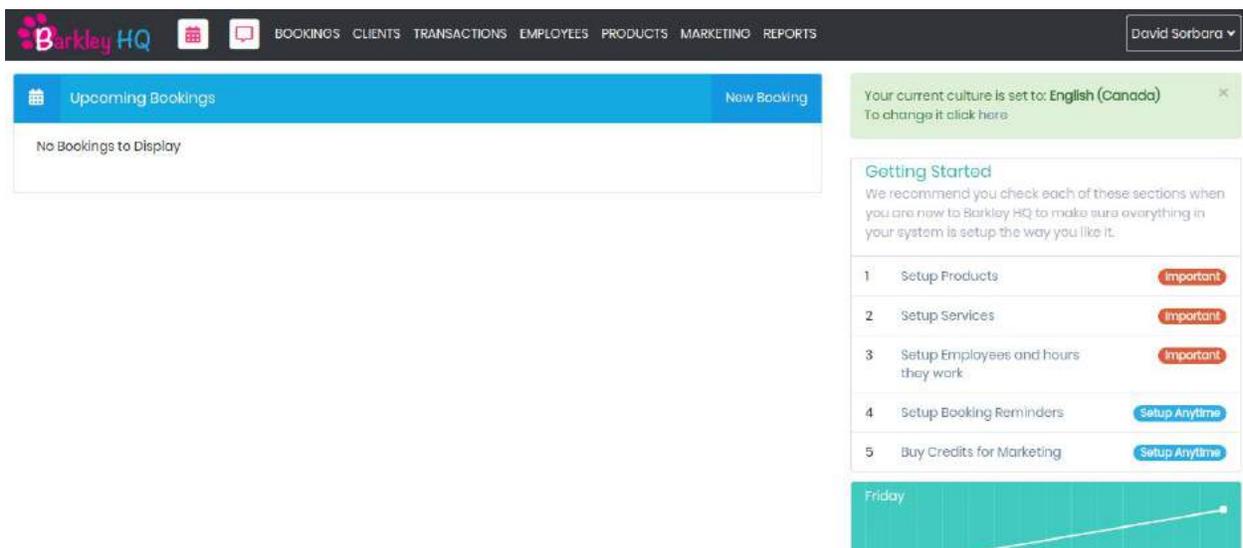




Quick Start Guide

This guide will help you set up your account and get you ready to start using Barkley HQ!

Once you are logged into your account you will automatically be brought to the dashboard. This acts as your home screen so you can see your upcoming bookings and other important details about your business.



Let's begin by accessing the admin portal for your account. To access the admin portal click on your name (top right) and select Admin.

Step 1: Store Setup



- Your Account
- Store Details
- Opening Hours
- Dashboard
- Tags



1a) Click on Store Details and enter in your information. You will have to enter the site details and company details.

The screenshot shows the 'Store Details' form. On the left is a sidebar with a gear icon and the title 'Store Details'. Below the title are two menu items: 'Site Details' (selected) and 'Company Details'. At the bottom of the sidebar are 'Save' and 'Cancel' buttons. The main form area is titled 'Site Details' and contains the following fields:

Region/Timezone	(UTC-05:00) Eastern Time (US & Canada)
Culture	English (Canada)
Site Name	Test Groom Salon
Address	123 street
Address	
Suburb	The City
State	ON
Country	Canada
Postcode	A0A1B1
Phone Number	123-456-7890
Mobile Number	123-654-0987
Email	youremail@email.com
Website Address	http://www.website.com
ABN	0011223344

1b) Once this information is filled out click the Save button. You will be brought back to the admin panel.

1c) Click on opening hours and enter in the day and times your business is open.

The screenshot shows the 'Opening Hours' form. On the left is a sidebar with a gear icon and the title 'Opening Hours'. Below the title is one menu item: 'Opening Hours'. At the bottom of the sidebar are 'Save' and 'Cancel' buttons. The main form area is titled 'Opening Hours' and contains a table for setting business hours:

	Start	Finish	Closed
Sunday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Monday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Tuesday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Wednesday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Thursday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Friday	9:00 AM	5:30 PM	<input type="checkbox"/> No
Saturday	9:00 AM	5:30 PM	<input type="checkbox"/> No

Below the table is a section titled 'Specific Days' with a 'New Day' button.

1d) Once this information is filled out click the Save button. You will now be brought back to the admin panel.



Step 2: Finances



2a) Click on Payment Types. This is where you can edit what types of payments your business can accept.

The screenshot shows a web interface for managing payment types. At the top, there is a blue header with the text 'Search Payment Types' and a search input field. Below the header, there are two buttons: 'New Payment Type' and 'More'. The main content is a table with the following data:

Payment Description	Type		
Cash	Cash		
Cheque	Standard		
Credit Card	Standard		
Electronics Funds Transfer	Standard		
Gift Card	Gift Card		
Loyalty Dollars	Loyalty Dollars		

2b) If you need to add a payment click New Payment Type. Let's add Debit as a payment.

2c) Once you are on the Payment Type screen enter 'Debit' for the description. Type should be set to standard. Open drawer should be set to no. Payment Bankable should be set to yes. Status should be Active. See below.



The screenshot shows a "Payment Type Details" form. On the left, there is a blue sidebar with a "Debit" button (represented by a banknote icon) and a "Profile" section with "Save" and "Cancel" buttons. The main form area contains the following fields:

- Description: Debit
- Type: Standard
- Open Drawer: No
- Payment Bankable: Yes
- Status: Active

2d) Once this information is filled out click the Save button. You will now be brought back to the Payment type screen. You can add another payment type or exit.

2e) Navigate back to the admin panel by clicking your name (top right) and selecting Admin. Scroll back down to finance.



2f) The next thing we need to do is setup your Sales Settings. Do this by clicking Sales Settings under the finance section.

2g) Enter the information and make sure you fill out your tax information correctly.



The image shows two parts of the Barkley HQ interface. On the left is a "Sales Setup" modal window with a gear icon and "Sales Setup" text, containing a "Sales Settings" link and "Save" and "Cancel" buttons. On the right is the "Sales Settings" form with the following fields:

Allow Transaction Voiding	<input type="checkbox"/> Yes
Sales Tax System	Harmonized Sales Tax
Default Tax Rate	13
Allow Deposits	<input type="checkbox"/> No
Currency Symbol	Canadian Dollar: \$
Enable Trading System	<input type="checkbox"/> Disabled

Below the "Enable Trading System" field is the text: "Enable Trading System to declare registers and sales for each day."

2h) Once this information is filled out click the Save button. You will now be brought back to the admin panel.

Step 3: Categories

The Best Way To Setup Your Products & Services

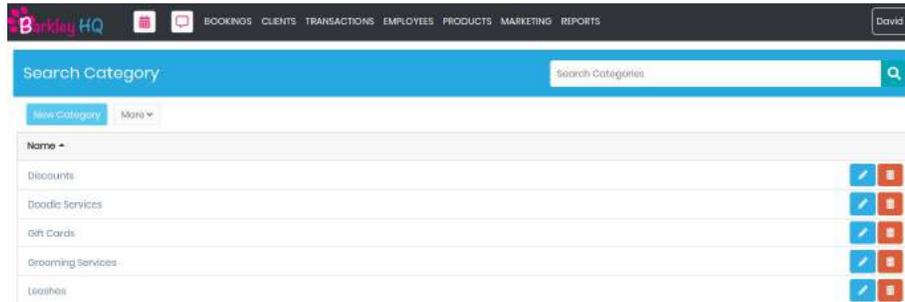
When setting up your products and services on Barkley HQ it is best to start by creating detailed categories. To create a new category follow the steps below.

- 1) Log into Barkley HQ
- 2) Click on your name in the top right corner
- 3) Select Admin
- 4) Look for the Products and Services section
- 5) Select Categories

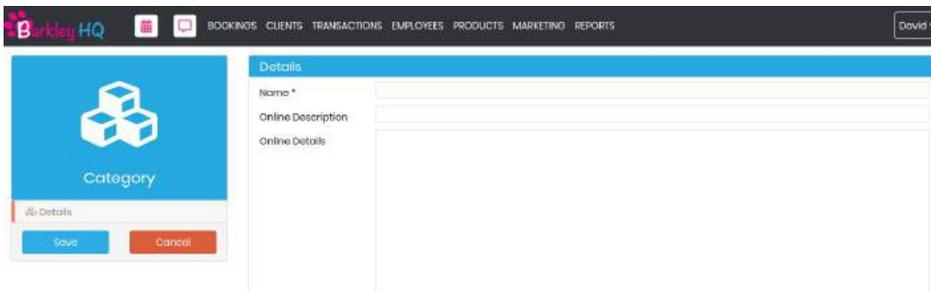




You will be brought to the categories page where you can add a new category, delete a category or edit an existing category. To add a new category follow the steps below.



- 1) Click the blue New Category button
- 2) Enter the name of the Category
- 3) Enter the online description (You can copy and paste the name of the category)
- 4) Enter the online details
- 5) Click Save



Hint: The more categories you enter the better and more organized it is when creating a booking. We recommend at the very minimum you have the following categories: Small Dog Services, Medium Dog Services and Large Dog Services. If you want to get even more detailed you can enter in a specific breed as a category like Doodle Services. The reason you want to have specific categories is so the services under that category will have the correct price and estimated time.

We also recommend you setup a category called Additional Time. Then you will create the following services under the Additional Time category.

- Additional time 15 (Set the time for this service to 15 minutes and put your price)
- Additional time 30 (Set the time for this service to 30 minutes and put your price)
- Additional time 45 (Set the time for this service to 45 minutes and put your price)



Details	
Code *	Acid30Min
Description *	Additional Time 30 Min
Category *	Additional Time Add
Colour	#0d0202 Clear
Status	Active

Times	
Minutes	30 Booking Minutes

Pricing	
Price	18.00
Tax Rate	13.00
Average Cost	0.00

Once you created your categories you have to create the products and services for each category.

Step 3 Continued: Products & Services



- Services
- Products
- Prepaid Services
- Packages
- Categories
- Suppliers
- Understocked

3a) Click on services to add and edit services you offer. Barkley HQ has a list of common groomer services built in. Click on services.



Services				
All Categories		Search Services		
New Product New Service Services More				
Description *	Code	Category	Price	Booking Length
Anal gland cleaning	Anal gland cleaning	Walk in services	\$50.00	60
Bath	Bath	Dog Services	\$50.00	60
Bath	Bath	Dog Services	\$50.00	60
Blow Dry	BlowDry	Dog Services	\$50.00	60
Breath freshener	Breath freshener	Walk in services	\$50.00	60
Brush Out	BrushOut	Dog Services	\$50.00	60
Deshed	Deshed	Dog Services	\$50.00	60
Ear cleaning	EarClean	Walk in services	\$50.00	60

3b) Let's start by editing the services already in Barkley HQ. To do this click on the blue pencil icon beside the service you wish to edit.

Bath

- Details
- Online Bookings
- Resources & Rooms
- Employees
- History
- Loyalty
- Survey Questionnaires

Save | Cancel

Details

Code *

Description *

Category *

Colour

Status

Times

Minutes

Pricing

Price

Tax Rate

Average Cost

3c) Fill out the details of the service, time for the service and pricing for the service correctly.

3d) Click on Online Bookings and fill out if you want this service to be scheduled online. If this is enabled your customers will automatically be able to select this service when scheduling an appointment online.



+

Bath

- [Details](#)
- [Online Bookings](#)
- [Resources & Rooms](#)
- [Employees](#)
- [History](#)
- [Loyalty](#)
- [Survey Questionnaires](#)

Save
Cancel

Online Bookings

Show Online

Online Description
Dog Bath

Service Details

Dog Bath

This setting only is used when you have enabled Online Payments and have selected that you require a Minimum Deposit or Payments are Optional.

3e) Once this information is filled out click Save. You will now be brought back to the Services screen. You will have to repeat steps 3b, 3c, 3d for every service you offer.

3f) To add a new service click on New Service.

Services

All Categories

Search Services

🔍

New Product
New Service
Services
More

Description	Code	Category	Price	Booking Length	
Anal gland cleaning	Anal gland cleaning	Walk in services	\$50.00	60	✎ ✖
Bath	Bath	Dog Services	\$50.00	60	✎ ✖
Bath	Bath	Dog Services	\$50.00	60	✎ ✖
Blow Dry	blowDry	Dog Services	\$50.00	60	✎ ✖
Breath freshener	Breath freshener	Walk in services	\$50.00	60	✎ ✖
Brush Out	BrushOut	Dog Services	\$50.00	60	✎ ✖
Deshed	Deshed	Dog Services	\$50.00	60	✎ ✖
Ear cleaning	EarClean	Walk in services	\$50.00	60	✎ ✖

3g) Enter the details for the service. For code you can enter a number or a short form version of the service.

This screenshot shows the 'Dog Conditioner Treatment' service details form. On the left is a sidebar with a blue header containing a white plus sign and the text 'Dog Conditioner Treatm...'. Below the header is a list of menu items: 'Details', 'Online Bookings', 'Resources & Rooms', 'Employees', 'Loyalty', and 'Survey Questionnaires'. At the bottom of the sidebar are 'Save' and 'Cancel' buttons. The main form area has a blue header 'Details' and contains the following fields: 'Code *' (DogCondition), 'Description *' (Dog Conditioner Treatment), 'Category *' (Dog Services), 'Colour' (empty), and 'Status' (Active). There are 'Add' and 'Clear' buttons next to the 'Category' and 'Colour' fields respectively. Below the 'Details' section is a 'Times' section with a 'Minutes' field set to ':30' and a 'Booking Minutes' label. The 'Pricing' section includes 'Price' (\$ 8.00), 'Tax Rate' (% 13.00), and 'Average Cost' (\$ 0.00).

3h) Click on Online Bookings and fill out if you want this service to be scheduled online. If this is enabled your customers will automatically be able to select this service when scheduling an appointment online.

This screenshot shows the 'Online Bookings' form for the 'Dog Conditioner Treatment' service. The sidebar on the left is identical to the previous screenshot, but the 'Online Bookings' menu item is highlighted. The main form area has a blue header 'Online Bookings' and contains the following fields: 'Show Online' (Yes), 'Online Description' (Dog Conditioner), and 'Service Details' (a text area containing 'Condition your dog.'). Below the 'Service Details' field is a light blue informational box: 'This setting only is used when you have enabled Online Payments and have selected that you require a Minimum Deposit or Payments are Optional.' At the bottom of the form is a 'Yes' button.

3i) Once this information is filled out click on the Save button. You will now be brought back to the services screen. You will have to repeat steps 3f, 3g, 3h for every service you add.

3j) Navigate back to the admin panel by clicking your name (top right) and selecting Admin. Scroll back down to Product and Services.



- Services
- Products
- Prepaid Services
- Packages
- Categories
- Suppliers
- Understocked

3k) Click on Categories.



3l) This is all the categories your business offers. You can add a new category by selecting New Category. Let's add a Dog Product category. Click New Category.

3m) Fill out the information for you new category.

The screenshot shows a modal window titled "Dog Products" with a blue header and a white body. The header contains a white icon of three stacked boxes and the text "Dog Products". Below the header is a "Details" section with a red close button and "Save" and "Cancel" buttons. The main form area has a blue header "Details" and three input fields: "Name *" with the value "Dog Products", "Online Description" with the value "Dog Products", and "Online Details" with the value "Dog Retail Products".

3n) Once the information is filled out click Save. You will be brought back to the Categories screen. Repeat steps 3l, 3m, 3n to add more categories.

3o) Navigate back to the admin panel by clicking your name (top right) and selecting Admin. Scroll back down to Product and Services.



- Services
- Products
- Prepaid Services
- Packages
- Categories
- Suppliers
- Understocked

3p) Click on Products to add a product. This step is only necessary if your business sells retail products.



Products

Description ^	Code	Category	Price	Stock on Hand	
Dog Shampoo	DogShampoo	Dog Services	\$10.00	0	<input type="button" value="edit"/> <input type="button" value="delete"/>

3q) To add a new product click New Product.

3r) Fill out the product details and pricing. The code could be a number or short form description of the product.

Blue Dog Leash

- Details
- Stock Control
- Loyalty

Details

Code *

Description *

Category *

Barcode

Size

Status

Pricing

Price

Tax Rate

Average Cost

3s) Click on stock control to have Barkley HQ manage your inventory levels.

Blue Dog Leash

- Details
- Stock Control
- Loyalty

Stock Control

Allow Sales

Allow Booking

Maintain Stock

Stock on Hand

Stock Change Rea...

Reorder Point

Maximum Level

Paek Quantity

Supplier

Supplier

Supplier Item Code

Supplier Price



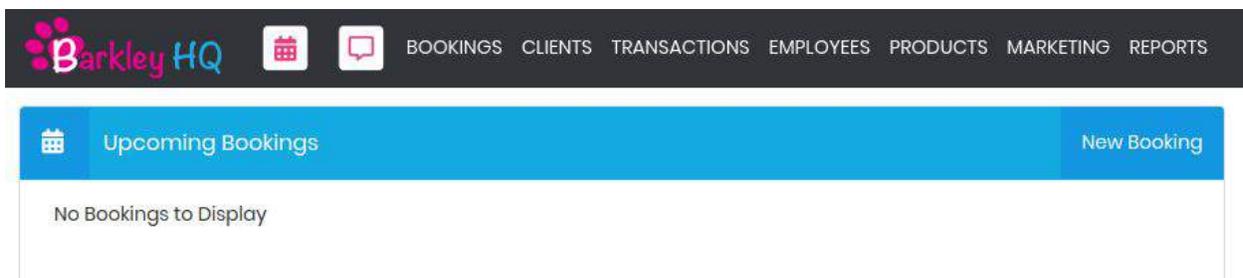
3t) Allow sales should be yes, allow booking should be no (unless you want customers to be able to order this when they book an appointment online), maintain stock should be yes. Fill out your inventory and reorder information. You can also add the supplier.

3u) Once this information is filled out click Save. You will now be brought back to the Products screen. Repeat steps 3q, 3r, 3s, 3t to add more products.

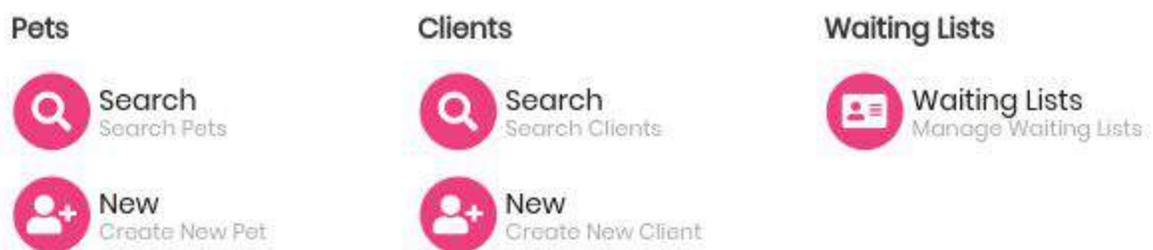
3v) Navigate back to the admin panel by clicking your name (top right) and selecting Admin.

Step 4: Add A Client

4a) To create a new client click on the Clients tab on the top toolbar.



4b) Click on New - Create new client.



4c) Fill out the Contact Details.

A screenshot of a client profile form. On the left is a sidebar with a profile picture placeholder and the name "Mark Blue". Below the name are menu items: Profile, Pets, Questionnaire, Communications, and Custom. At the bottom of the sidebar are "Save" and "Cancel" buttons. The main form area is titled "Contact Details" and "Client Mode". It contains fields for Name (Mark Blue), Phone Number (123-456-7880), Mobile Number (321-654-0987), Work Number, Email Address (mark@noemail.com), Address (123 Faker Street), Address (Unit 5), Suburb (Toronto), State (ON), and Postcode (A0A1B1). Below this is a "Personal Details" section with a "Birth Date" field and a "Year" dropdown menu.

4d) Click Save once the Contact Details, Personal Details and Other Details are filled out correctly.

4e) You will be brought back to the Search Clients screen.

4f) To add another client click on New Client and repeat steps 4c, 4d, 4e.

Step 5: Add A Pet

5a) To add a new pet click on the Clients tab on the top toolbar.

A screenshot of the "Upcoming Bookings" screen. At the top is a dark navigation bar with the Barkley HQ logo and icons for a calendar and a chat bubble. To the right of these icons are menu items: BOOKINGS, CLIENTS, TRANSACTIONS, EMPLOYEES, PRODUCTS, MARKETING, and REPORTS. Below the navigation bar is a blue header with a calendar icon, the text "Upcoming Bookings", and a "New Booking" button. The main content area is white and contains the text "No Bookings to Display".

5b) Under pets select New - Create New Pet.



Pets

 Search
Search Pets

 New
Create New Pet

Clients

 Search
Search Clients

 New
Create New Client

Waiting Lists

 Waiting Lists
Manage Waiting Lists

5c) Start typing in the Owners name (owner must be entered before pet). The owners name should appear in the drop down.

Pet Details	
Owner *	Mar
	Mark Blue - 123-456-7890 - 321-654-0987

5d) Fill out the Pet Details.

Pet Details	
Owner *	Mark Blue
Name *	Rover
Type	Dog
Breed	Golden Retriever
Sex	Male
Colour	Yellow
Weight	35
Birth Date	February 7 2014
Temper	Tame
Muzzle	No
Cage Lead	No
Rego Number	Optional
MicroChip Number	123456


Rover

 Pet Profile

5e) Once the Pet Details is filled out click Save.

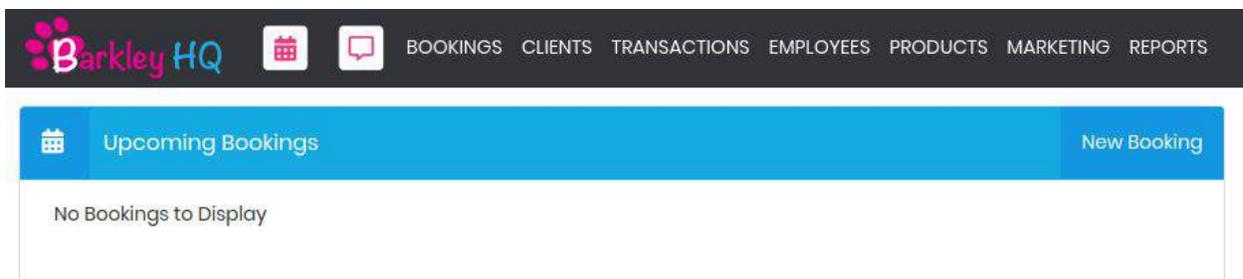


5f) You will now be brought back to the Search Pets screen.

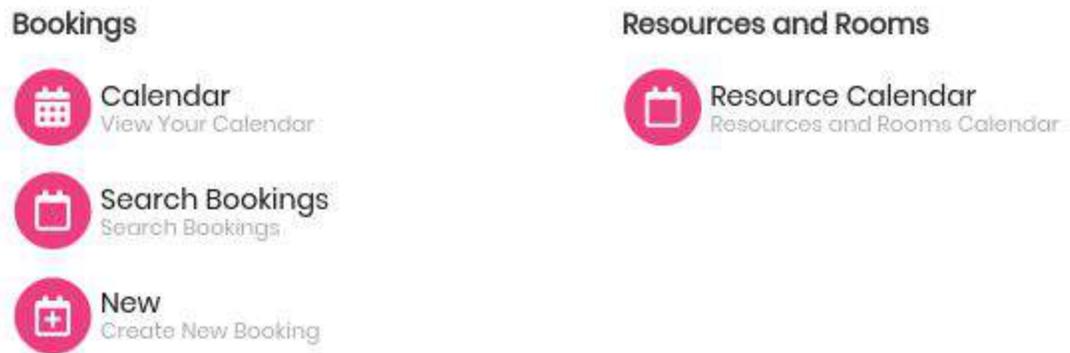
5g) To add another pet click New Pet and repeat steps 5c, 5d, 5e.

Step 6: Bookings

6a) To create a new booking click on the Bookings tab on the top toolbar.



6b) Under Bookings click New - Create New Booking.



6c) Fill out the Client Details and Pet Name (These fields should auto populate if the client is already in the system). Click Next.



Client Details

Client: Mark Blue
Phone Number: 123-456-7890
Mobile Number: 321-654-0987
Email Address: mark@noemail.com
Pet Name: Rover

Previous Services

Date	Performed By	Description	Value	Rebook
No Previous Services to display				

Close Previous Next Save

6d) Select the service the client wishes to book. Click Next.

Select Service

Employee: David Sorbara
Category: Dog Services
Service: Dog Conditioner Treatment [30] Add

Selected Services

Description	Time	Price	
Dog Conditioner Treatment	30 mins	8.00	 

Estimated Time 30 minutes

Close Previous Next Save

6e) Select the Employee and Time the client wants to book. Click Next.



The screenshot shows the 'Select Time' form. On the left is a sidebar with a calendar icon and the name 'Mark Blue'. Below the icon are four menu items: 1 Client Details, 2 Services, 3 Time and Employee (highlighted), and 4 Comments. The main form has the following fields: Employee (David Sorbara), Date (Thursday, February 7, 2019), Time (4:30 PM), and Recurring Booking (No). At the bottom right are buttons for Close, Previous, Next, and Save.

6f) Add any comments or notes you want to remember. Click Save.

The screenshot shows the 'Comments' form. The sidebar is identical to the previous screenshot, but the 'Comments' menu item is highlighted. The main form has a large text area containing the text 'Rover is hyper,'. Below the text area is a table with two columns: 'Previous Booking Date' and 'Comment'. The table is currently empty, showing 'No comments to display'. At the bottom right are buttons for Close, Previous, Next, and Save.

6g) You will now be brought back to your Calendar View.

6h) To add a new booking repeat steps 6c, 6d, 6e, 6f, 6g.

Step 7: Transactions

7a) To complete a transactions click on the Transactions tab in the top toolbar.



[BOOKINGS](#) [CLIENTS](#) [TRANSACTIONS](#) [EMPLOYEES](#) [PRODUCTS](#) [MARKETING](#) [REPORTS](#)

Upcoming Bookings [New Booking](#)

No Bookings to Display

7b) Under Sales click on Cash Sale - New Cash Sale

Sales <ul style="list-style-type: none"> Cash Sale New Cash Sale Cash Refund New Cash Refund Exchange New Exchange	Orders <ul style="list-style-type: none"> View View Orders Purchase Order Create Purchase Order Receive Goods Receive Goods	Transactions <ul style="list-style-type: none"> Trading Start/End Trading Day Search Search Transactions Search Search Payments Cash Drawer Open Cash Drawer
Stock <ul style="list-style-type: none"> Write On Write On Product Write Off Write Off Product	Petty Cash <ul style="list-style-type: none"> Petty Cash Create New Petty Cash	

7c) Fill out the information for the sale. The client should auto populate if they are already in the system.

7d) You can edit the details of the sale by clicking on the blue pencil icon.

7e) To add a payment click on the + button.



Barkley HQ BOOKINGS CLIENTS TRANSACTIONS EMPLOYEES PRODUCTS MARKETING REPORTS

Cash Sale - 501830

Mark Blue David Sorbara

Code/Description	Qty	Price	Total
<input type="text"/>	1	0.00	
Blue Dog Leash Assisted By David Sorbara	1	12.00	12.00
		Harmonized S...	1.56
		Total	13.56

Payment	Value
Cash	13.56
<input type="text"/>	0.00
Amount Due	0.00

Discounts Sell Gift Card **Complete** Cancel

7f) Click on complete. You will now be brought to the Receipt screen.

Cash Sale - 501830 COMPLETE

Mark Blue
123 Faker Street Unit 5
Toronto ON A0A1B1
321-654-0987
123-456-7890
mark@noemail.com

Entered By: David Sorbara
2019-02-07

Code	Description	Value	Qty	Total
BlueLeash	Blue Dog Leash Assisted By David Sorbara	\$12.00	1	\$12.00

Total: \$13.56

Harmonized Sales Tax : \$1.56

Cash: \$13.56

Change Due: \$0.00

929786

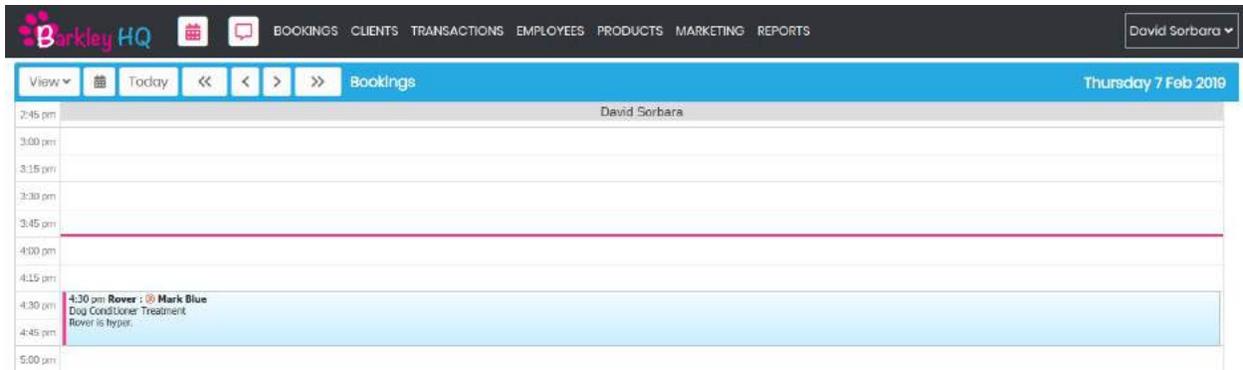


7g) You can email or print the receipt for your clients. Click Close when finished.

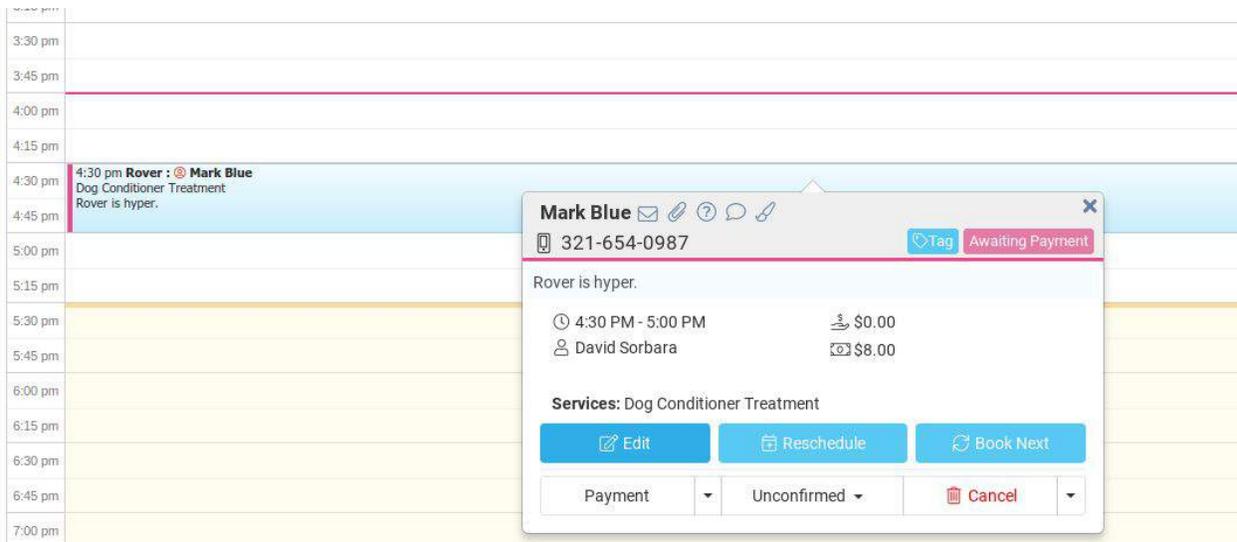
7h) You will now be brought back to your Calendar View.

Step 8: How To Complete A Booking

8a) To complete a booking click on the Calendar in the top toolbar to bring you to your Calendar View.



8b) Click on the booking you wish to complete.



8c) Click on Payment. You will now be brought to the Booking Payment screen.



Barkley HQ BOOKINGS CLIENTS TRANSACTIONS EMPLOYEES PRODUCTS MARKETING REPORTS David Sorbara

Booking Payment - 501831

Mark Blue David Sorbara

Code/Description	Qty	Price	Total
Search Item	1	0.00	
Dog Conditioner Treatment Performed By David sorbara	1	8.00	8.00
		Harmonized S...	1.04
		Total	9.04

Payment	Value
Cash	9.04
	Amount Due 9.04

Discounts Sell Gift Card Complete Cancel

8d) Make sure all the booking details are correct. Add what type of Payment they are using and click the + button to add payment.

8e) Click on Complete. You will now be brought to the Receipt screen.

8f) You can print or email the receipt to your clients. Click Close when finished.

8g) You will now be brought back to your Calendar View.