are determined by the channel selected in the Whiteboard Settings area by the Administrator/Manager.

Total Revenue This Week	Total Revenue This Week	Total Revenue This Week	Total Revenue This Week
\$3,074.76	\$2,173.36	\$2,074.63	\$1,821.30
Goal \$1,690.00	Goal \$1,690.00	Goal \$1,746.00	Goal \$4,400.00
This Week Last Week	This Week Last Week	This Week Last Week	This Week Last Week
Today	Today	Today	Today
Service \$480.00	Service \$185.00	Service \$475.00	Service \$90.00
Goal \$300.00	Goal \$396.50	Goal \$640.00	Goal \$2,510.00
Forecast \$605.00	Forecast \$300.00	Forecast \$545.00	Forecast \$190.00

Weekly Metric

The weekly metric is listed at the top of each staff member's column and provides a performance gauge for the week. It is a dynamic number that is continuously updated. Taking the staff member's daily goal and multiplying it by their number of working days that week calculate the weekly goal).

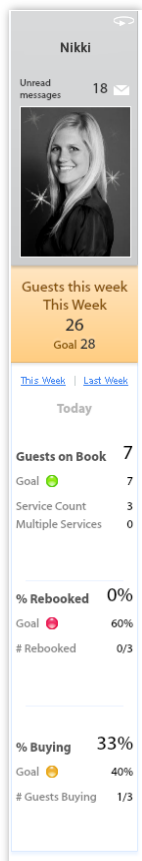
Data

Since the Whiteboard is an in-the-moment gauge of performance, the system displays Today as the default view. You can switch between Today and This Week or Last Week as well.

- ❖ A week is calculated as Sunday through Saturday.

Actuals

A staff member's actual performance is displayed next to each metric label. Their goal is below it and the key indicators that help achieve that metric are listed below the goal.



Ranking

The ranking (left to right) of staff on the Whiteboard is determined by the Administrator/Manager. The system defaults to your weekly metric (either Guests This Week, Service Sales This Week or Service + Retail Sales This week).

Star Performer

Staff members' score is displayed at the bottom of their Whiteboard column. The top performer for each group (tab) is listed on the far left and will sparkle with stars, this is based on the metric chosen for ranking.

Total Revenue This Week \$3,074.76 Goal \$1,690.00	Total Revenue This Week \$2,173.36 Goal \$1,690.00	Total Revenue This Week \$2,074.63 Goal \$1,746.00	Total Revenue This Week \$1,821.30 Goal \$4,400.00
This Week Last Week	This Week Last Week	This Week Last Week	This Week Last Week
Today	Today	Today	Today
Service \$480.00	Service \$185.00	Service \$475.00	Service \$90.00
Goal ⓘ \$300.00	Goal ⓘ \$396.50	Goal ⓘ \$640.00	Goal ⓘ \$2,510.00
Forecast 🟢 \$605.00	Forecast 🔴 \$300.00	Forecast 🟡 \$545.00	Forecast 🔴 \$190.00

Service Goal

Service Goal: \$250.00

Rolling Goal: \$250.00

Working Days Left: 2

Overall Goal: \$375.00

OK

Service \$480.00	Service \$185.00	Service \$475.00
Goal ⓘ \$300.00	Goal ⓘ \$396.50	Goal ⓘ \$640.00
Forecast 🟢 \$605.00	Forecast 🔴 \$300.00	Forecast 🟡 \$545.00

Goals

Goals are created in Central for each staff member. The system looks at the staff member's schedule to see if they are working that day in order to set up goals.

Rolling Goals

Service goals have a built-in rolling goal mechanism so that when a staff member fails to reach their service goal for the day, the amount missed is then considered into a rolling goal calculation. That number is added to the service goal, divided by the number of working days left in the week and presented as a newer, higher service goal. This keeps staff focused on hitting targets so that the business can achieve good overall performance. If rolling goals are being used, there will be an 'i' icon next to the service goal.

A circle of color next to the goal compares performance to the goal.

- Green indicates peak performance (staff has reached their goal)
- Orange indicates average performance (staff is within 20% of their goal)
- Red indicates poor performance

Schedule

Viewing the Schedule

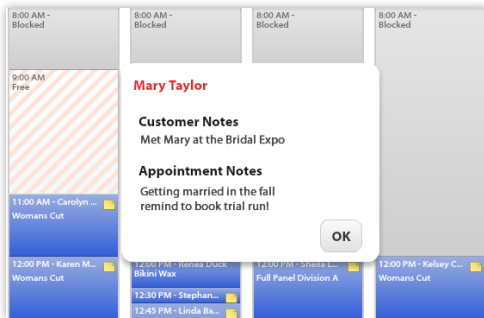
Each team member's schedule is available from the Whiteboard. To access an individual team member's book, click on the Arrow icon at the top of their column to flip to the book view.

The Show Book button will flip the entire Whiteboard (all team members) to the appointment book view.

The colors on the schedule are used to indicate the following:

- Request reasons
 - By default, the Whiteboard displays new clients (those without a previous service ticket processed) in pink and returning clients (those with a previous service ticket processed) in blue. To display your SalonBiz® request reason colors, click the Show Colors button. A Colors Legend button will appear to display the colors associated with each of your request reasons.
 - ❖ If your request type has been deleted in SalonBiz®, then there is no color displayed on the Whiteboard for that request reason.

- Checked in appointments
When appointments are checked in (either through SalonBiz® or the iPad® application), they are displayed in grey on the Whiteboard schedule view. Checked out clients are displayed in black - just like in SalonBiz®.
- ❖ If the staff member is not available for appointments, the Schedule icon is not displayed.



Notes

In the schedule view, a notes icon is displayed on appointments that have either or both an appointment note or customer note in SalonBiz®.

1. From the appointment, click on the notes icon.
2. The note will be displayed.
3. Click the OK button to close the note.



History and Formulas

You can view client history and add notes/formulas on the Whiteboard schedule view.

1. Click on the appointment you wish to view.
2. The client's history screen will be displayed. The Whiteboard references the last 6 months of history and displays the last 3 entries/visits for notes, services and products purchased.
3. Click the Add Formulas button to add a note to the client's file.
4. Select the type of note from the drop down list.
5. Using the on-screen keyboard or your computer keyboard, type in the notes you wish to enter.
6. Click the Save button and the notes will be added to the client's file in SalonBiz®.

Mary Taylor - New Formula

Please enter new formula:

Formula Type: Color

Color Formula

1 2 3 4 5 6 7 8 9 0 ←

q w e r t y u i o p

a s d f g h j k l

↑ z x c v b n m ,.\$#?

Save Cancel