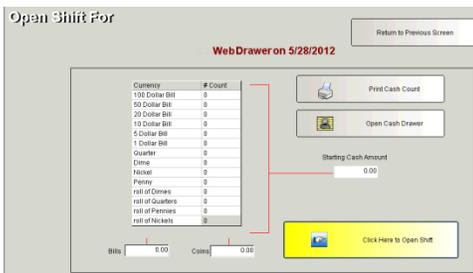




For successful Online Booking operations, it is important that your front desk staff takes ownership of the daily process. It is critical to appoint an accountable person to make sure gift cards to be shipped are handled and closing of the front desk shift includes reconciling all web payments. Having someone always aware will alleviate frustrations and eliminate costly mistakes.

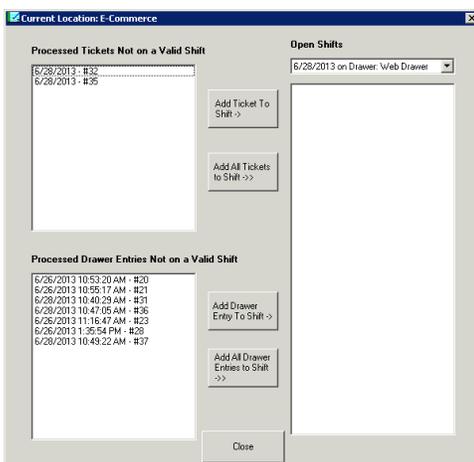
Here are some best practices and easy reporting for online operations.



Open a Shift for Your eCommerce Location

It is a best practice to keep a shift open for your online transactions. Since your online store is open 24/7 keeping a shift open makes reconciling easy. Your gift card activity will appear on the online booking activity report for the day the gift card ticket was placed on a shift. We recommend you open and close a shift every day.

1. From the menu bar, click on the SBLauncher (light bulb icon). Once SBLauncher opens, leave it open and exit the open instance of SalonBiz behind the SBLauncher. Once SalonBiz is closed, click the 'eCommerce' button in the SBLauncher to re-open SalonBiz in your eCommerce store.
2. From your eCommerce store in SalonBiz, click on the Operations (Sun/Moon) icon from the menu bar.
3. Click the Open Shift button. Since this is a non-tangible drawer, and no cash will ever be exchanged leave all currency fields at zero, so your Starting Cash Amount is zero.
4. Click the Click Here to Open Shift button.
5. Answer Yes to the message "Warning: Your starting cash balance is \$0.00. Do you still wish to open the shift?"
6. Click OK on the message "Please confirm the date of the shift."
7. Double click the desired day. Your Web Shift is now open.
8. Click to Exit SalonBiz and re-launch the program from your desktop icon to return to your default location.



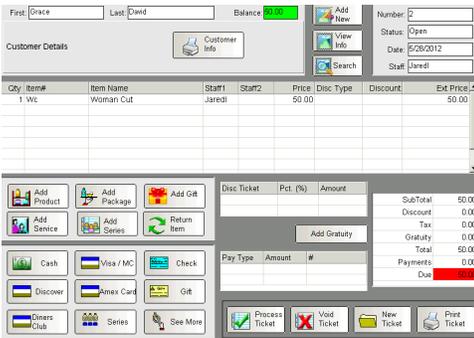
Ticket and Drawer Entry Fix

Moves tickets and drawer entries to an open shift

All online gift card sales have a ticket created and all service deposits have a drawer entry created in SalonBiz. If a shift is open at time of purchase, the ticket or drawer entry will be placed on the default shift. For any transactions made online when a shift is not open, you will use the Ticket and Drawer Entry Fix utility to place all gift card tickets or service deposit drawer entries to the open shift before closing each evening. Use the eCommerce Transactions by Date report to check off each ticket/gift card purchase and drawer entry/service deposit in your shift at closing.

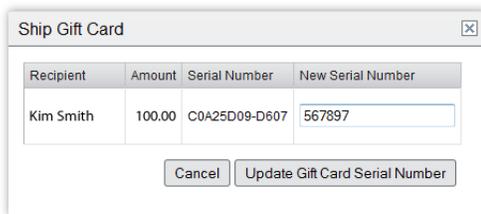
1. From the main menu bar click the SBLauncher (light bulb icon) button, (or your desktop shortcut) and then click on the Ticket Shift Fix button.

- Tickets and drawer entries that are not on a valid shift will appear on the left. Select an open shift from the drop down box on the right to which these tickets and drawer entries should be moved.
- Close and reconcile front desk shift as normal procedure. Tickets with gift card sales and drawer entries for service deposits will need to be balanced as Web Payment payments in the Payment Sum tab. These payments should be reconciled to the eCommerce Transactions by Date report.



Services Purchased Online

If you require a pre-payment for services booked online, the amount required to reserve the appointment will show in the client file as a store credit upon valid payment. A drawer entry is created in SalonBiz for the service deposit amount. Use the eCommerce Transactions by Date report to reconcile all drawer entries/service deposits to the web payments in your shift at closing. Run the Drawer Entry Shift Fix utility for any services booked while your shift was not open (above). Print each drawer entry by viewing it through the Ticket list in SalonBiz. You can get a list of all services booked in the Online Booking Activity report in Central. Store credits remain on file until used as payment. Use the Store Credit payment type to process the ticket at checkout.



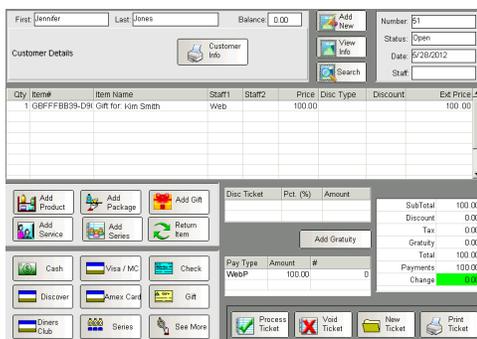
Shipping Gift Cards

If you have shipping of Gift cards enabled you will want to change the auto-generated gift card number that the system assigns the card to the number on the physical card that you will be sending to the recipient.

- From your Central dashboard, click Reports.
- Select your location (not All locations including Gift Cards) from dropdown at the top and desired date range
- From the Reports catalog, click Online Booking Activity
- Scroll down to the Online Gift Cards to be Shipped section.
- Click the Ship Gift Card link.
- Enter the New Serial Number in the space provided and click the Update Gift Card Serial Number button.
- Follow your internal procedures to ship the card.

Batching Your Credit Cards

Your Credit Card batch is set to automatically settle each night. You will not need to manually force or settle any transactions processed online. Once a batch is settled, a new batch is immediately started when the next transaction is processed.



Reconciling and Closing a Shift

It is important to almost simultaneously close your shift and generate the eCommerce Transactions by Date report to ensure that they match. We recommend you open and close a shift every day.

- From the menu bar, click on the Operations icon (Sun/Moon).
- In the View List drop down menu, select Shift.
- In the Filter by drop down menu, select Today's Shifts.
- Select the Web Drawer shift to reconcile by clicking on it once.
- Click the Close Shift button.

6. Scroll down to your Web Payment type. Gift cards purchased online will show up as the web payment.
7. Reconcile your web transactions like you would for a regular cash drawer. Make sure to click the Update Payment Summary button when finished.
8. Click on the Close Shift button.
9. Answer Yes to "Are you sure you wish to close the shift?"
10. Click on the Reconcile Shift button.
11. Answer Yes to the message "Are you sure you wish to Reconcile your shift? All settings will be permanent and unchangeable."

Close Shift For

Web Drawer on 2/28/2012

Close Shift Reconcile Shift Return to Previous

Payment Sum	Reconcile Cash	Cash Trans	Payment Trans	Ticket List	Credit Trans	
Starting Balance	# of Pymt	Payment Amt	Change Drf	Drawer Entries	You Have	Sum
Cash	0.00	0	0.00	0.00	0.00	0.00
Check	0.00	0	0.00	0.00	0.00	0.00
Rewards	0.00	0	0.00	0.00	0.00	0.00
Visa/MC	0.00	0	0.00	0.00	0.00	0.00
Discover	0.00	0	0.00	0.00	0.00	0.00
Series	0.00	0	0.00	0.00	0.00	0.00
Gift	0.00	0	0.00	0.00	0.00	0.00
Store Credit	0.00	0	0.00	0.00	0.00	0.00
Cut Over	0.00	0	0.00	0.00	0.00	0.00
Primo Credit	0.00	0	0.00	0.00	0.00	0.00
Web Pay	0.00	1	725.00	0.00	0.00	725.00

Change Starting Cash
Error Note

View Shift Summary
Print Payment Summary

Paris Parker - E-Commerce 5/20/2012 1:00:00PM

eCommerce Transactions Report for 05/14/2012 to 5/14/2012

Paris Parker - E-Commerce

Client ID : 104

Via

Transaction Type	W/C/O/F	Ticket Num	Authorization	Amount	Tp	Total	Date	Time
Sale	WEB	0	TAL50	\$115.00	\$0.00	\$115.00	05/14/2012	8:19:56 AM
Sale	WEB	0	TAL50	\$115.00	\$0.00	\$115.00	05/14/2012	8:30:17 AM
Sale	WEB	0	TAL50	\$115.00	\$0.00	\$115.00	05/14/2012	8:32:54 AM
Sale	WEB	0	TAL57	\$100.00	\$0.00	\$100.00	05/14/2012	8:33:15 AM
Sale	WEB	0	TAL59	\$115.00	\$0.00	\$115.00	05/14/2012	9:15:52 AM
Sale	WEB	0	TAL56	\$100.00	\$0.00	\$100.00	05/14/2012	9:24:11 PM
Sale	WEB	0	TAL51	\$115.00	\$0.00	\$115.00	05/14/2012	9:30:34 PM
Sale	WEB	0	TAL51	\$115.00	\$0.00	\$115.00	05/14/2012	9:36:20 PM
Sale	WEB	0	TAL50	\$100.00	\$0.00	\$100.00	05/14/2012	9:34:07 PM
Sale	WEB	0	TAL58	\$100.00	\$0.00	\$100.00	05/14/2012	9:44:11 PM
Sale	WEB	0	TAL57	\$100.00	\$0.00	\$100.00	05/14/2012	10:04:30 PM
Sub Totals				975.00	\$0.00	975.00		
WEB Transactions Totals				11 transactions	975.00	\$0.00	975.00	
C/O/F Transactions Totals				0 transactions	\$0.00	\$0.00		

SalonBiz Reports

Activity Details

Services Outstanding

Date/Time	Location	Client	App/Class & Time	Staff	Service or Product Name	Amount	Projected Revenue
21-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	80.00
22-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	80.00
23-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	80.00
24-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	80.00
25-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	80.00
Projected Total						400.00	400.00

Services Redeemed

Date/Time	Location	Client	App/Class & Time	Staff	Service or Product Name	Amount	Service Date
13-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/13
14-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/14
15-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/15
16-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/16
17-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/17
18-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/18
19-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/19
20-May-2012 09:00 AM	Paris Parker - Paris	Christa-Lee	10-May-2012 09:00 AM	Christa-Lee	Waxing Cur	80.00	10/20

Reports

You will be able to utilize reports to monitor the success of Online Booking. The two main reports that offer a checks and balance are the eCommerce Report which records payments, and the Online Booking Activity report which records all the actions made that relate to online booking. Your system administrator can also access an Email Confirmation report to view emails that were sent within a date range.

- The eCommerce Transactions by Date report is available under the Credit Card report category. This report can be generated at any time during the day since a batch record is not required to generate information on the report.
- The Drawer Entry Listing is available under Sales Tickets report category. View daily to show all service deposits received.
- Online Activity report is available in Central Reports. This report should be generated daily for a list of gift cards that need to be shipped and will provide all appointments booked online for a single day or date range.
- The Daily Summary report will include service deposits as drawer entries and gift card sales as payments received in Web Payments.