



SalonUltimate Implementation Timeline Best Practice

Knockouts information landing page: <https://bookedby.com/ko-onboarding>

****IDEAL GoLive date is the Monday of a new payroll period****
Communicate with your sales rep if this is different.

2 weeks out

- Contact SalonUltimate to confirm GoLive date for your salon
 - o Email: sales@bookedby.com
- Receive, complete and sign your Order Form and ACH from Salon Ultimate via SignNow
 - o *This is critical to confirm your GoLive date*
- Receive, complete and sign SMS campaign activation via SignNow
 - o There will be 2 numbers provisioned for this: 1 for confirmations, 1 for marketing
- Contact SalonUltimate support team (617-848-4399, option 2) to have Salon Ultimate support team install remote access software on your store computer SalonUltimate software installation
- Contact Fiserv to get your merchant account setup and order your Lane 7000 terminal
 - o Email: daniel.seiler@fiserv.com
- Owner and/or Manager to sign-up and attend at least 1 Knockouts Onboarding Webinar during 2 weeks prior to GoLive (sign up on landing page)

Monday / 1 week out

- SalonUltimate store will be created and installed on your store's computer prior to business opening
- Confirm receipt of Lane 7000 credit card terminal from Fiserv (CardPointe)
- Enter any store specific services into your store **Service Maintenance**
- Enter employees into **Employee Maintenance** (they will all receive an email on creation inviting them to set their password for the system)
- Have stylists watch the Store Operations Video on the Landing page of the onboarding site to get familiar and prepared
- Have manager watch the Manager Functions Video on the Landing page of the onboarding site

Tuesday

- Enter **Employee Schedules** (video tutorial on the Landing page of the onboarding site)
- Enter store specific **Promotion Codes** for services or retail

Wednesday

- Set specific store settings based on recommended **Main System Settings**
- Connect credit card terminal and enter **Credit Card Payment Credentials** for desktop and **Web Payments** (Card on File/Ecomm) settings
- Run test transaction to ensure payment is successful (feel free to reach out to support for setup and test transaction walk through)

Thursday

- Confirm owner, store manager and stylists scheduled for GoLive day have viewed Store Operations Video
- Enter any additional **Inventory** items in **Inventory Maintenance**

Friday

- Enter all **Appointments** from Uzeli in SalonUltimate
- Recommended to enter any appointment

Sunday Night before GoLive

- Turn off Uzeli online booking
- Knockouts marketing team will switch over website booking links
- Knockouts marketing team will Enable BookedBy site

Monday / GoLive

- Arrive 1 hour early to open shift, have employees clock in and familiarize themselves with SalonUltimate
- Recommended to complete a **Physical Count** of Inventory within the week for accurate inventory on hand