# SalonUltimate Implementation Timeline

*Note that this is a **BEST PRACTICE** timeline, however it is possible to accommodate shorter timeframes as long as all steps are completed or in place*

## 8 weeks out

- ☐ Contact SalonUltimate to confirm your GoLive date for your salon
    - ○ am@bookedby.com
- ☐ Receive SalonUltimate / BookedBy resource page link: bookedby.com/sharkeys including:
    - ○ Hardware Requirements
    - ○ THIS Implementation Timeline
    - ○ Company Information Document to set up account
- ☐ Receive, complete and sign your Order Form and ACH from SalonUltimate via SignNow.

### *THIS IS CRITICAL TO CONFIRM YOUR SYSTEM SETUP*

- ☐ Receive, complete and sign SMS campaign activation via SignNow
    - ○ There will be 2 numbers provisioned for this: 1 for confirmations, 1 for marketing
- ☐ Owner and/or Manager must review Training Videos on Resource page to set up the system and allow online booking to be enabled in preparation for your Grand Opening

## 5 weeks out

- ☐ Enter employees into **Employee Maintenance** (they will all receive an email on creation inviting them to set their password for the system)
- ☐ Enter **Employee Schedules** (video tutorial on Resource page)
- ☐ This will allow online booking to be enabled and bookings to occur for your Grand Opening date

**3 weeks out**

- ☐ Submit your company/account information to the following companies for set up:
  - ○ **REQUIRED** Fiserv Merchant Account for processing:
    - ▪ Dan Seiler: [Daniel.seiler@fiserv.com](mailto:Daniel.seiler@fiserv.com)
  - ○ Optional but recommended: Tippy (for real time tip payouts to staff)
    - ▪ Deanne Rahn: [dee@meettippy.com](mailto:dee@meettippy.com)

**2 weeks out**

- ☐ Confirm receipt of all hardware
- ☐ Confirm receipt of credit card terminal and merchant account credentials and setup
- ☐ Contact SalonUltimate support team to schedule software installation (617-848-4399, options 2)
  - ○ *It is **critical** that you ensure ALL Windows updates have run and are up to date prior to SalonUltimate installation*
- ☐ Owner / Manager watch the Manager Functions Video from the [bookedby.com/sharkeys](http://bookedby.com/sharkeys) Resource page

**7 days out**

- ☐ 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)
- ☐ Have all stylists and store staff watch the Store Operations Video from the [bookedby.com/sharkeys](http://bookedby.com/sharkeys) Resource page
  - ○ Refresher views for Owner and/or Manager are also highly recommended!

**6 - 4 days out**

- ☐ Enter any additional toy **Inventory** items in **Inventory Maintenance**
- ☐ Enter store specific **Promotion Codes** for services or retail

**3 - 1 days out**

- ☐ Confirm store confirmations are setup and at least 4 weeks of Employee Schedules are entered in order to capture future booking opportunities during your Grand Opening