SalonUltimate
Powered by BookedBy

SalonUltimate Implementation Timeline Best Practice

SalonUltimate information landing page: https://bookedby.com/su-onboarding

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 a SalonUltimate merchant processing partner to get your merchant account setup and order your credit card terminal
  - o Inquire with your Software Sales Agent to learn about options
- ☐ Owner and/or Manager to review Timeline Best Practice and Plan for GoLive

Monday / 1 week out

- ☐ SalonUltimate store will be created and installed on your store's computer prior to business opening
- ☐ Confirm receipt of your credit card terminal from merchant processor
- ☐ Obtain your user log-in from support (this should be emailed to you on creation of your store)
  - o Reset your password to a memorable 8 character password that you will use when you access the system
  - o Bookmark your SalonUltimate deployment URL for access: {*mysalon*.salonultimate.com/login}
- ☐ Enter your store services into your **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 in your **Main System Settings** (review descriptions on the web portal to help choose the right settings for your business)
- [ ] 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 **Inventory** items in **Inventory Maintenance**

Friday

- [ ] Enter all **Appointments** in SalonUltimate
- [ ] Recommended to enter any appointment captured from this point forward until GoLive in SalonUltimate (if converting from another system)

Sunday Night before GoLive

- [ ] Turn off existing online booking from old system (if applicable)
- [ ] Enable BookedBy site to be live in **BookedBy Setup**

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