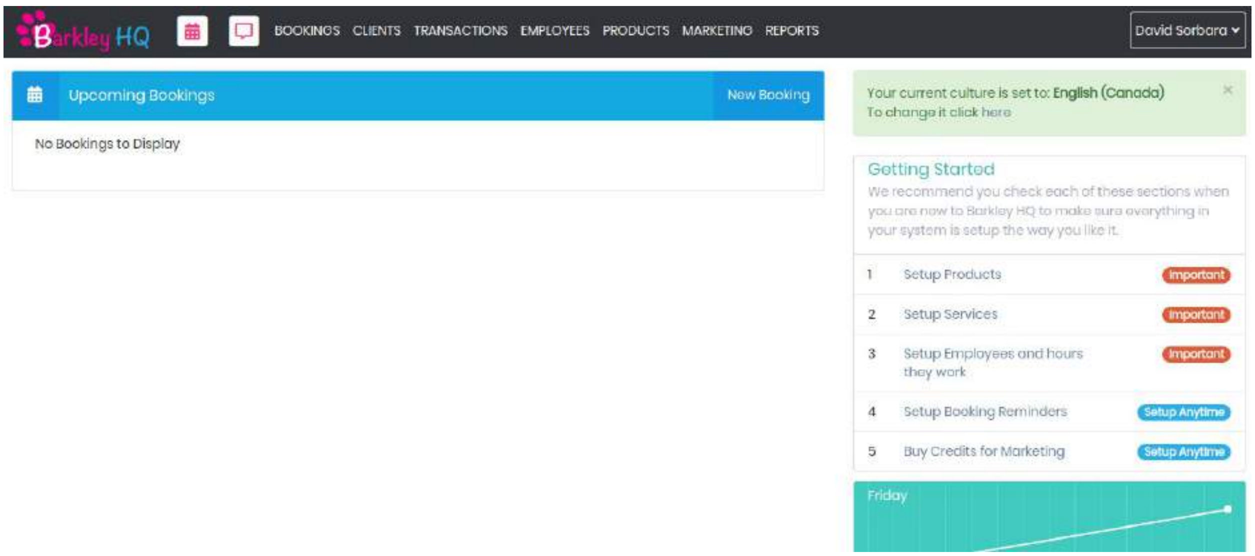
Quick Start Guide

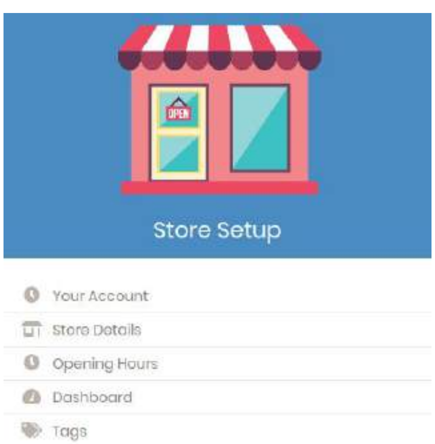
This guide will help you set up your account and get you ready to start using Barkley HQ!

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.

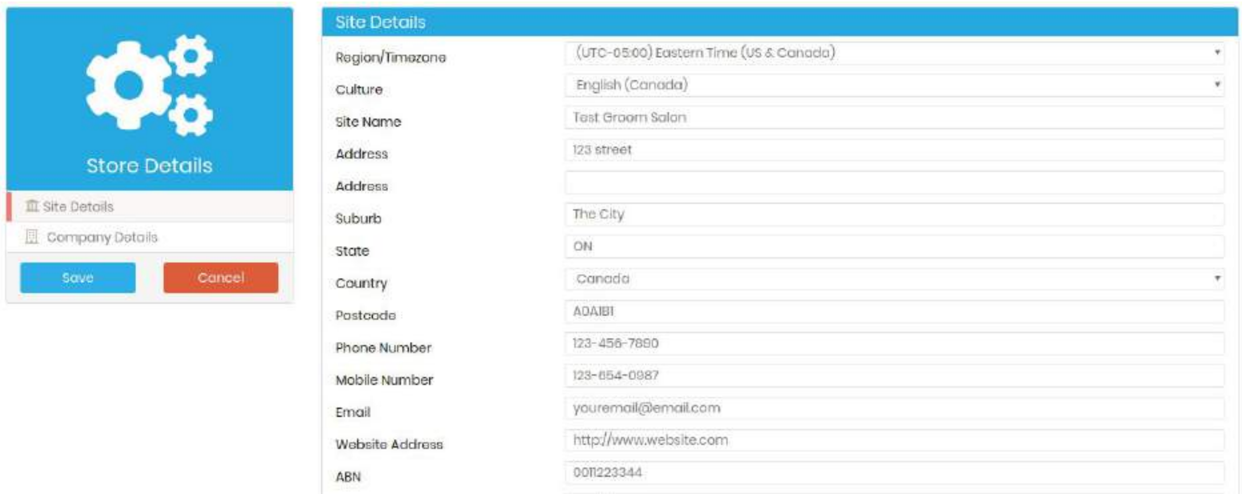


Let's begin by accessing the admin portal for your account. To access the admin portal click on your name (top right) and select Admin.

Step 1: Store Setup

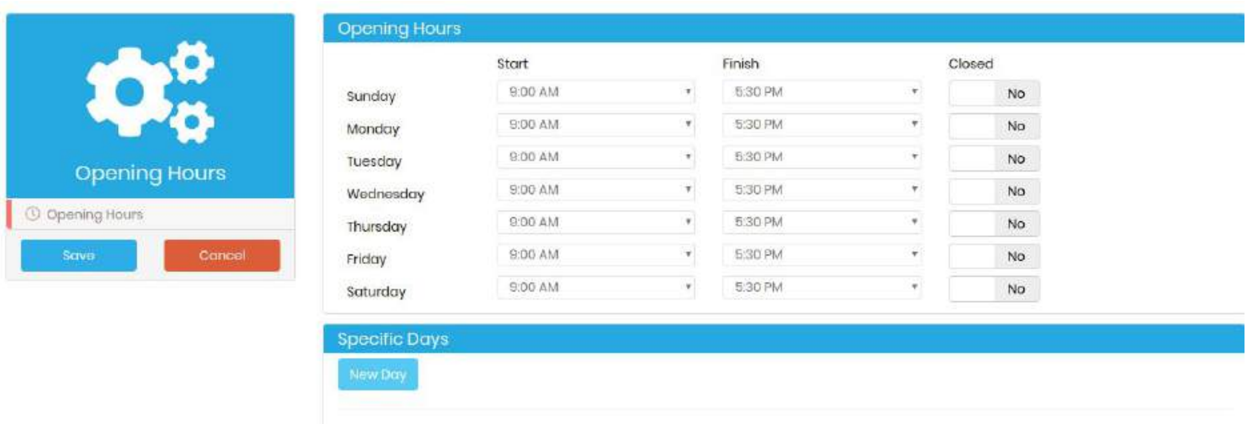


1a) Click on Store Details and enter in your information. You will have to enter the site details and company details.



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

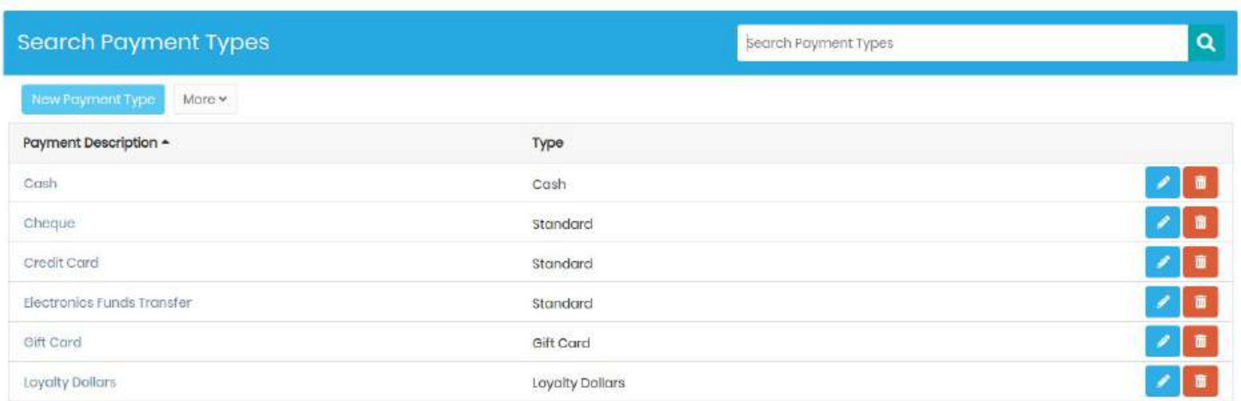
1c) Click on opening hours and enter in the day and times your business is open.



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

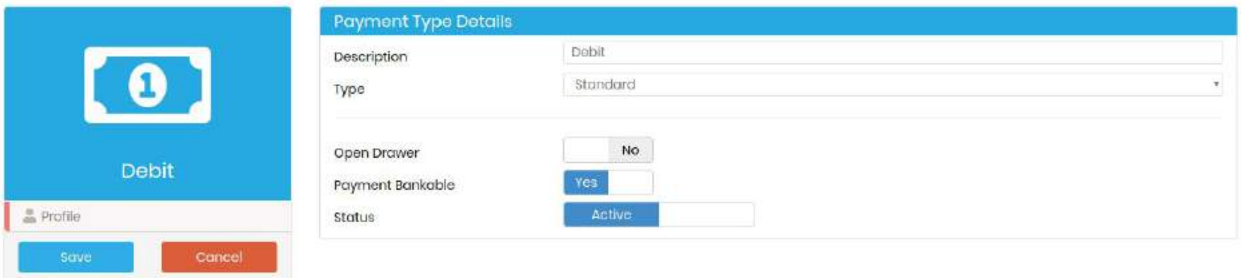
Step 2: Finances

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



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.

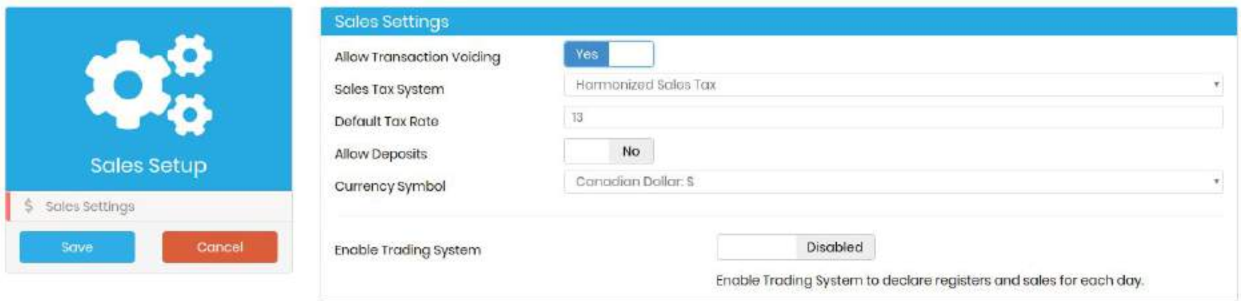


2d) Once this information is filled out click the Save button. You will now be brought back to the Payment type screen. You can add another payment type or exit.

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.



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

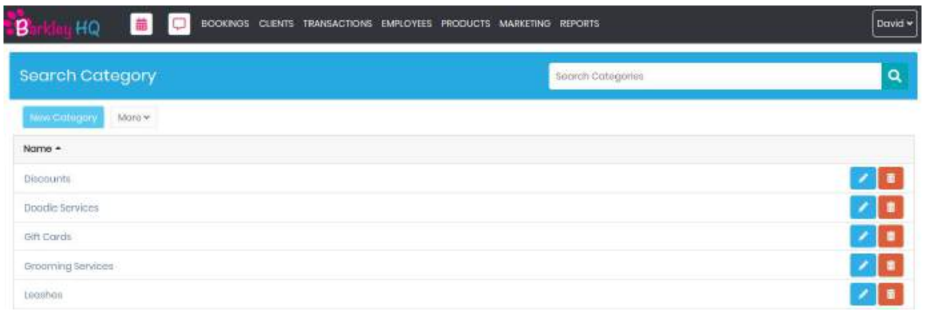
Step 3: Categories

The Best Way To Setup Your Products & Services

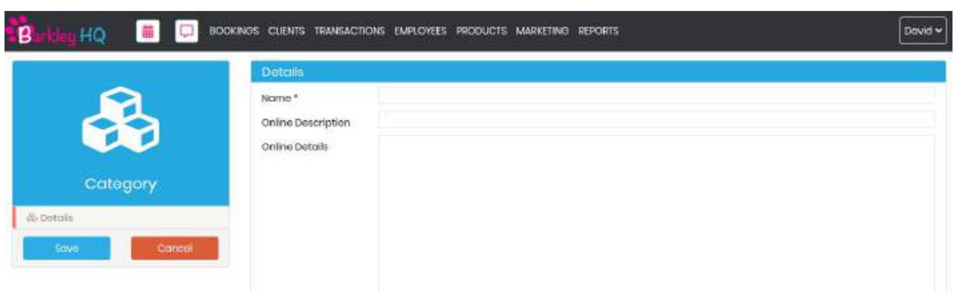
When setting up your products and services on Barkley HQ it is best to start by creating detailed categories. To create a new category follow the steps below.

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.

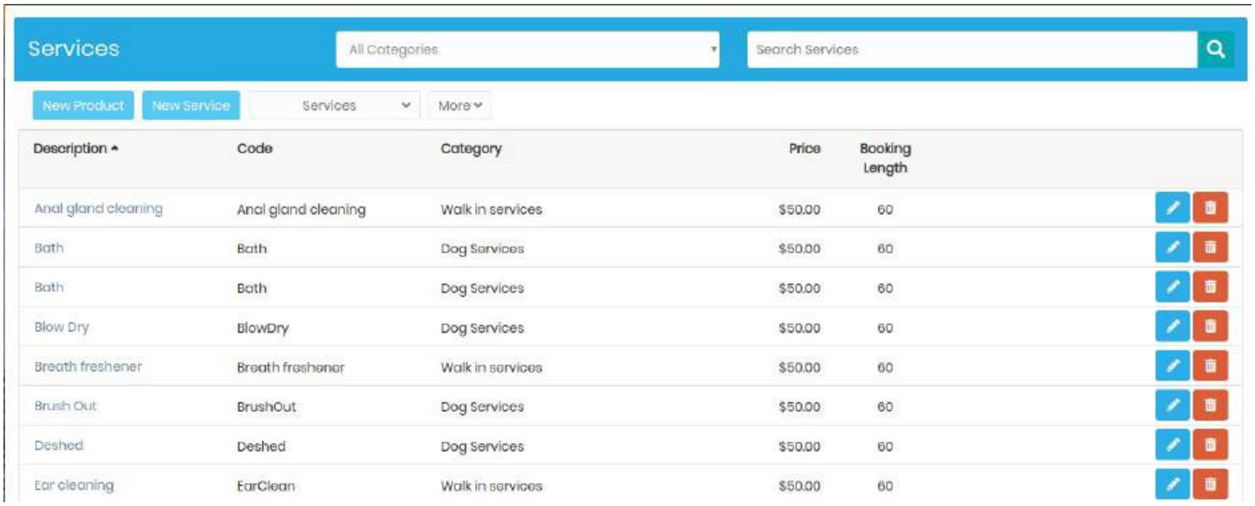
- Additional time 15 (Set the time for this service to 15 minutes and put your price)
- Additional time 30 (Set the time for this service to 30 minutes and put your price)
- Additional time 45 (Set the time for this service to 45 minutes and put your price)

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

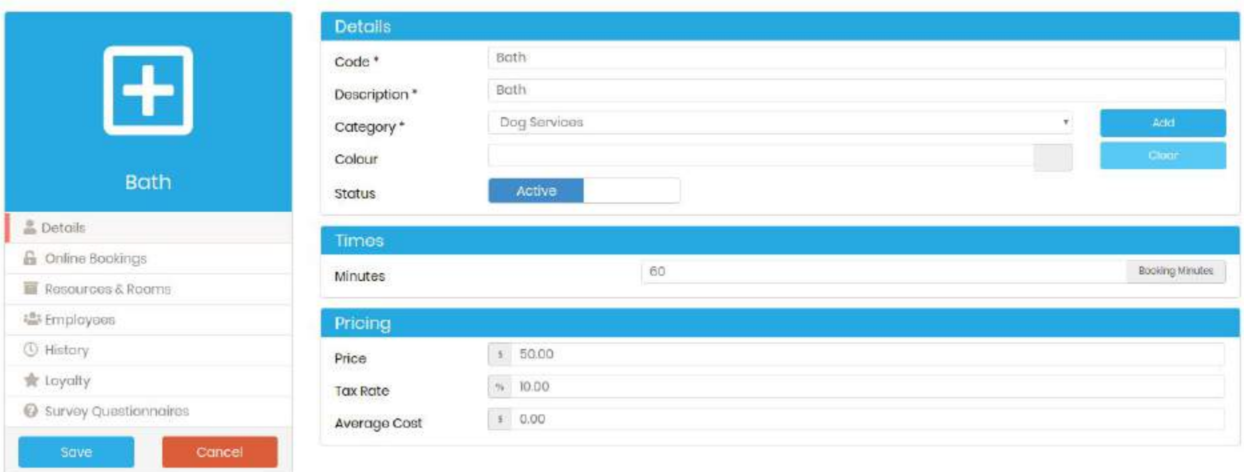
Step 3 Continued: Products & Services

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.

Barkley HQ

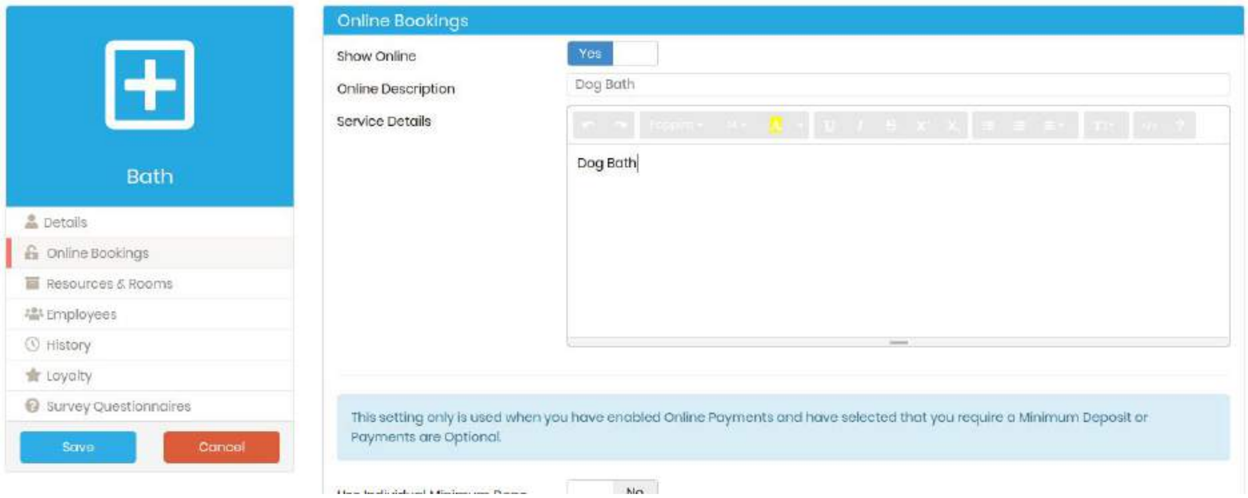


3b) Let's start by editing the services already in Barkley HQ. To do this click on the blue pencil icon beside the service you wish to edit.



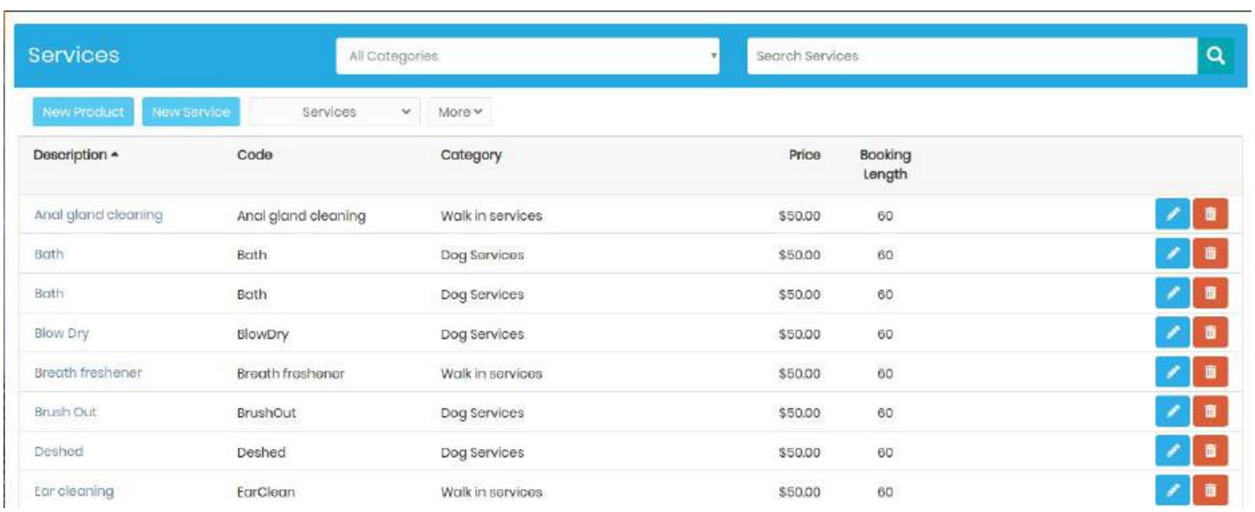
3c) Fill out the details of the service, time for the service and pricing for the service correctly.

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.

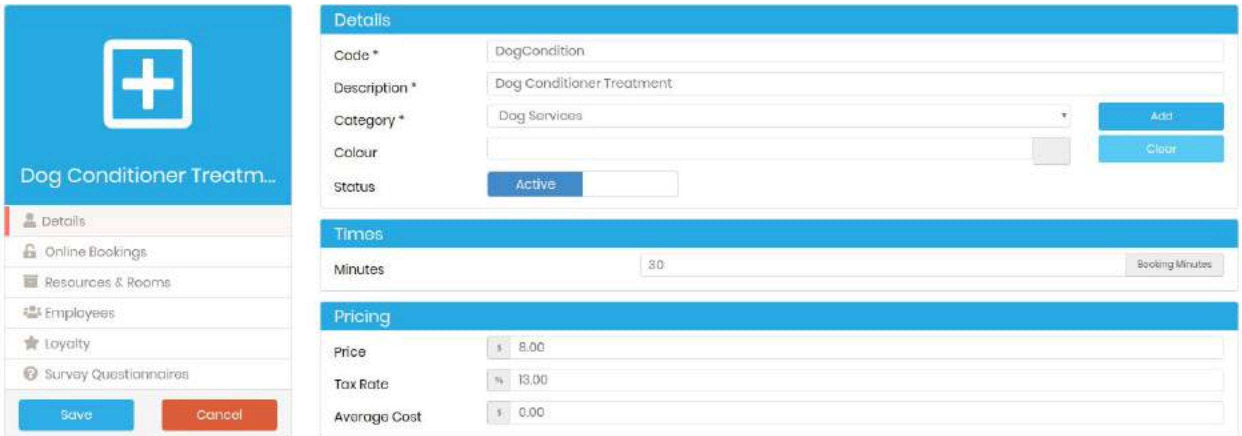


3e) Once this information is filled out click Save. You will now be brought back to the Services screen. You will have to repeat steps 3b, 3c, 3d for every service you offer.

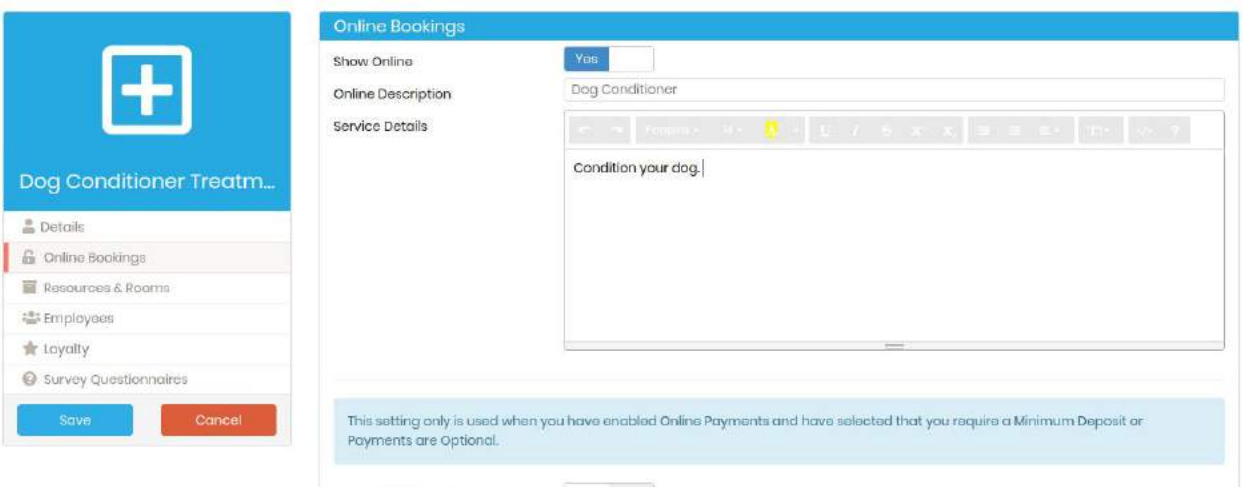
3f) To add a new service click on New Service.



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



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.



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.

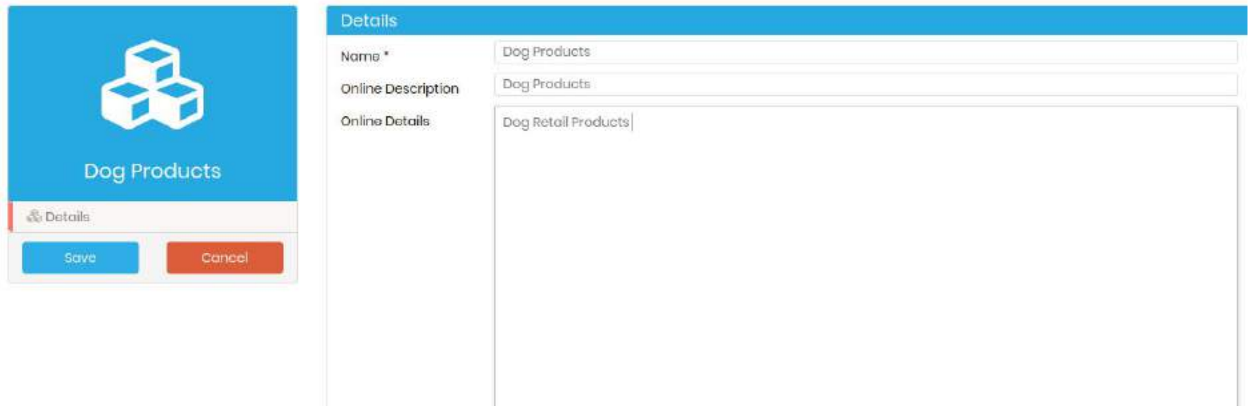
3j) Navigate back to the admin panel by clicking your name (top right) and selecting Admin. Scroll back down to Product and Services.

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.

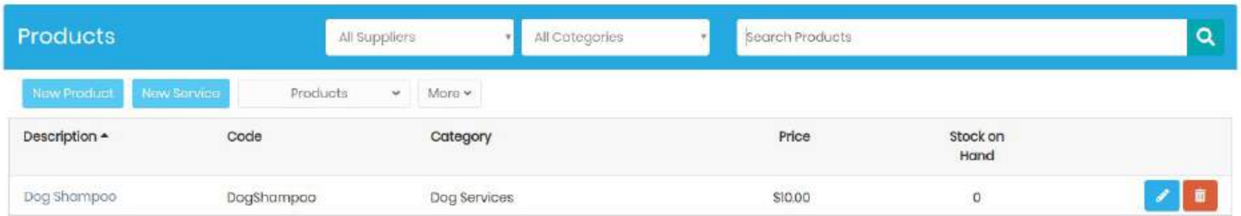
Barkley HQ



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.

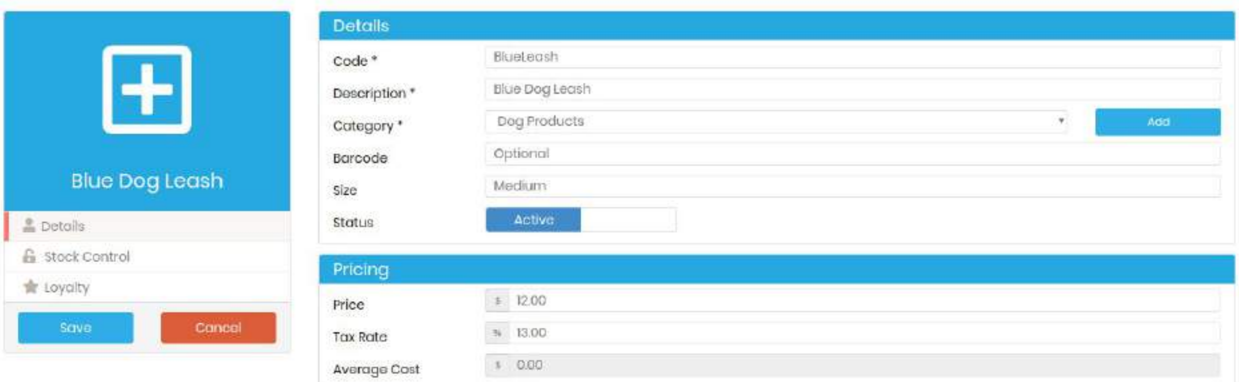
3o) Navigate back to the admin panel by clicking your name (top right) and selecting Admin. Scroll back down to Product and Services.

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

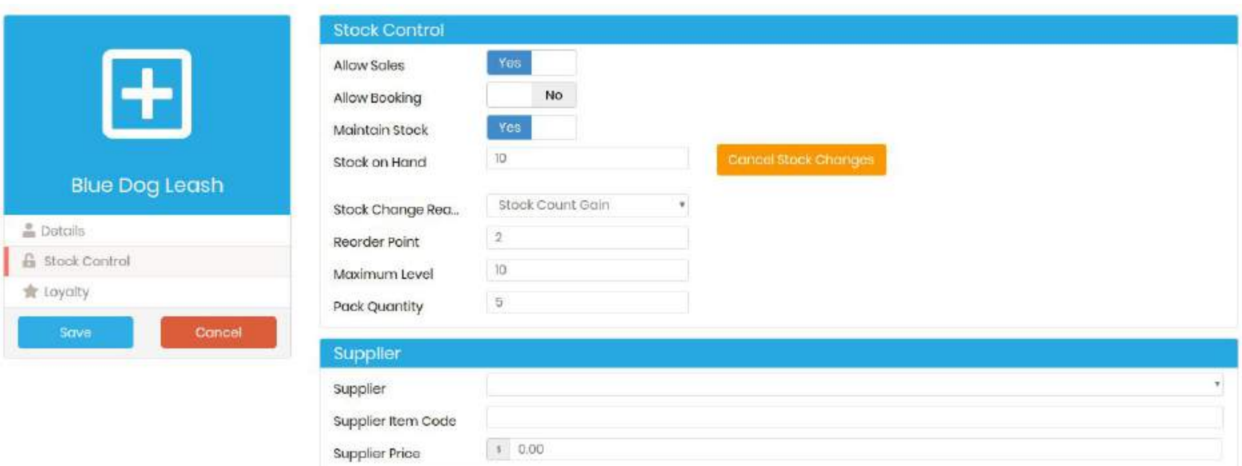


3q) To add a new product click New Product.

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



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



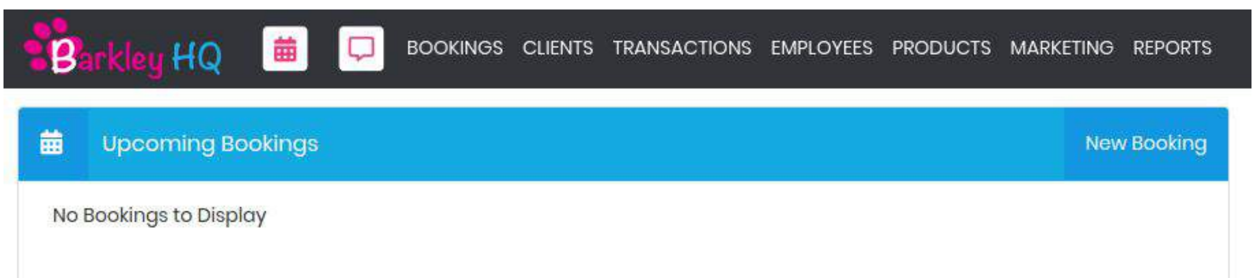
3t) Allow sales should be yes, allow booking should be no (unless you want customers to be able to order this when they book an appointment online), maintain stock should be yes. Fill out your inventory and reorder information. You can also add the supplier.

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.

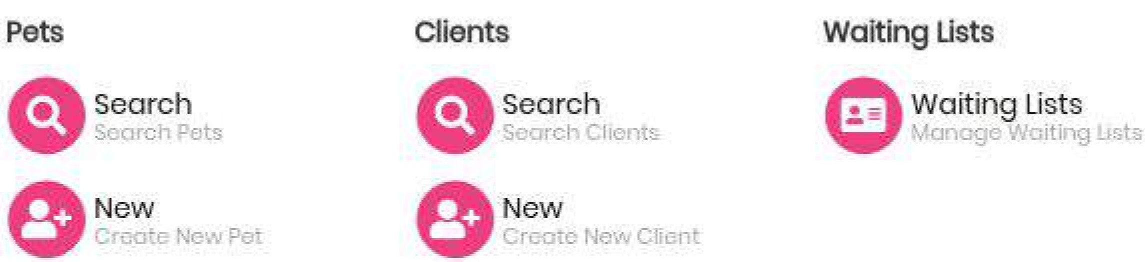
3v) Navigate back to the admin panel by clicking your name (top right) and selecting Admin.

Step 4: Add A Client

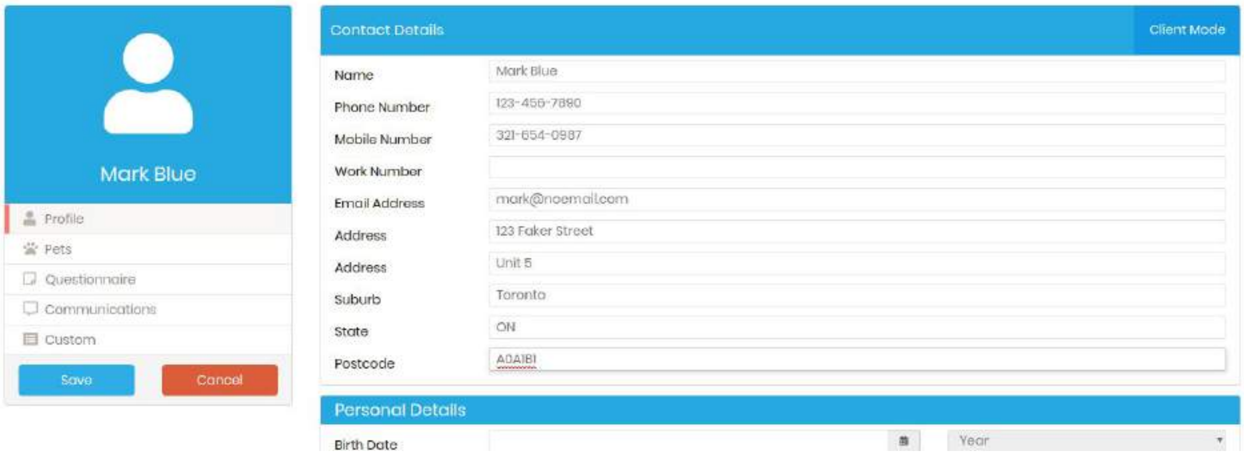
4a) To create a new client click on the Clients tab on the top toolbar.



4b) Click on New - Create new client.



4c) Fill out the Contact Details.



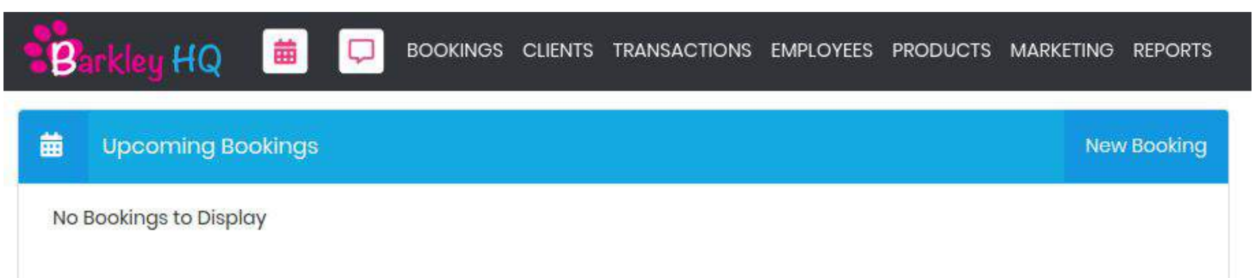
4d) Click Save once the Contact Details, Personal Details and Other Details are filled out correctly.

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

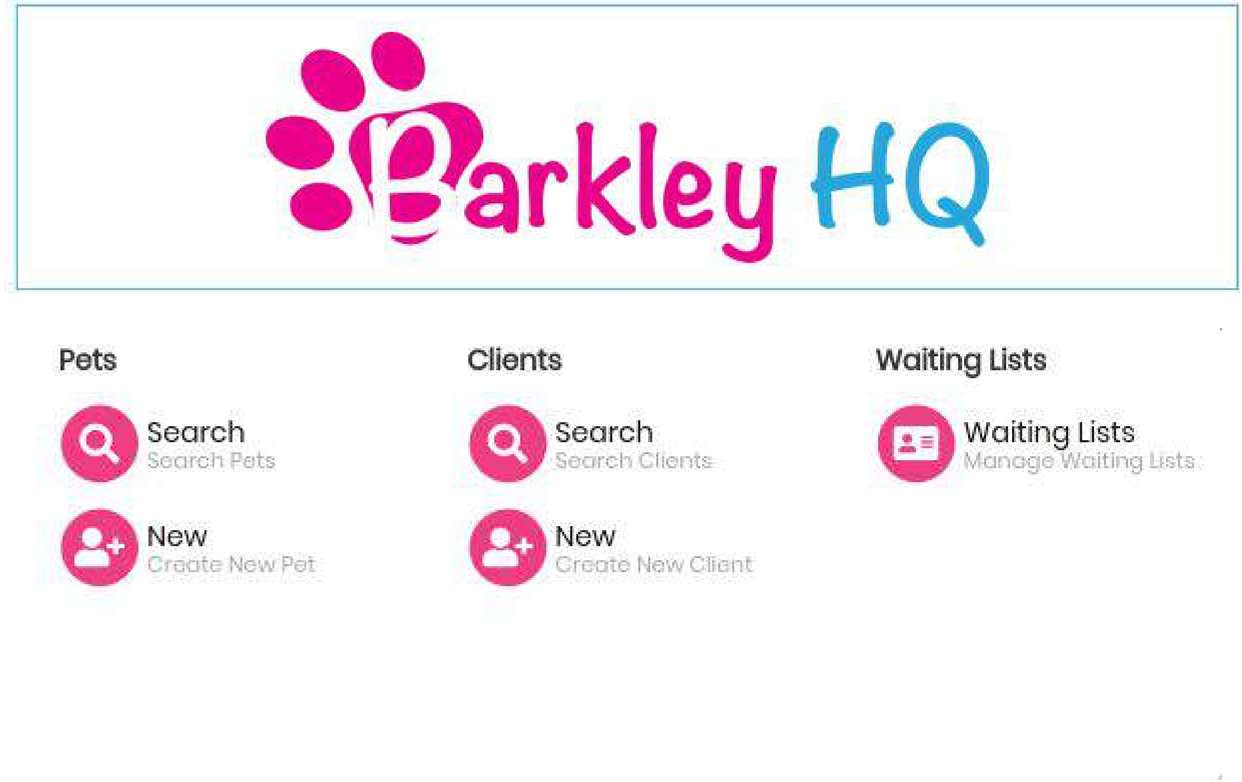
4f) To add another client click on New Client and repeat steps 4c, 4d, 4e.

Step 5: Add A Pet

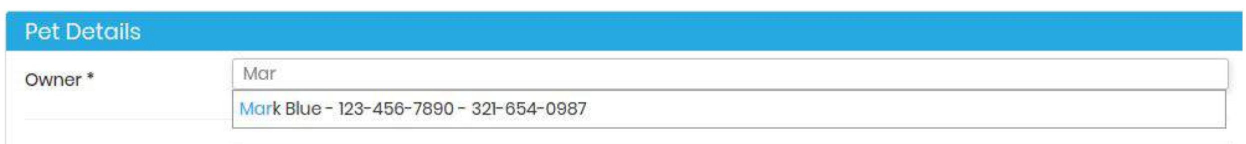
5a) To add a new pet click on the Clients tab on the top toolbar.



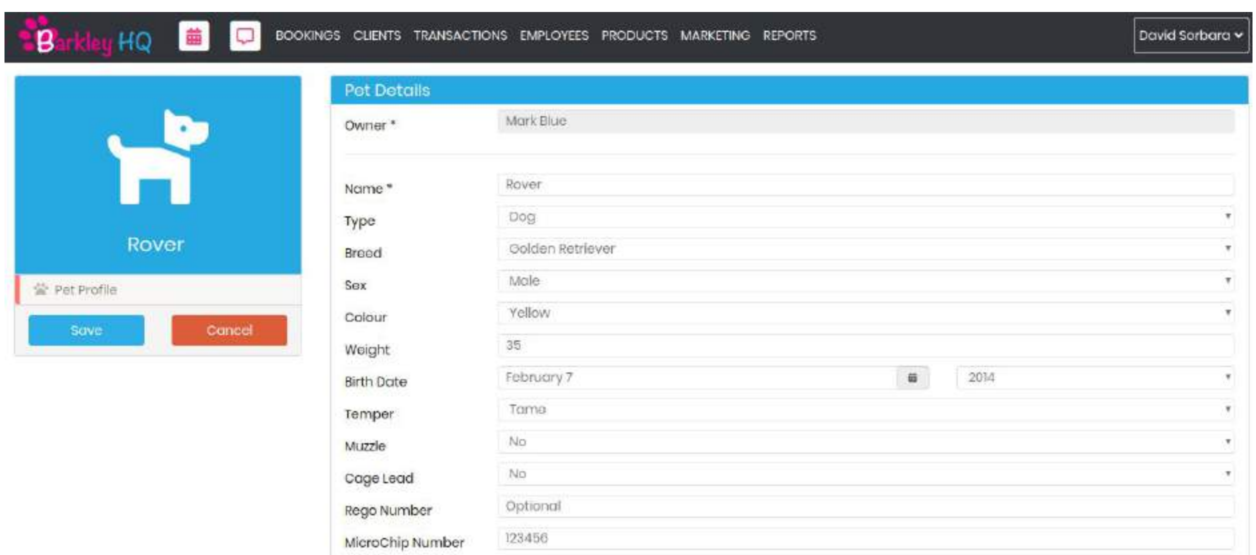
5b) Under pets select New - Create New Pet.



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



5d) Fill out the Pet Details.



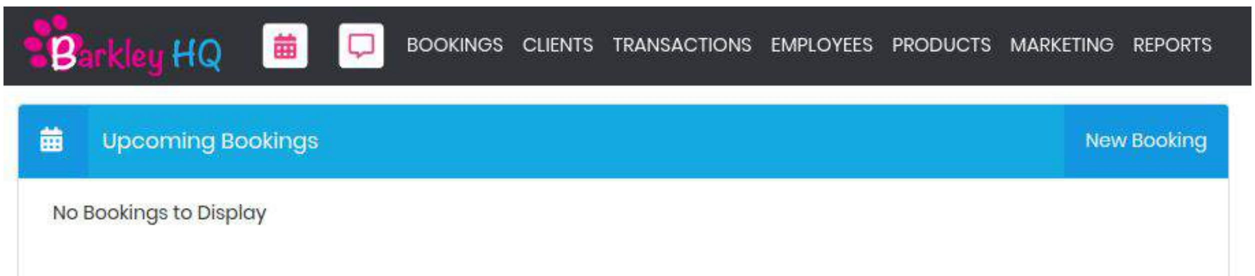
5e) Once the Pet Details is filled out click Save.

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

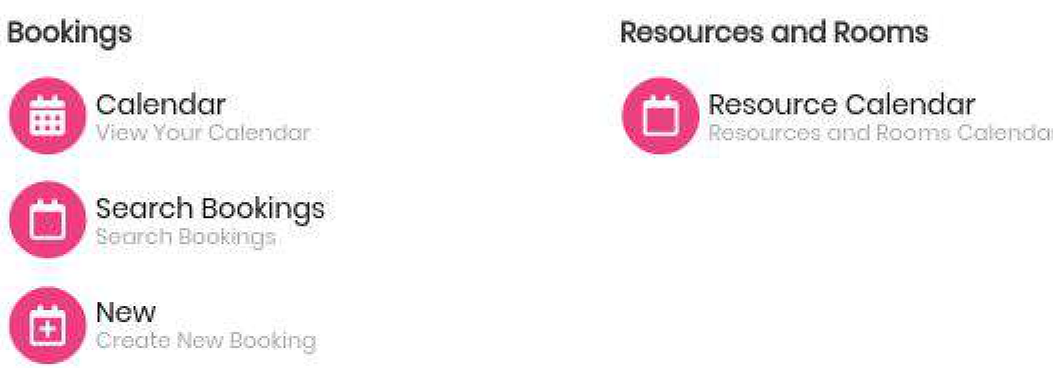
5g) To add another pet click New Pet and repeat steps 5c, 5d, 5e.

Step 6: Bookings

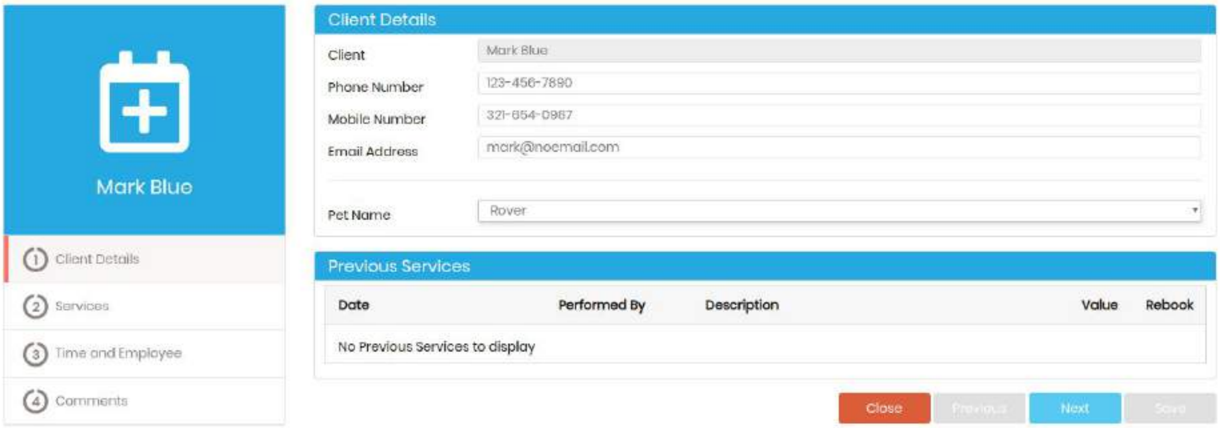
6a) To create a new booking click on the Bookings tab on the top toolbar.



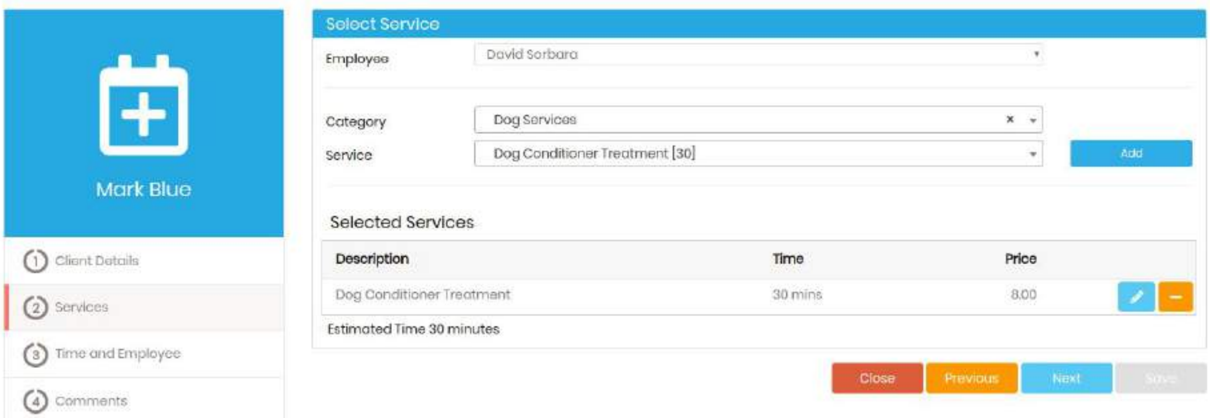
6b) Under Bookings click New - Create New Booking.



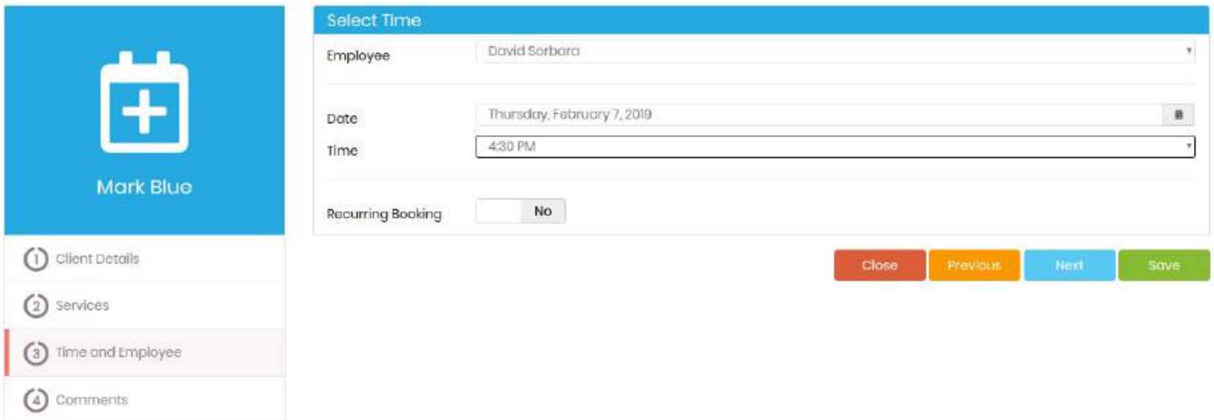
6c) Fill out the Client Details and Pet Name (These fields should auto populate if the client is already in the system). Click Next.



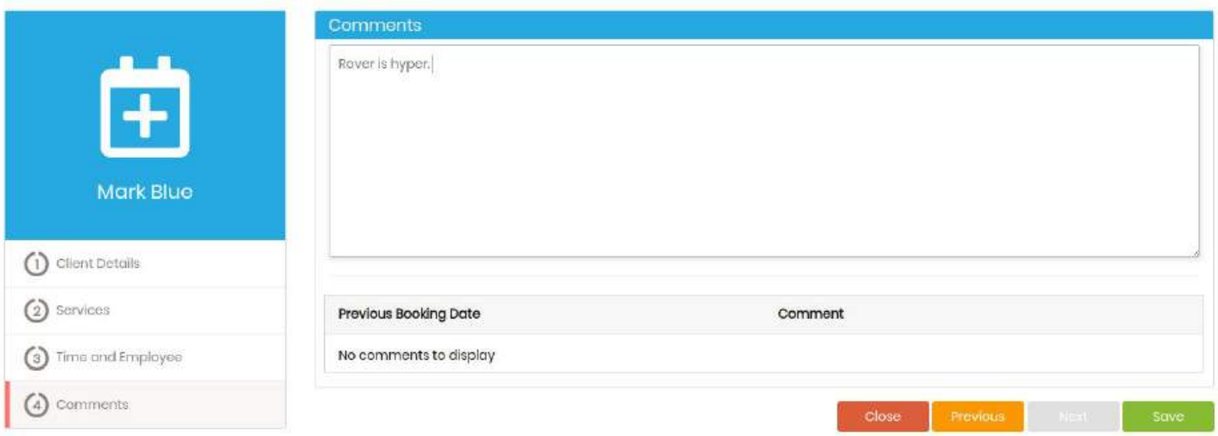
6d) Select the service the client wishes to book. Click Next.



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



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

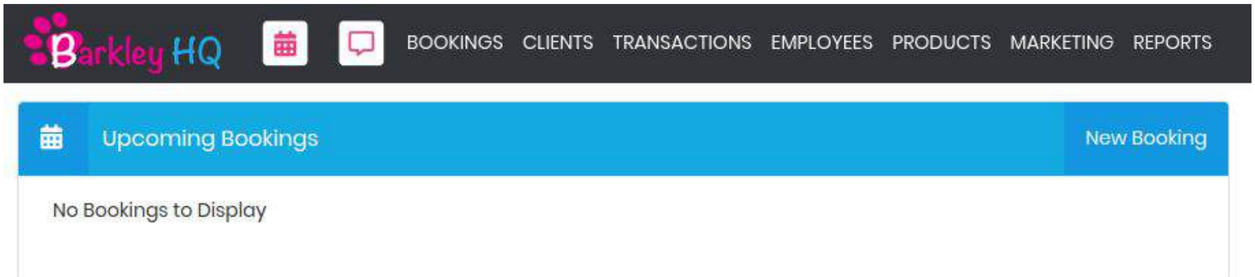


6g) You will now be brought back to your Calendar View.

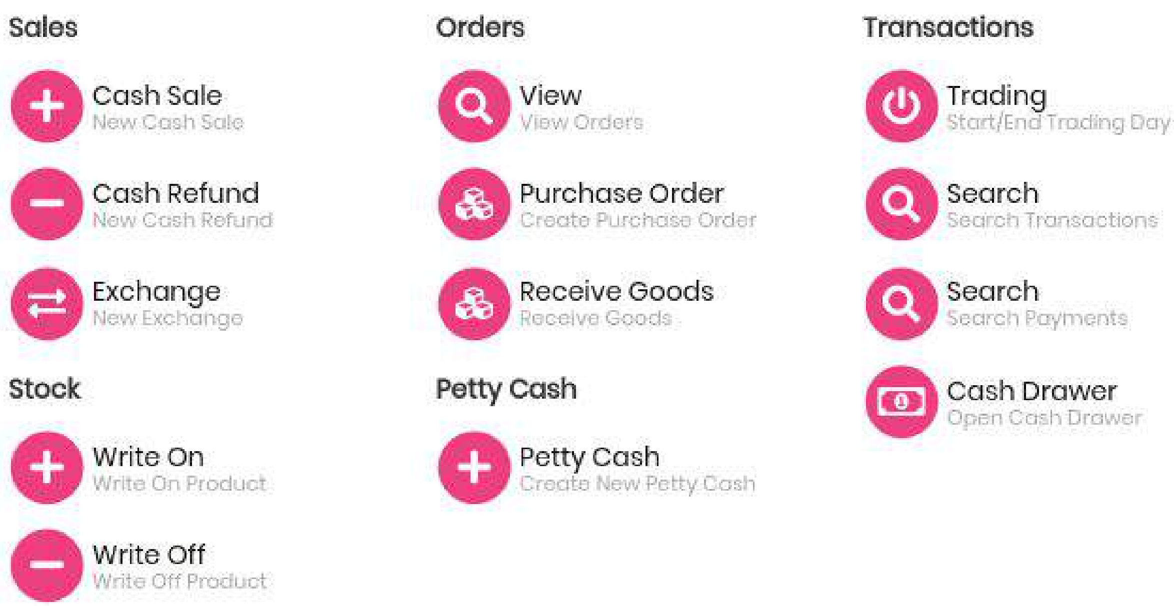
6h) To add a new booking repeat steps 6c, 6d, 6e, 6f, 6g.

Step 7: Transactions

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



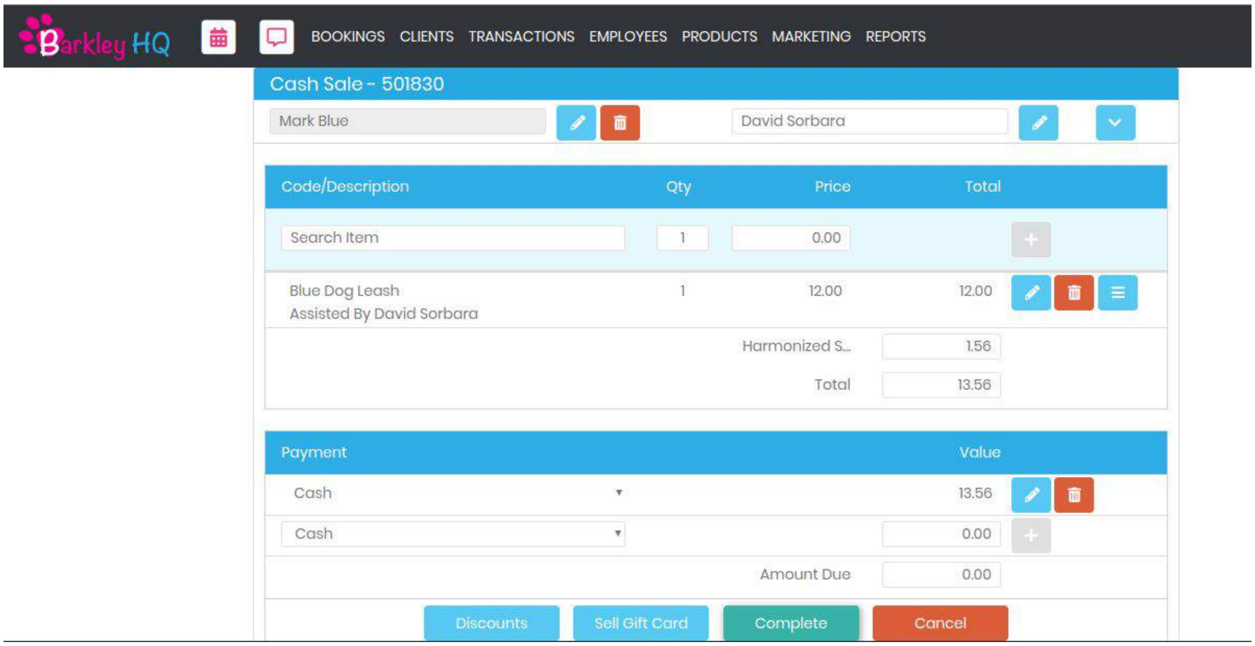
7b) Under Sales click on Cash Sale - New Cash Sale



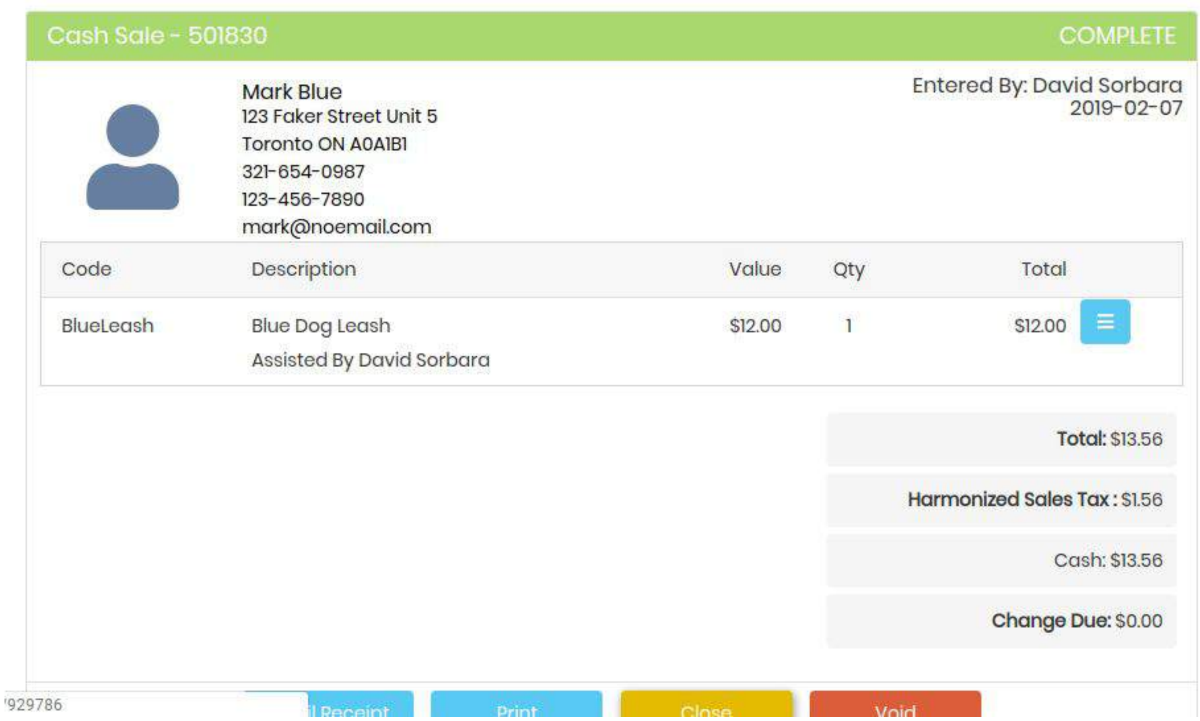
7c) Fill out the information for the sale. The client should auto populate if they are already in the system.

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.



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

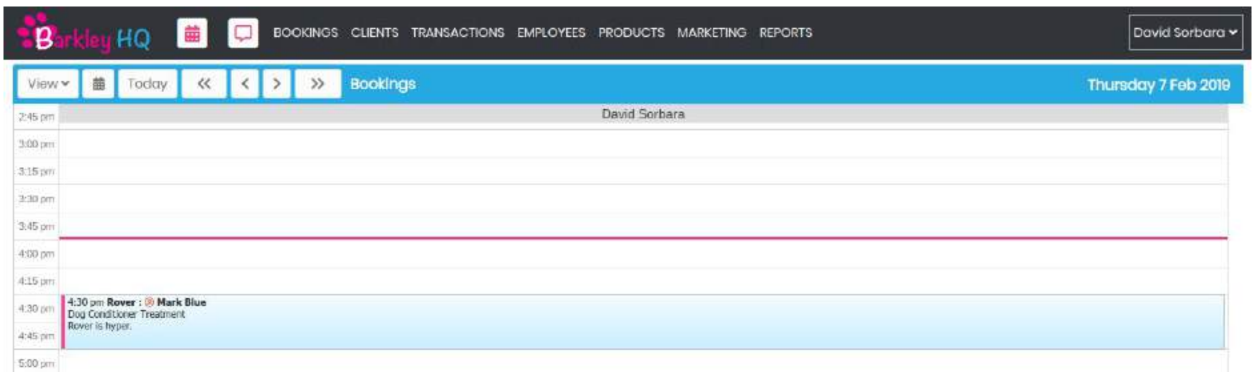


7g) You can email or print the receipt for your clients. Click Close when finished.

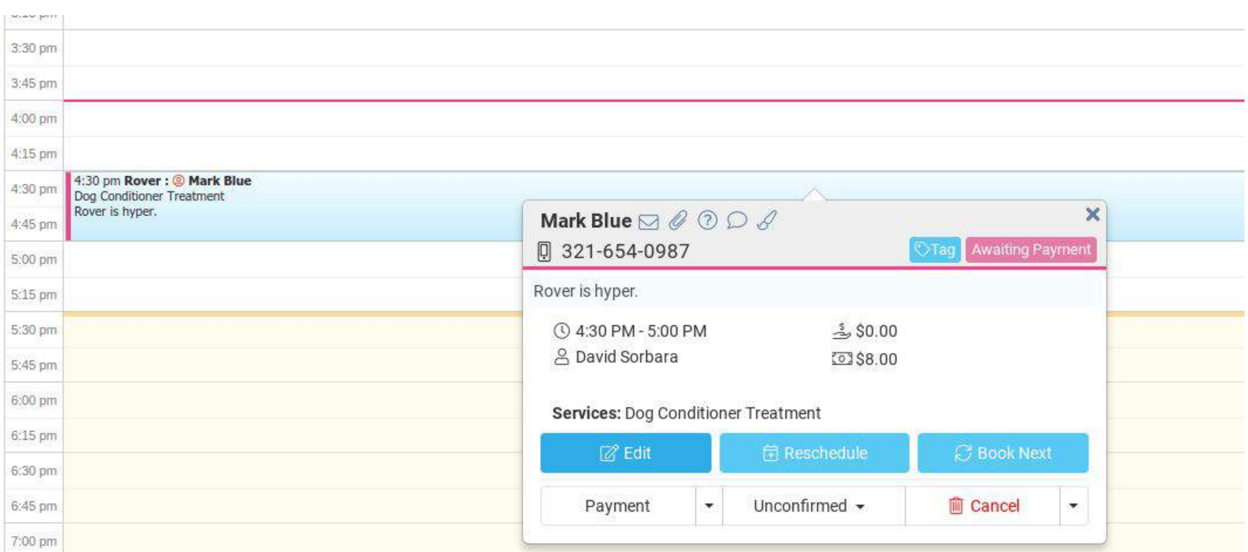
7h) You will now be brought back to your Calendar View.

Step 8: How To Complete A Booking

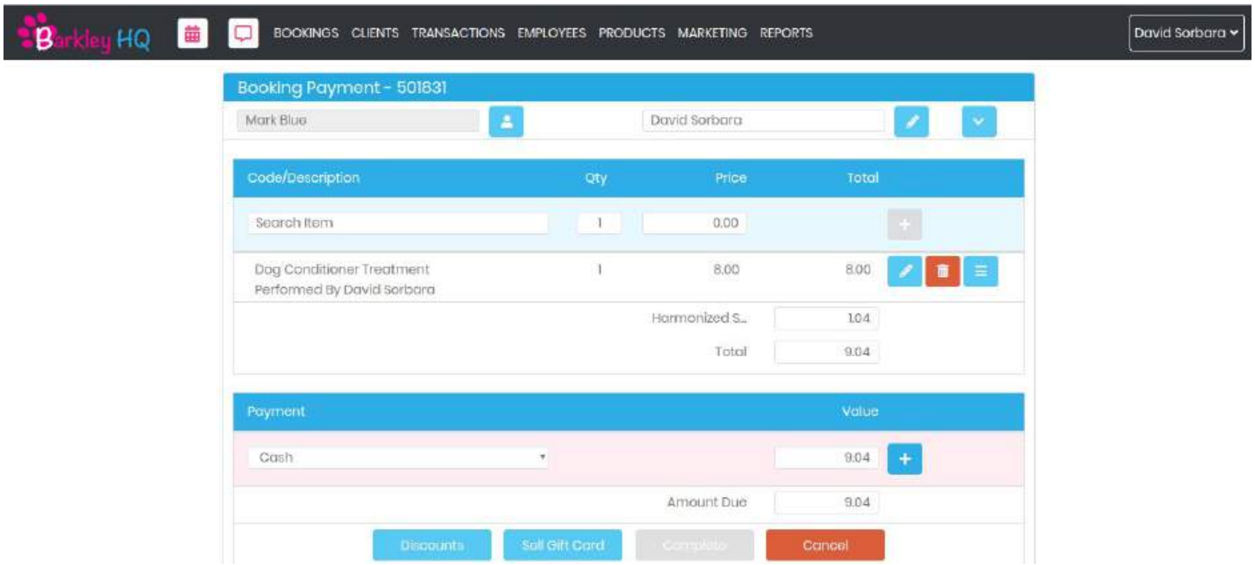
8a) To complete a booking click on the Calendar in the top toolbar to bring you to your Calendar View.



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



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



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.