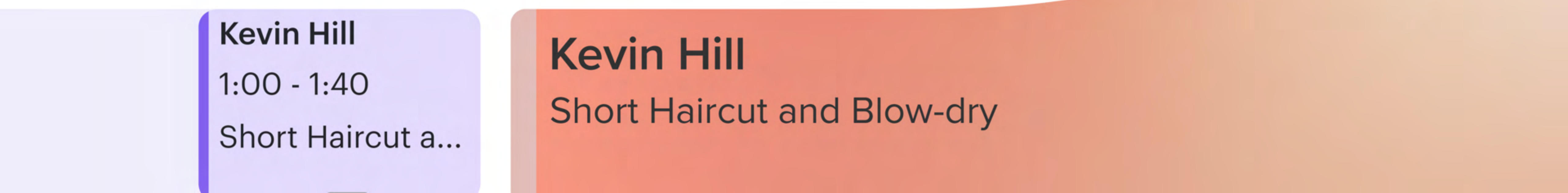
The Path to Success With Your New Vagaro Calendar

schedulicity
a vagaro company



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2. Add Your Business Logo and Upload Pictures of Your Work
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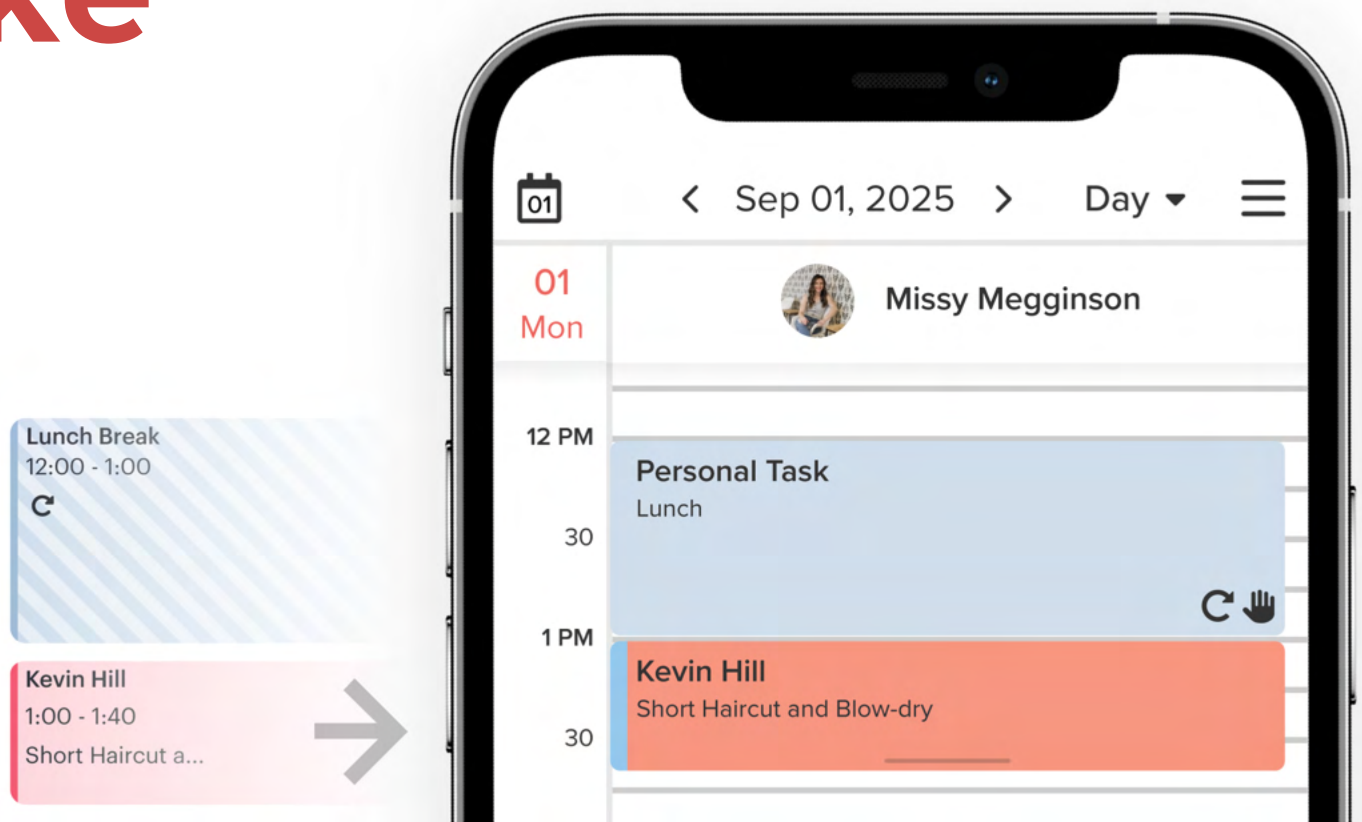
Get Familiar With What Things Look Like



Alerts and Updates

With Vagaro, all of your notifications can be found by clicking the notifications icon in the top right corner of the screen.

Here are the type of notifications to be on the look out for:

- Information about new features
- Waitlist updates
- Pending appointment requests
- Booked appointments

Icon Differences

- Marking an appointment as a “no show” will now turn that appointment block red — instead of the ☹ icon.
- Notes on an appointment block will be identified with three different “Note” icons — instead of a 📎 icon.
- There are four different Vagaro icons that tell you exactly what special offer or promotion is attached to that appointment — instead of the 🏷 icon.
- When an appointment is confirmed, that appointment block will turn pink — rather than display a ✔ icon.
- When an appointment is checked out and completed, that appointment block will simply turn gray instead of displaying a $ icon.

Recurring Appointment
An appointment that is set to repeat for future visits.

Stopped Recurring Appointment
An appointment that was part of a repeated series that has been edited.

Bundle
This is shown that a customer booked a service that is part of a Service Bundle.

Mobile Service
An appointment that is performed off-site at the customer's home or another off-site location.

Note
Indicates that there is a customer note or that the client left a note while booking.

Popup Note
Indicates that there is an important pop up note entered in the customer's profile that display whenever the customer is selected on the calendar or checkout screen.

Appointment Note
This appointment has an appointment note.

Form Required
This indicates that there is a form the client is required to complete before their appointment.

Employee Signature Required
This indicates that there is a form that requires an employee signature for this appointment.

Pre-paid Appointment
This indicates that the customer has already paid for this appointment online.

Show - Checked In
This indicates that the customer has checked in for this appointment.

Online Booking Blocked
This indicates that the service provider has a Personal Task and has blocked online booking for that period.

Vagaro Marketplace
This appointment was booked on the Vagaro.com marketplace.

Vagaro Daily Deal
This appointment was booked through a Daily Deal.

Vagaro Featured
This appointment was booked through the Get Featured section and ads.

Vagaro Text/Email Marketing
This appointment was booked via a link from a text/email marketing campaign.

Booked on Instagram
Shown when a client booked their appointment through the Book button on Instagram. You can track how many customers booked through your Instagram business page by running the Source report.

Booked on Facebook
Shown when a client booked their appointment through the Book button on Facebook. You can track how many customers booked through your Facebookbusiness page by running the Source report.

Booked on Yelp
Shown when a client booked their appointment through the Book button on Yelp. You can track how many customers booked through your Yelp business page by running the Source report.

Booked on Apple Maps
Shown when a client booked their appointment using Apple Maps. You can track how many customers booked using Apple Maps by running the Source report.

Booked on Google
Shown when a client booked their appointment through Google Maps. You can track how many customers booked using Google by running the Source report.

Membership
The appointment was booked using a membership either in-house or online.

Package
The appointment was booked using a package either in-house or online.

Deposit Paid
The customer has paid a deposit for this appointment either in-house or online.

Add-On
The service or class has add-ons that may add time to the appointment.

NR **New Request**
A new client who has requested a specific employee to perform the service. Assigning this appointment type is only used to track customer retention.

RR **Return Request**
A returning client who has requested a specific employee to perform the service. Assigning this appointment type is only used to track customer retention.

RNR **Return Non Request**
A returning client who did not request a specific employee to perform the service. Assigning this appointment type is only used to track customer retention.

NNR **New Non Request**
A new client who did not request a specific employee to perform the service. Assigning this appointment type is only used to track customer retention.

Requested
If your business requires customers' online bookings to be approved, it stays in the requested status until it is approved or denied.

Confirmed
The business has received confirmation, either verbally or a response through a notification, that the client will be there for their appointment.

Ready to Start
Clients who used the Contactless Check-In feature have been notified that the business is ready for them and that they may enter the business for their appointment.

Personal Task
A Personal Task that an employee has scheduled but customers are still able to book appointments during those timeslots.

Accepted
A requested appointment has been approved by the business and added to the calendar.

Show
Indicates that a client arrived for their appointment.

In Progress
The appointment has already begun.

Personal Task Blocked
A Personal Task that an employee has booked that does not allow customers to book appointments during those timeslots.

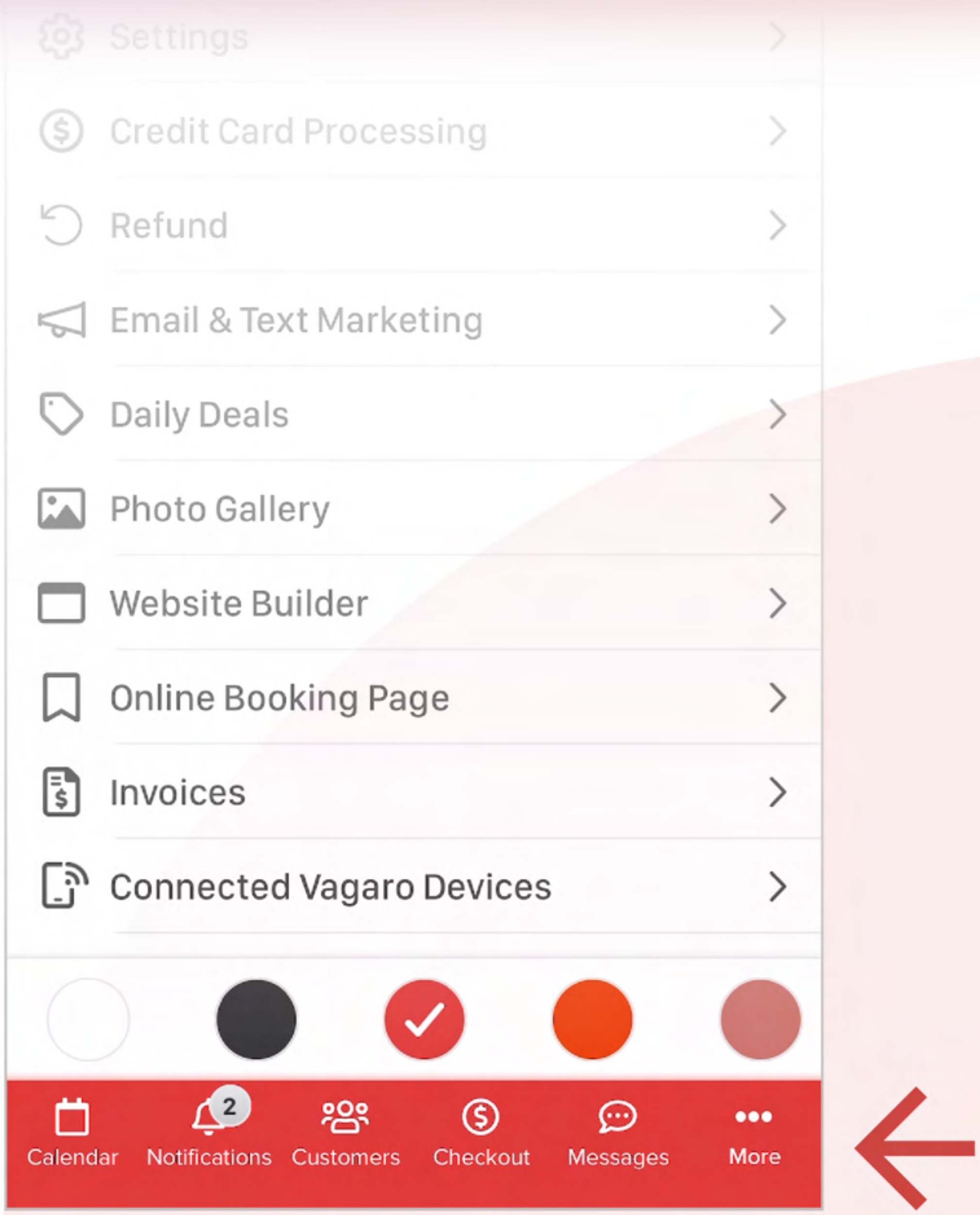
Awaiting Confirmation
Based on your business's customer notification settings, your clients will receive an appointment confirmation message within a certain number of hours or days before their appointment. This status shows that the confirmation request has been sent to the client and is awaiting their response.

No Show
The business manually selects this status on the calendar screen to indicate that the customer did not shown up for an appointment. You can also run the Cancellations & No-Shows report to see which customers missed their appointments and how often.

Complete
Once the appointment is completed, use this status to show that the service has been performed and the appointment has been completed.

Accessing Your Settings

To access settings and more on your mobile device, instead of clicking the Hamburger Icon in the upper right hand corner like you did on Schedulicity, you will now click the three dots that say “More” in the lower right hand corner of your screen.

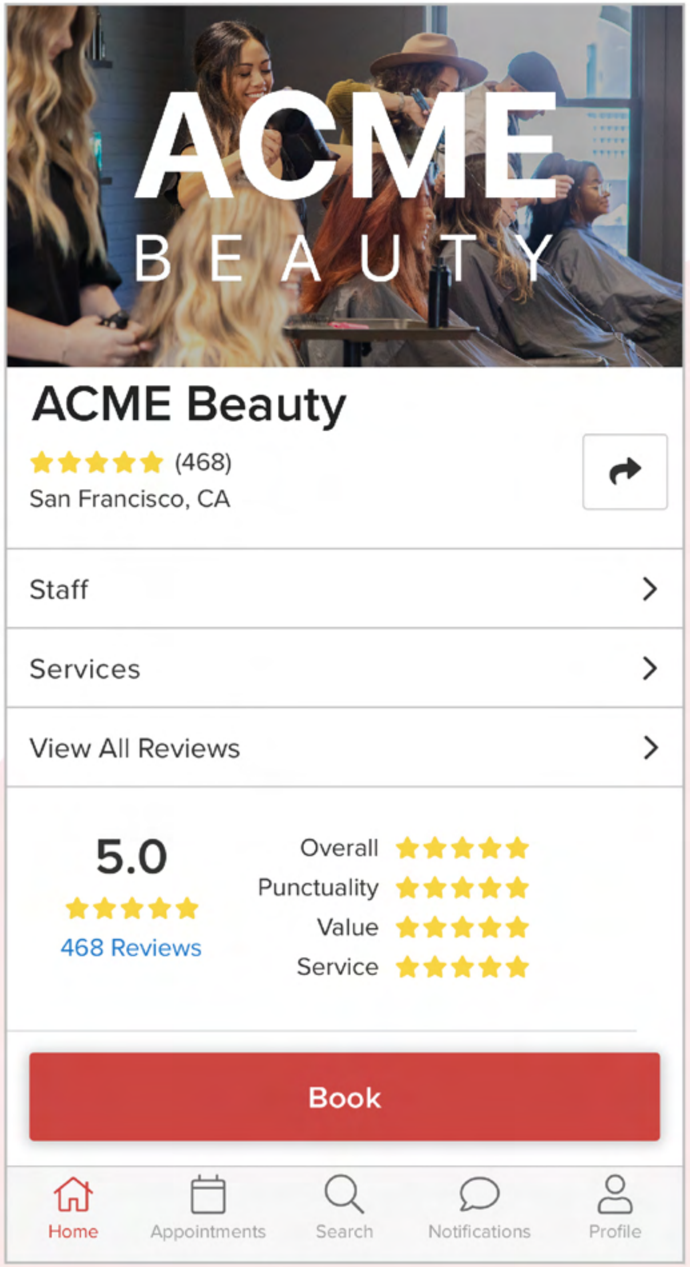


Add Your Business Logo and Upload Pictures of Your Work to Your New Portfolio

How to Add Your Logo to Your Vagaro Listing Page

You can now add photos and images to your Business Listing Page. This is a great way to attract new online customers and showcase your work!

You can create up to three portfolios with three images in each of them to show off your work.

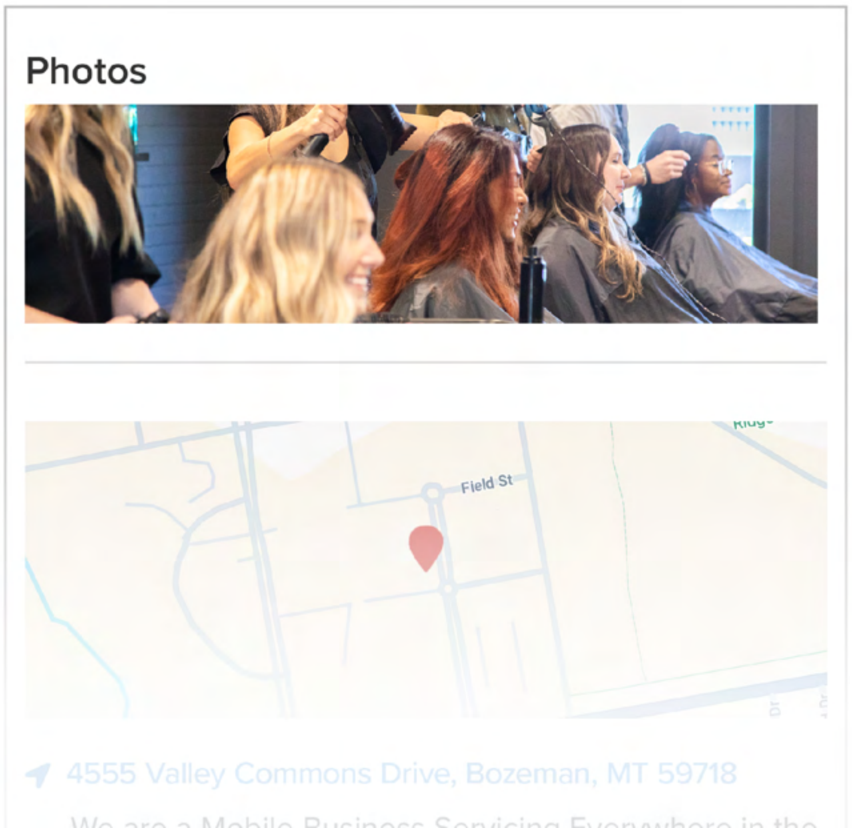


- Go to Photo Gallery.
    - **On the Web:** At the top of the screen, select Settings, scroll down the left side menu to the Look & Feel heading, and then select Photo Gallery.
    - **On a Tablet:** At the bottom of the screen, select Settings, scroll down to the Look & Feel heading, and then select Photo Gallery.
- At the top of the screen, ensure that the Venue Gallery tab is selected.
- Select Add Business Image, then choose the image you want to upload. Your image is displayed in the gallery.
- Select Add Venue Gallery, then choose your image. Your image is displayed in the gallery.
- To see how your picture will look on your Vagaro Listing Page, select View Result at the bottom of the screen. Your logo is now displayed next to your business name at the top of the page.





How to Upload Picture of Your Work to Your New Portfolio

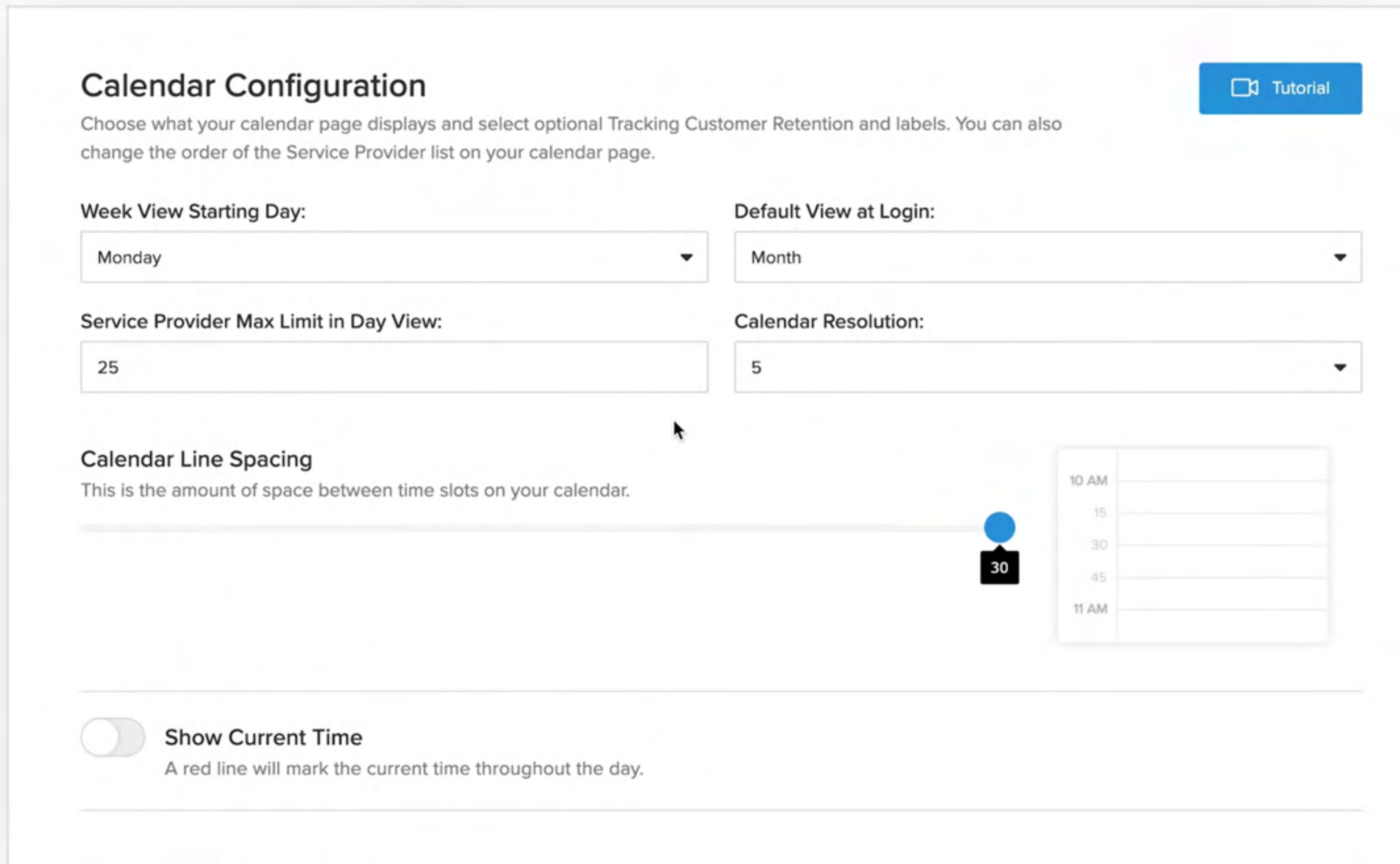


- Go to Photo Gallery.
    - **On the Web:** At the top of the screen, select Settings, scroll down the left side menu to the Look & Feel heading, and then select Photo Gallery.
    - **On a Tablet:** At the bottom of the screen, select Settings, scroll down to the Look & Feel heading, and then select Photo Gallery.
- At the top of the screen, select the Portfolio tab, and then select Add Portfolio Image.
- Read the description of the feature, and then select Next.
- Select Add Venue Gallery, then choose your image. Your image is displayed in the gallery.

Add photos to the portfolio:

- Select up to three photos to upload and enter a description about each one.
- To change a picture to another one, hover over the image, select Edit, make your changes, and then select Save.
- To remove a picture from the portfolio (for example, if you want to show only 2 photos instead of 3), hover over the image, and then select Delete.
- Choose Select as Featured below the photo you want to use as the cover image for the portfolio, and then select Next.
- Enter a Title and Description for the photo, and then select the Category, Service, and Service Provider who performed the work in the photo, as well as any other details if requested.
- Review your images and their descriptions. If you need to change something, select the Back button.
- Select “I comply with portfolio guidelines” to read Vagaro's Portfolio Guidelines, and then select the check box to acknowledge that your photos meet our requirements.
- Select Save.

Check Out Your Calendar Settings



Check Out Your Calendar Settings

We have already taken care of transferring your existing settings over, but if you want to change the way anything looks, you have full control to change things like:

- Your calendar's time intervals
- If you want a red line to show the current time

Where to access Settings:

- **On the Phone:** Go to More → Settings → Calendar Configuration.
- **On the Web:** Tablet, or Pay Desk: Go to Settings → Calendar Configuration.

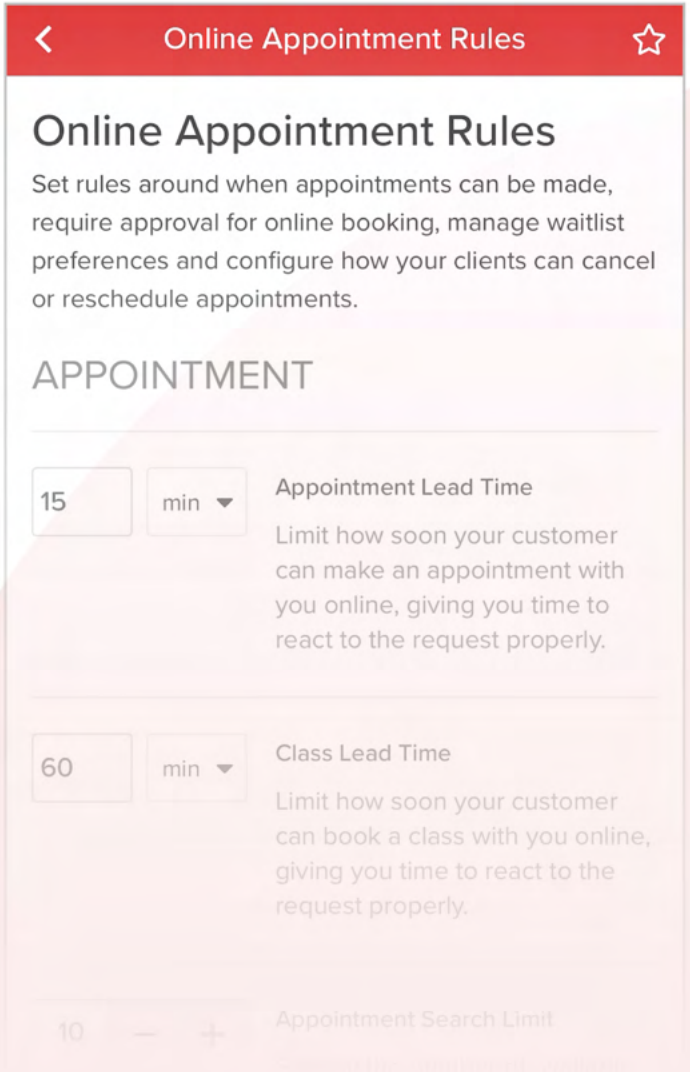
You also still have full control over who can book on your calendar — and how!

Here are some of the Appointment Rules you can customize:

- **Require an Acceptance for Online Booking:** Your business can deny or approve a customer's request to book online.
- **Customer's request to book online.**
- **Block New Customers from Online Booking.**
- **Lead Time:** How soon before an appointment a customer can book.
- **Waitlist Settings:** With Vagaro, you now have four different choices for how your waitlist operates.
- **Canceling Appointments:** Choose if customers can cancel their appointment and the minimum amount of hours before the appointment.
- **Rescheduling Appointments:** Allow customers to reschedule their appointment and the minimum amount of hours clients can reschedule before an appointment.

How to Access Online Appointment Rules:

- Appointment Policies are now called Appointment Rules
  - **On the Phone:** More → Settings → Online Appointment Rules
  - **On the Web:** Settings → Booking → Online Appointment Rules



Text and Email Reminders

Good news! Your clients are automatically opted in to text reminders!

Plus, you can control how clients are notified, confirmed, and reminded when booking appointments.

You can also include additional information in your emails.

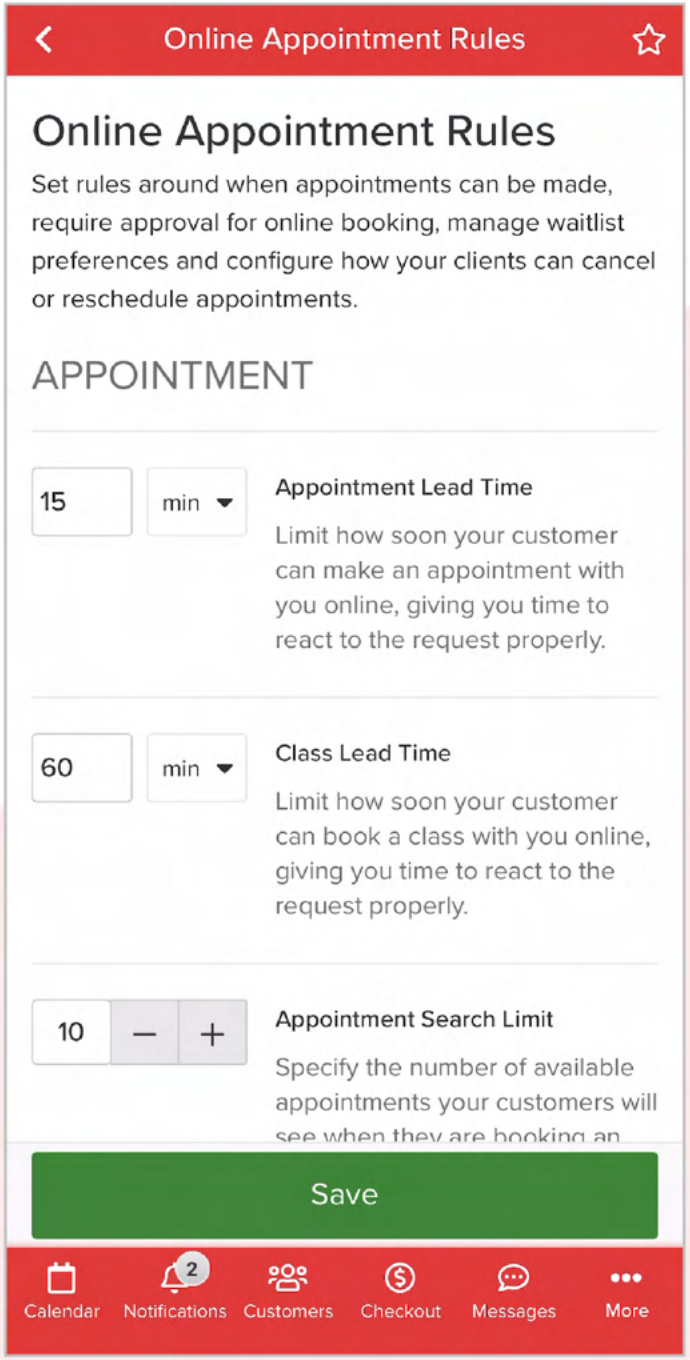
Where to Access Text and Email Reminders:

- **On a Phone:** Go to More → Settings → Email & Text Notifications.
- **Web Version:** Go to Settings → Booking → Email & Text Notifications.

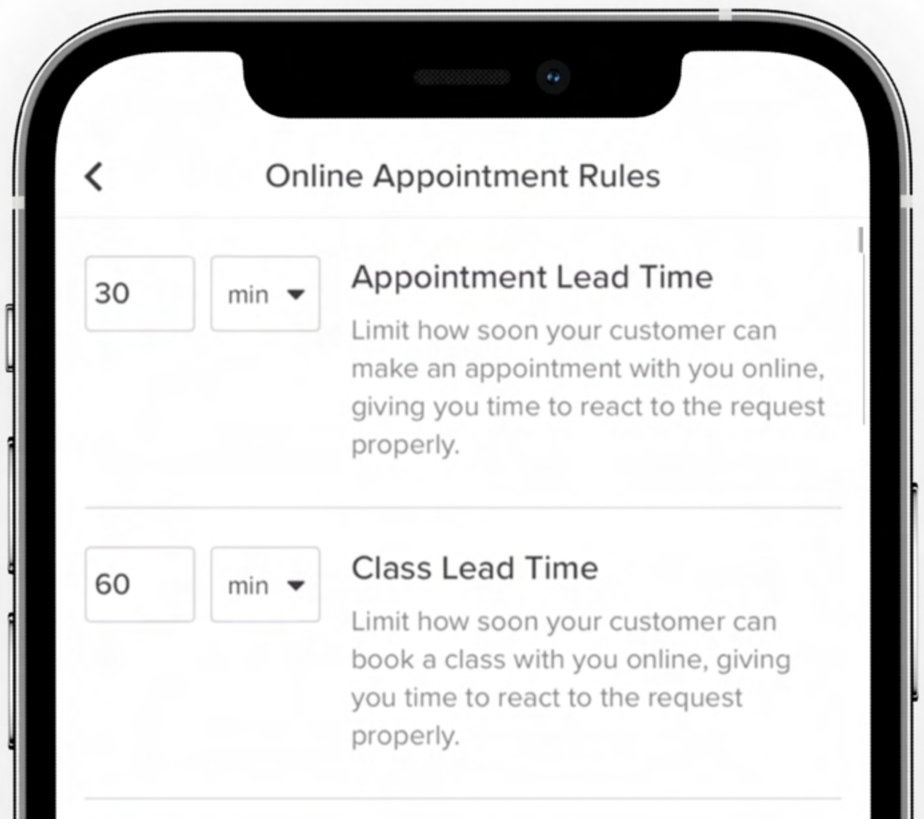
Cancellation Policies are Now Under Online Appointment Rules

Where to Edit Your Cancellation Policies:

- **On a Phone:** Go to More → Settings → Online Appointment Rules.
- **On the Web:** Go to Settings → Online Appointment Rules.



Customize Your Service Settings



Customize Your Service Settings

Your service list has already been transferred over, but let's take a look at how you can make any additions or edits.

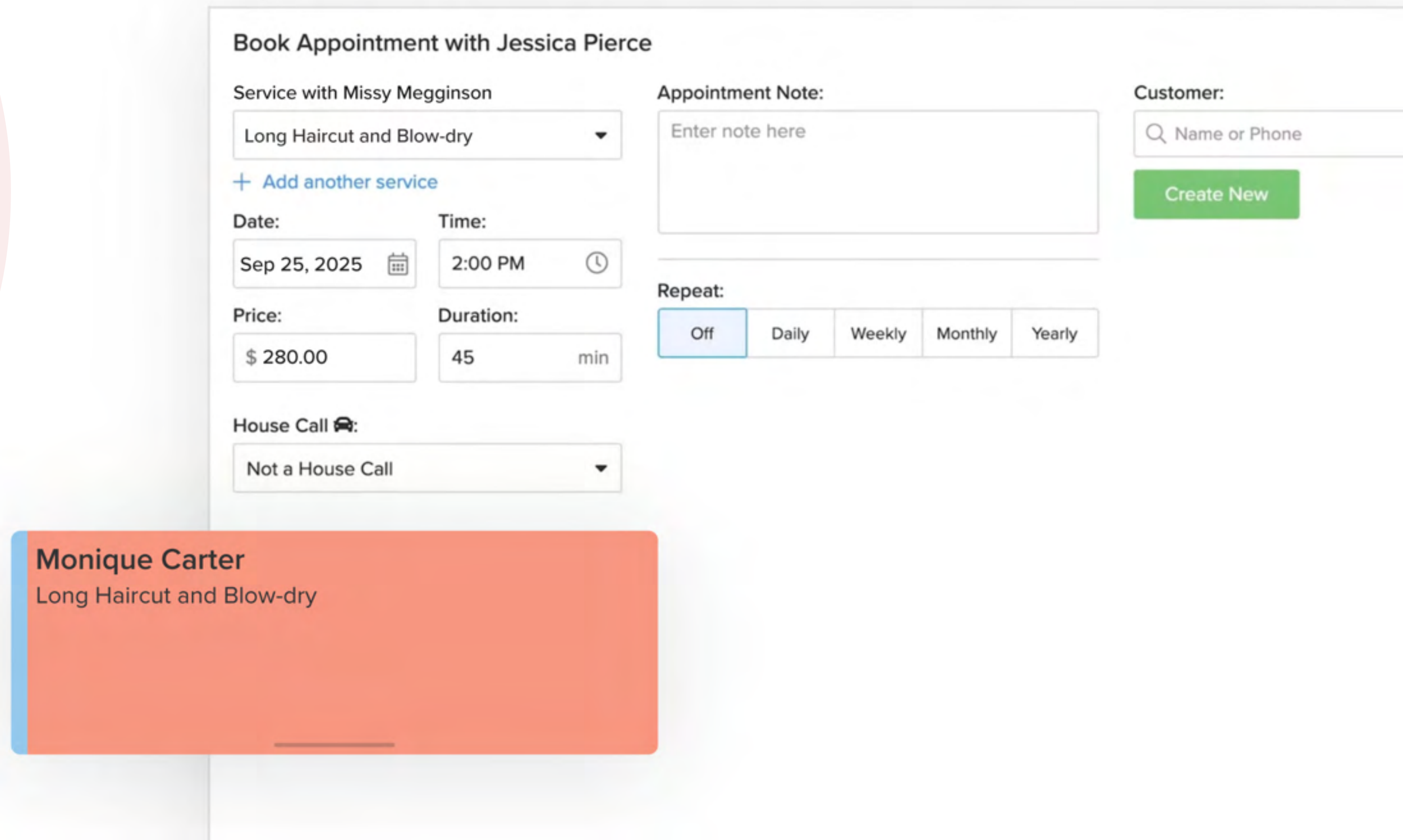
Where to Edit Your Service Settings:

- **On a Phone:** Go to More → Settings → Service/Class Menu
- **On Desktop:** Go to Settings → Service/Class Menu

Pro Tip

If you would like to add Processing Time to your appointments, like in Schedulicity, that is now called Gap Time with Vagaro.

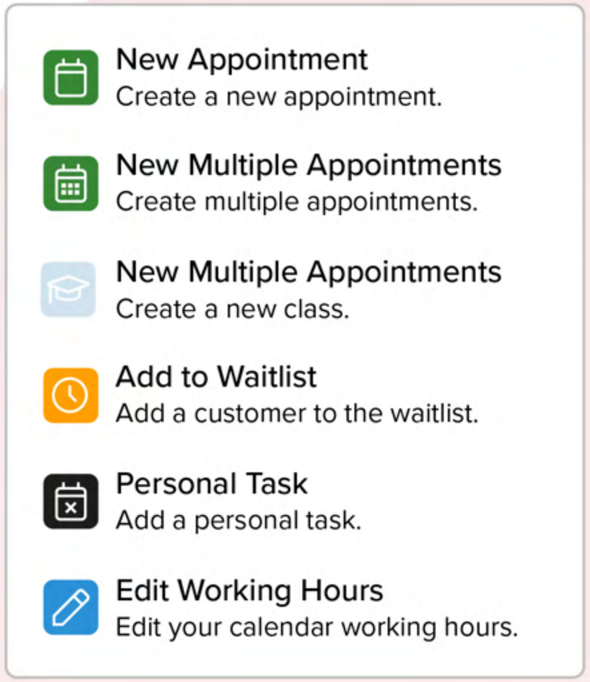
5 Practice Scheduling an Appointment



Practice Scheduling an Appointment

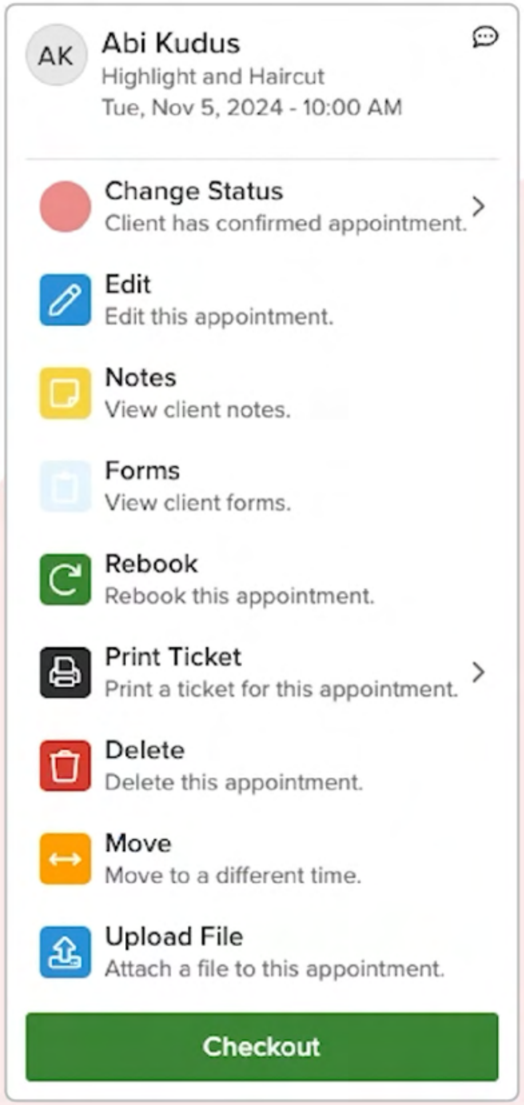
A single click on an open time slot on your new Vagaro calendar gives you the option to do five things:

- Create a new appointment
- Create multiple appointments
- Add a customer to the waitlist
- Schedule a personal task (known as "Personal Time" in Schedulicity)
- Edit working hours

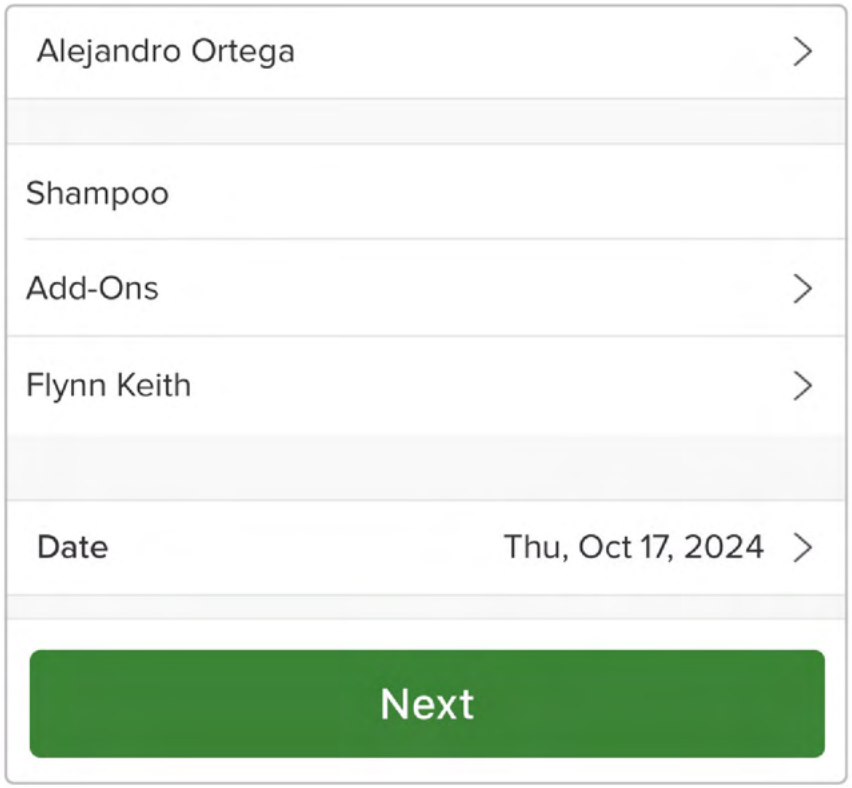


A single click on an existing appointment block on your new Vagaro calendar gives you the option to do nine things:

- Change the color status of the appointment
- Edit the appointment
- View client notes
- View client forms
- Rebook
- Print a ticket
- Delete
- Use the move tool
- Upload a file



Rescheduling Appointments

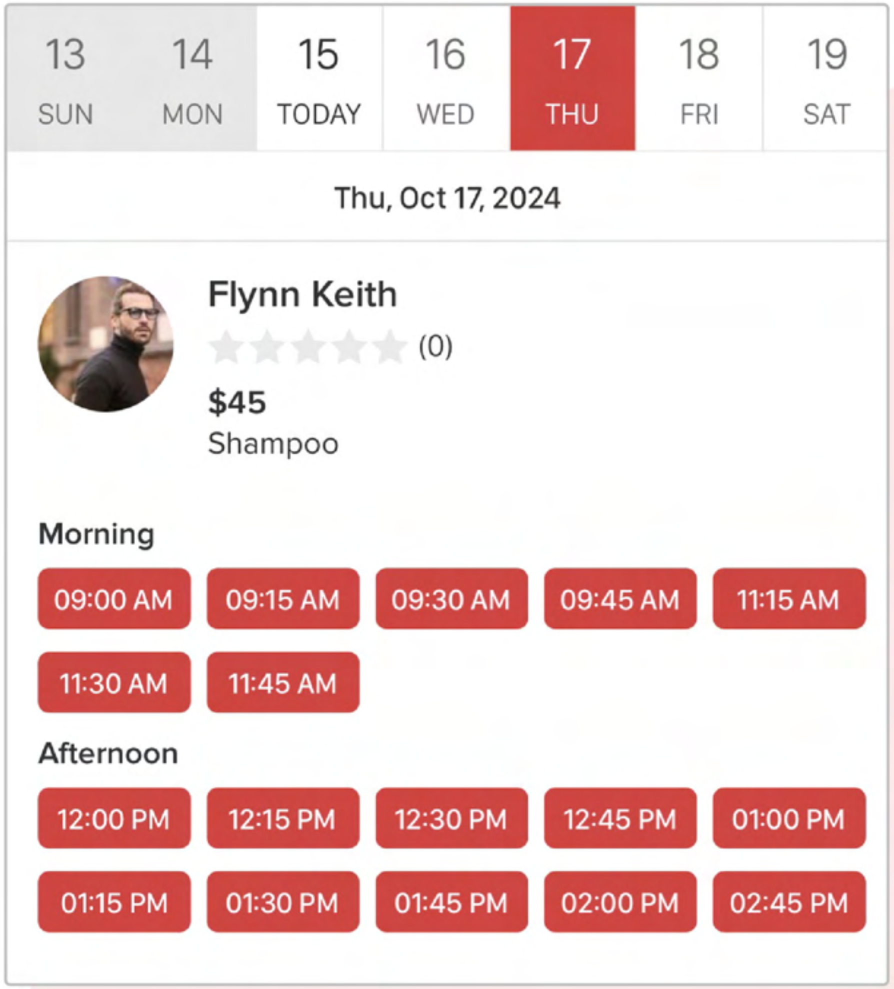


How to Reschedule an Appointment:

- If you liked rescheduling appointments with the Schedulicity Appointment Clipboard, you can now use the Move Tool.
- From your calendar, find the appointment, select it, then select Move.
- Select Date and choose the new appointment date.
- Select Next. The list of all available appointments for that day will be displayed.
- Hit Save.

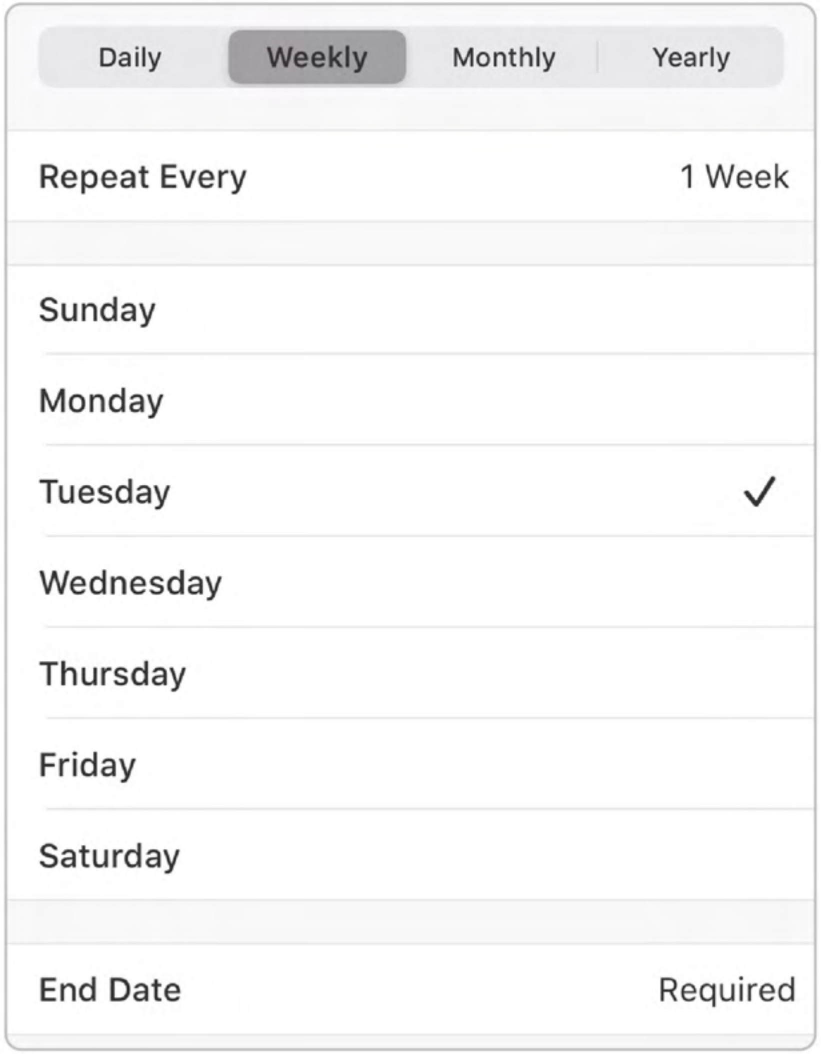
You can also reschedule an appointment by simply clicking the Reschedule button.

- From your calendar, find the appointment, select it, then select Reschedule.
- Select Date and choose the new appointment date.
- Select Next. The list of all available appointments for that day will be displayed.
- Hit Save



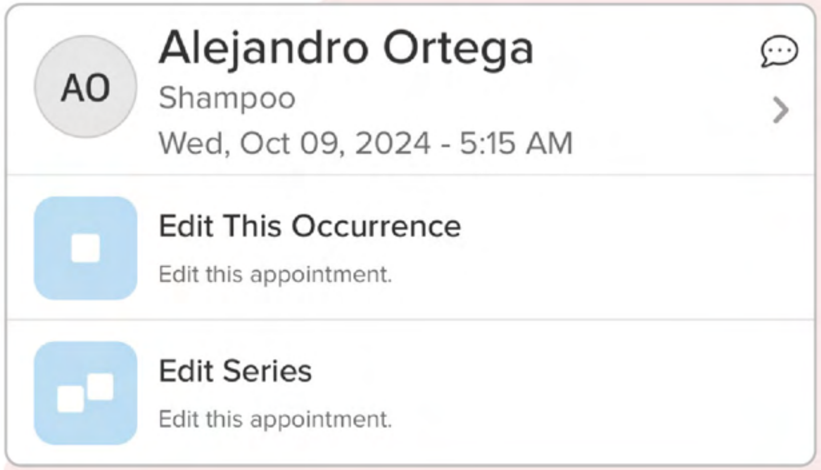
Setting Recurring Appointments

- Select an available time slot on the calendar, then select New Appointment.
- Select Customer and Service to be booked
- Select Repeat
- You can then choose the increments that you want that appointment to repeat. (You will have to choose an end for when the appointment stops repeating.)
- Select Save and Book Appointment.

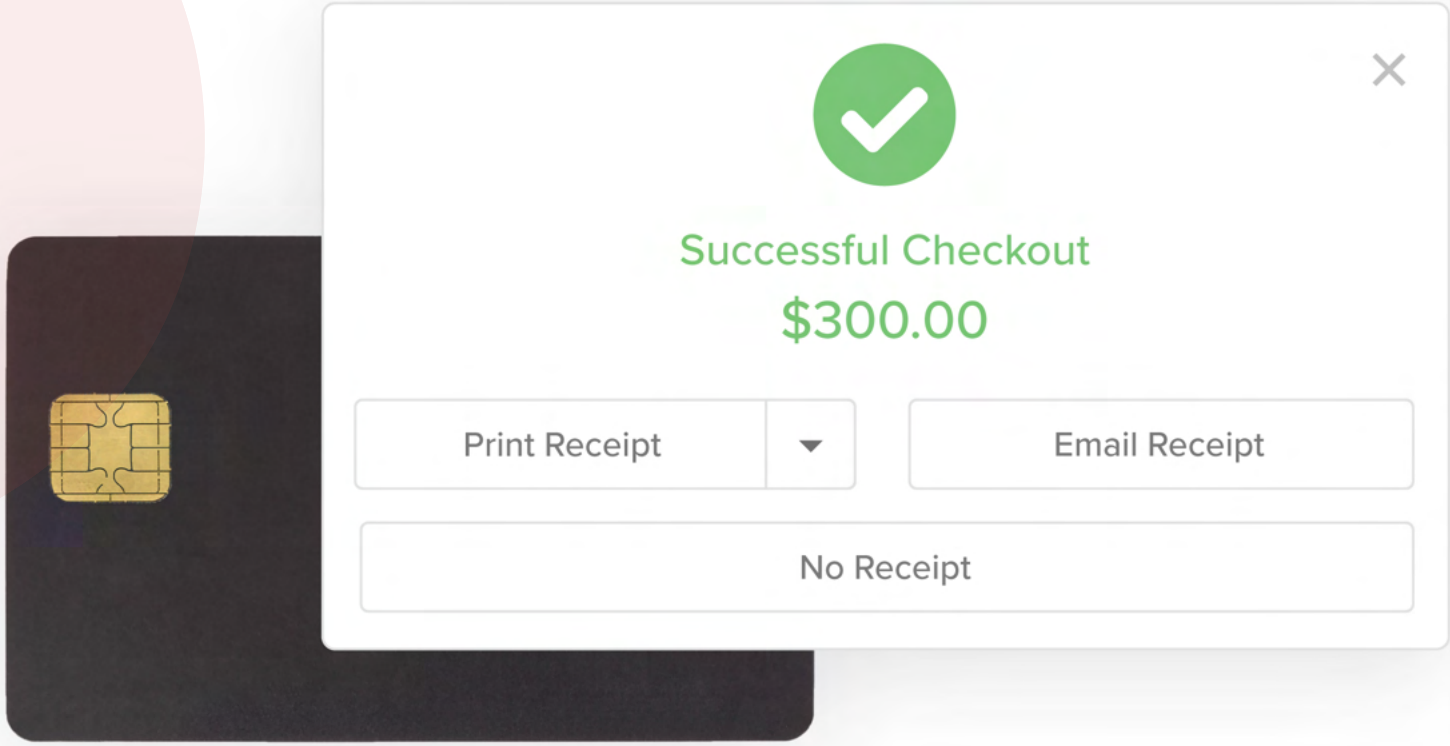


Editing Recurring Appointments

- Click the appointment block and then choose Edit.
- From there you can choose if you want to edit that single appointment, or the entire series.



Checkout and Rebook Your First Client!



Checkout and Rebook Your First Client!

First, let's look at your Checkout Settings.

Here, you can edit these options:

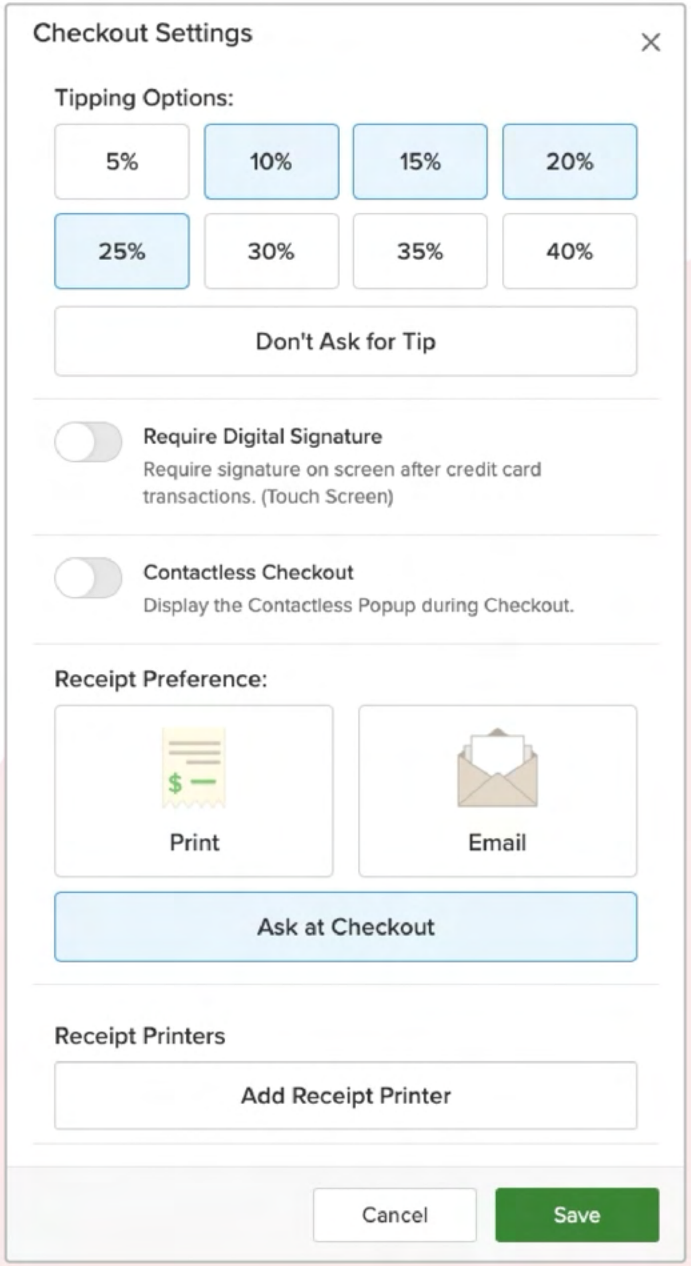
- Set Tipping Options
- Require Digital Signature
- Contactless Checkout
- Receipt Preference

Pro Tip

Remember: To check out a client with a credit card, you will need to set up Vagaro Merchant Systems for processing payments.

To adjust your Checkout Settings:

- Go to the Checkout screen.
- Go to your the Checkout Settings:
  - **On Mobile:** In the top-right corner, select the Gear icon.
  - **On Desktop:** In the bottom-right corner of the screen, select the Arrow down button, then select Checkout Settings.



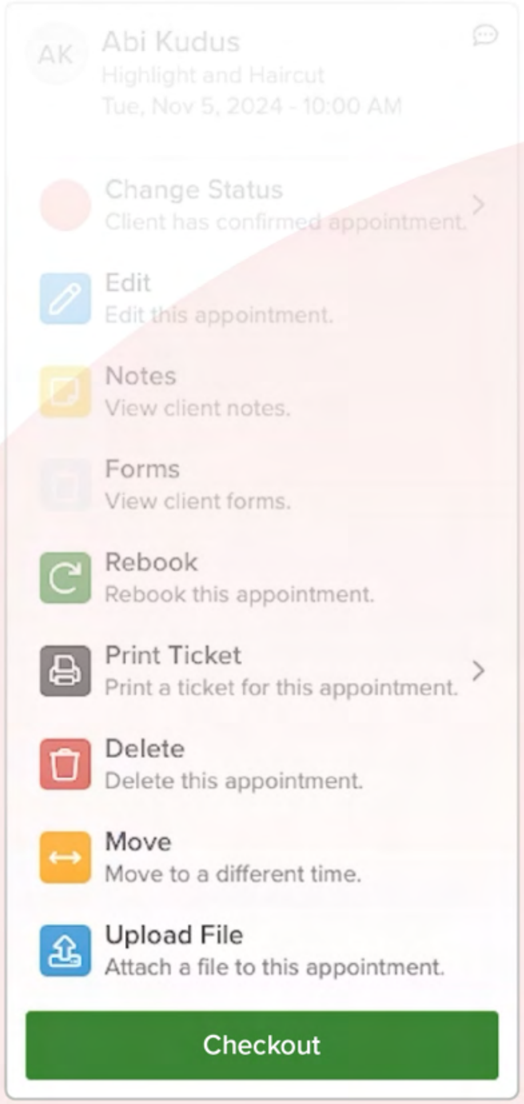
Standard Checkout

Go to Checkout.

Or, from your appointment calendar:

- Click on the appointment block.
- Scroll down to the bottom and hit the Green Checkout Button.

Select Checkout.

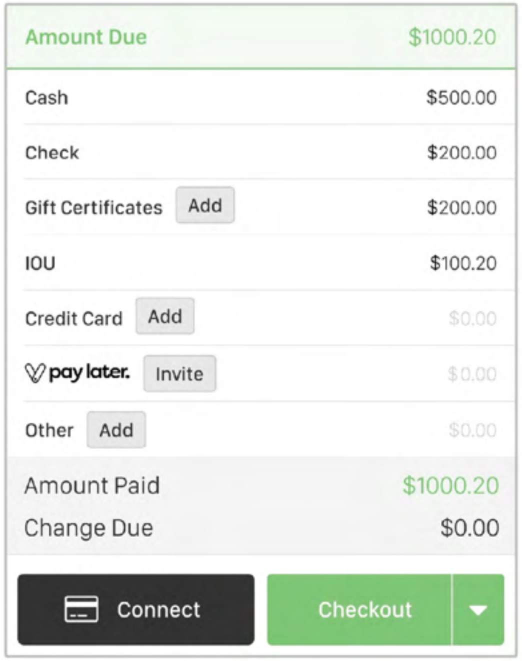


For cash:

- In the Cash box, enter the amount received from the customer.
- Ensure that the “Amount Paid” is green.
- If you have tipping turned on:
    - Select "$0.00" next to the tip field.
    - Enter a tip amount or select from one of the percentages. The tip field will automatically update.
- Select Checkout.

For card:

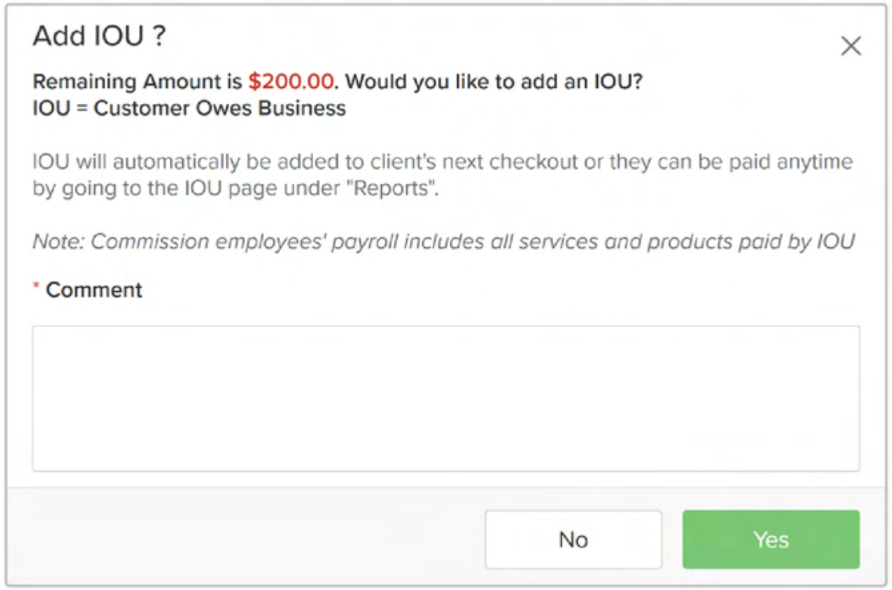
- Select the Credit Card box and enter the amount to be charged.
- Select Checkout.
- Charge the customer's credit or debit card. A tip and signature popup will display.
- If applicable, ask the customer to sign the transaction and select from the preset tip options.
- Select Checkout.



Split Card Payment

On Mobile:

- Enter an amount in IOU.
- This will be the payment for the second credit card.
- Charge the first card. The Add IOU popup displays as you charge the card.
- Enter a comment, then select Proceed.
- After checking out the partial payment, go back to the Checkout screen and select the customer again.
- The IOU will display in the cart, and you can charge the IOU amount using the second credit card.



On Desktop:

- Enter an amount in IOU.
- This will be the payment for the second credit card.
- Charge the first card. The Add IOU popup displays as you charge the card.
- Enter a comment, then select Yes.
- After checking out the partial payment, go back to the Checkout screen and select the customer again.
- The IOU will display in the cart, and you can charge the IOU amount using the second credit card.

Pro Tip

You no longer need to go through the checkout process twice for split payments, like you did with Schedulicity.

Split Payment with Cash and Card

On Mobile and Desktop:

- Enter the first payment method, like cash or check.
- Charge the customer's card through the credit card reader or a card on file and complete the transaction.

Pro Tip

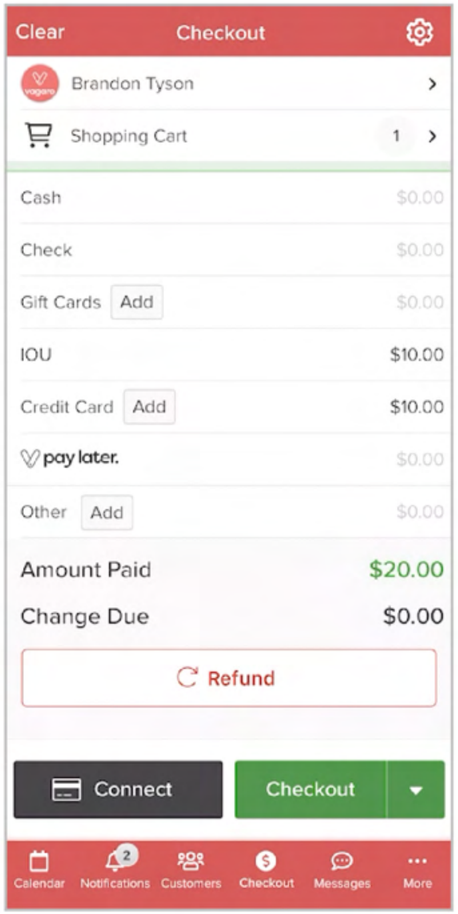
Remember: You no longer need to go through the checkout process twice for split payments.

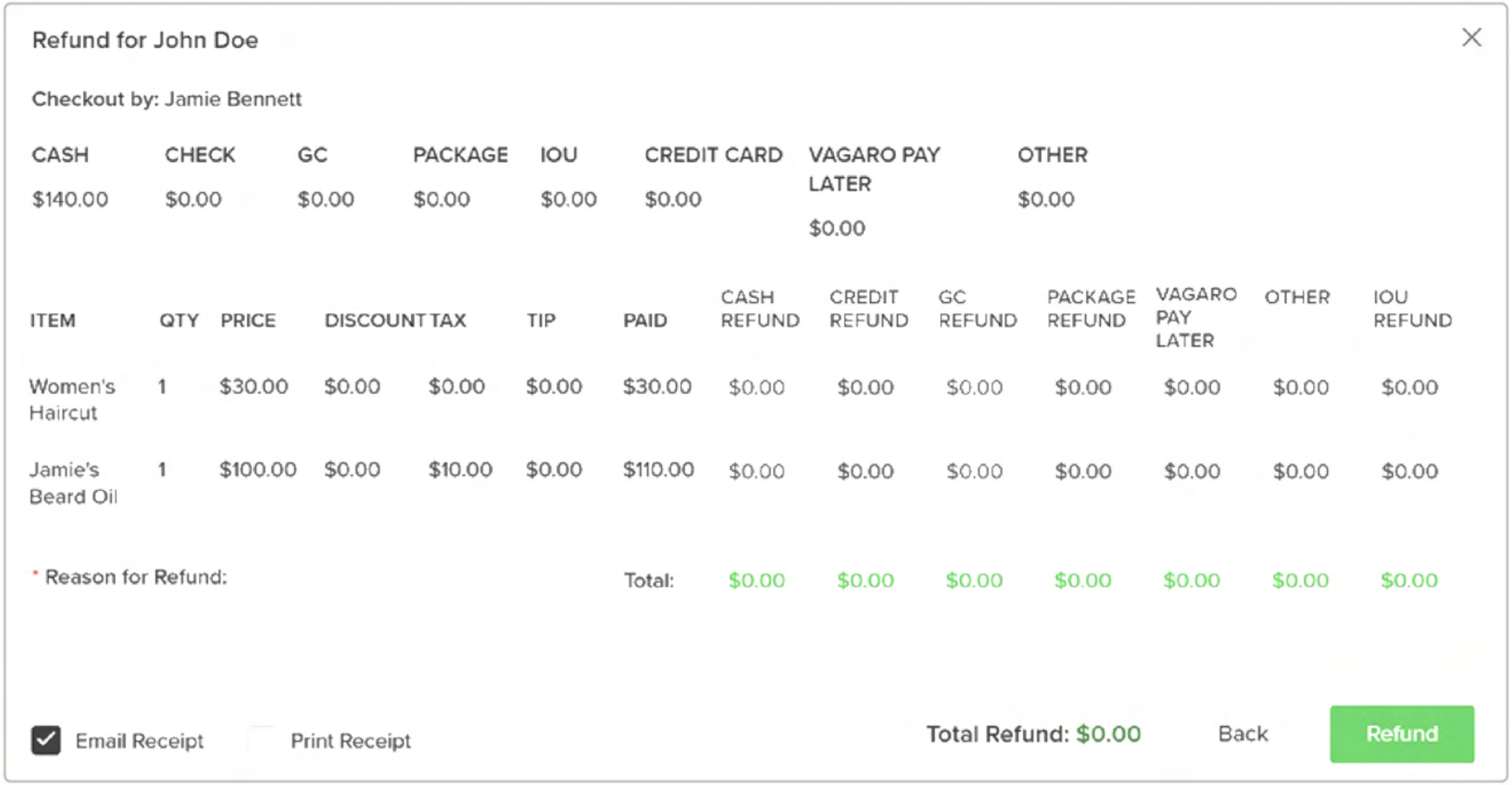
How to Issue a Refund

You can refund your customers directly from their customer profile.

On Mobile:

- Go to the Customers Icon on the bottom of your screen and select the customer's profile.
- Scroll to the bottom of the screen, then select Refund to open the customer's transaction history.
- Select the transaction to be refunded, then select Refund.
- Select Refund under the item.
- Enter the full or partial Refund Amount. Optionally, if a tip was included, you can enter the Tip refund.
- Select Next.
- You can split a refund between two payment methods, such as cash and a gift card, and then select Submit.
- Review the Refund Summary, then select Refund.


Clear
Checkout
Brandon Tyson
Shopping Cart 1
Cash $0.00
Check $0.00
Gift Cards Add $0.00
IOU $10.00
Credit Card Add $10.00
pay later. $0.00
Other Add $0.00
Amount Paid $20.00
Change Due $0.00
Refund
Connect
Checkout
Calendar
Notifications
Customers
Checkout
Messages
More


Refund for John Doe
Checkout by: Jamie Bennett
CASH $140.00
CHECK $0.00
GC $0.00
PACKAGE $0.00
IOU $0.00
CREDIT CARD $0.00
VAGARO PAY LATER $0.00
OTHER $0.00
ITEM QTY PRICE DISCOUNT TAX TIP PAID CASH REFUND CREDIT REFUND GC REFUND PACKAGE REFUND VAGARO PAY LATER OTHER IOU REFUND
Women's Haircut 1 $30.00 $0.00 $0.00 $0.00 $30.00 $0.00 $0.00 $0.00 $0.00 $0.00 $0.00 $0.00
Jamie's Beard Oil 1 $100.00 $0.00 $10.00 $0.00 $110.00 $0.00 $0.00 $0.00 $0.00 $0.00 $0.00 $0.00
* Reason for Refund:
Total: $0.00 $0.00 $0.00 $0.00 $0.00 $0.00 $0.00
Email Receipt
Print Receipt
Total Refund: $0.00
Back
Refund

On Desktop:

- Go to the Customers tab at the top of your screen and select the customer's profile.
- Select Refund in the top-right corner.
- Find the transaction to be refunded, then select Refund.
- Select the customer's preferred refund method. (Unavailable methods are grayed out.)
- Enter the full or partial Refund Amount.
- Optionally, if a tip was included, you can enter the Tip refund.
- Select Next or Confirm.
- You can split a refund between two payment methods, such as cash and a gift card, and then select Confirm.

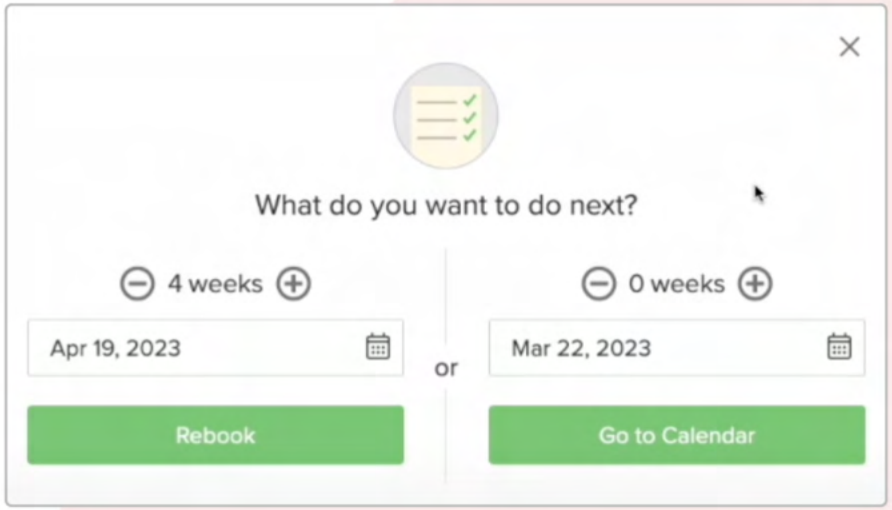
Pro Tip

Make sure to refresh your reports to see a refunded transaction.

Lets Rebook Your First Client!

You can now rebook an appointment directly from checkout.

After completing a transaction from the Checkout Screen, you will be prompted to either rebook the same appointment for the customer or view the Calendar to see availability.



Pro Tip

"Book Again" is now called "Rebook."

Find More Info

info.vagaro.com/schedulicity-welcome