



## 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](mailto:am@bookedby.com)
  - Receive SalonUltimate / BookedBy resource page link:  
[bookedby.com/ko-onboarding](http://bookedby.com/ko-onboarding) 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**

- 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: Tippy (for real time tip payouts to staff)  
Deanne Rahn: [dee@meettippy.com](mailto:dee@meettippy.com)
  - Owner / Manager watch the Manager Functions Video from the  
[bookedby.com/ko-onboarding](http://bookedby.com/ko-onboarding) Resource page
  - Schedule Meeting for Salon Ultimate back-end review with  
[chelsi@knockouts.com](mailto:chelsi@knockouts.com)

### 3 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 day
- Complete meeting for Salon Ultimate back-end review with Chelsi ○ Check to ensure store number is accurate with corporate assigned store number

### 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*
  - YOU WILL DO THIS FROM HOME
- 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)
- SalonUltimate store will be created and installed on your store's computer Sunday prior to Friends and Family day

### 7 days out

- Set specific store settings based on recommended **Main System Settings**
- Have all stylists and store staff watch the Store Operations Video from the [bookedby.com/ko-onboarding](https://bookedby.com/ko-onboarding) Resource page
  - Refresher views for Owner and/or Manager are also highly recommended!

### 6 - 4 days out

- Enter any additional **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