



# The Path to Success With Your New Vagaro Calendar



**Kevin Hill**

1:00 - 1:40

Short Haircut a...

**Kevin Hill**

Short Haircut and Blow-dry

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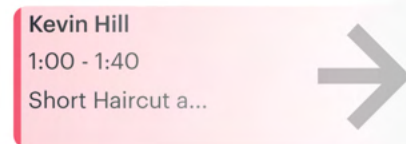
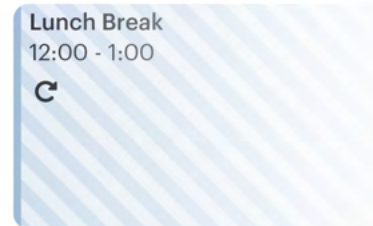
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# Get Familiar With What Things Look Like



# 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.

 **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.

 **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.

 **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.

 **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**

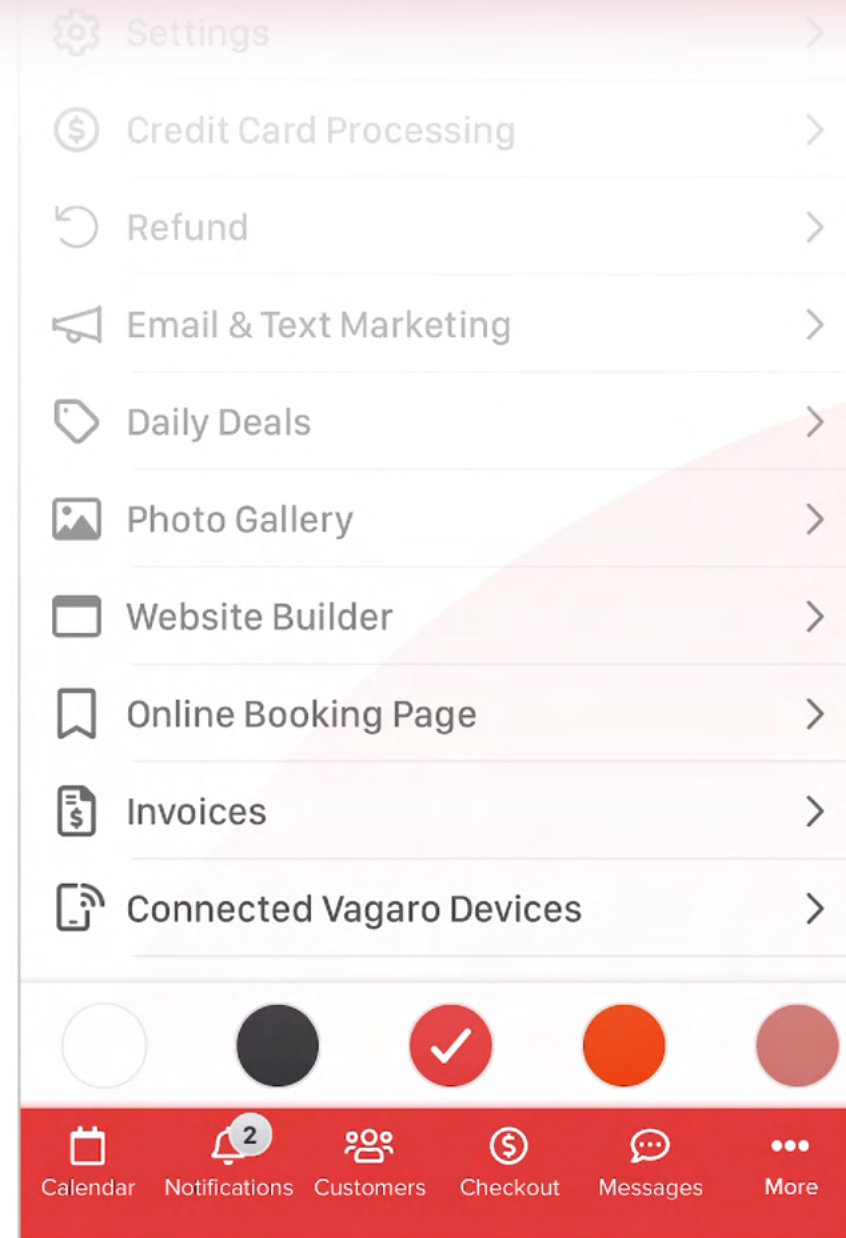
The business manually selects this status on the calendar screen to indicate that the customer did not show up for an appointment. You can also run the Cancellations & No-Shows report to see which customers missed their appointments and how often.

### **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.







# Get Set Up for Appointments to be Booked

**Kevin Hill**

Short Haircut and Blow-dry

**Monique Carter**

Long Haircut and Blow-dry

**Pamella Najm**

Glaze

# Update your new Booking Link

While your Booking Links will automatically redirect your clients to Vagaro at first, you will want to get them updated to ensure there's no interruption to booking down the road!

Here are some places you might need to update your booking link:

- Book Now Link in Instagram
- Google My Business
- Your Website
- Your Website Widget Integration
- Your Business Cards (If you had your direct booking link on them.)
- Your Voicemail Greeting

Share the News About Your New Booking Link

Here are 3 ways to share the news:

### 1. Social Media Templates

Just head to Vagaro's template library to download them and start posting!



### 2. Email Banners

These banners are available under the "Announcement" category in the Email Marketing Templates. You'll see them when you start creating your email.

### 3. Email Copy Templates

Vagaro also provides customizable email templates that make it easy to communicate the change. Just tweak the details and send them out to your client list.

## Pro Tip

### Add your Logo to Your New Vagaro Listing Page

Here's how...

- 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.
- 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.

# Check Out Your Calendar Settings

## Calendar Configuration

[Tutorial](#)

Choose what your calendar page displays and select optional Tracking Customer Retention and labels. You can also change the order of the Service Provider list on your calendar page.

Week View Starting Day:

Monday

Default View at Login:

Month

Service Provider Max Limit in Day View:

25

Calendar Resolution:

5

### Calendar Line Spacing

This is the amount of space between time slots on your calendar.

30

|       |  |
|-------|--|
| 10 AM |  |
| 15    |  |
| 30    |  |
| 45    |  |
| 11 AM |  |

Show Current Time

A red line will mark the current time throughout the day.

# 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

< Online Appointment Rules ☆

### Online Appointment Rules

Set rules around when appointments can be made, require approval for online booking, manage waitlist preferences and configure how your clients can cancel or reschedule appointments.

#### APPOINTMENT

15 min Appointment Lead Time  
Limit how soon your customer can make an appointment with you online, giving you time to react to the request properly.

60 min Class Lead Time  
Limit how soon your customer can book a class with you online, giving you time to react to the request properly.

10 - + Appointment Search Limit  
Cap on the number of appointments



# 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.

The screenshot shows the 'Online Appointment Rules' settings page in a mobile app. The page has a red header with a back arrow, the title 'Online Appointment Rules', and a star icon. Below the header, the title 'Online Appointment Rules' is repeated, followed by a descriptive paragraph: 'Set rules around when appointments can be made, require approval for online booking, manage waitlist preferences and configure how your clients can cancel or reschedule appointments.' The settings are organized under the heading 'APPOINTMENT'. There are three main settings: 1. 'Appointment Lead Time' with a value of 15 and a unit of 'min'. The description is 'Limit how soon your customer can make an appointment with you online, giving you time to react to the request properly.' 2. 'Class Lead Time' with a value of 60 and a unit of 'min'. The description is 'Limit how soon your customer can book a class with you online, giving you time to react to the request properly.' 3. 'Appointment Search Limit' with a value of 10 and minus/plus buttons. The description is 'Specify the number of available appointments your customers will see when they are booking an...'. At the bottom of the settings area is a green 'Save' button. The bottom of the screen features a red navigation bar with icons for Calendar, Notifications (with a '2' badge), Customers, Checkout, Messages, and More.

Online Appointment Rules

Online Appointment Rules

Set rules around when appointments can be made, require approval for online booking, manage waitlist preferences and configure how your clients can cancel or reschedule appointments.

APPOINTMENT

15 min Appointment Lead Time  
Limit how soon your customer can make an appointment with you online, giving you time to react to the request properly.

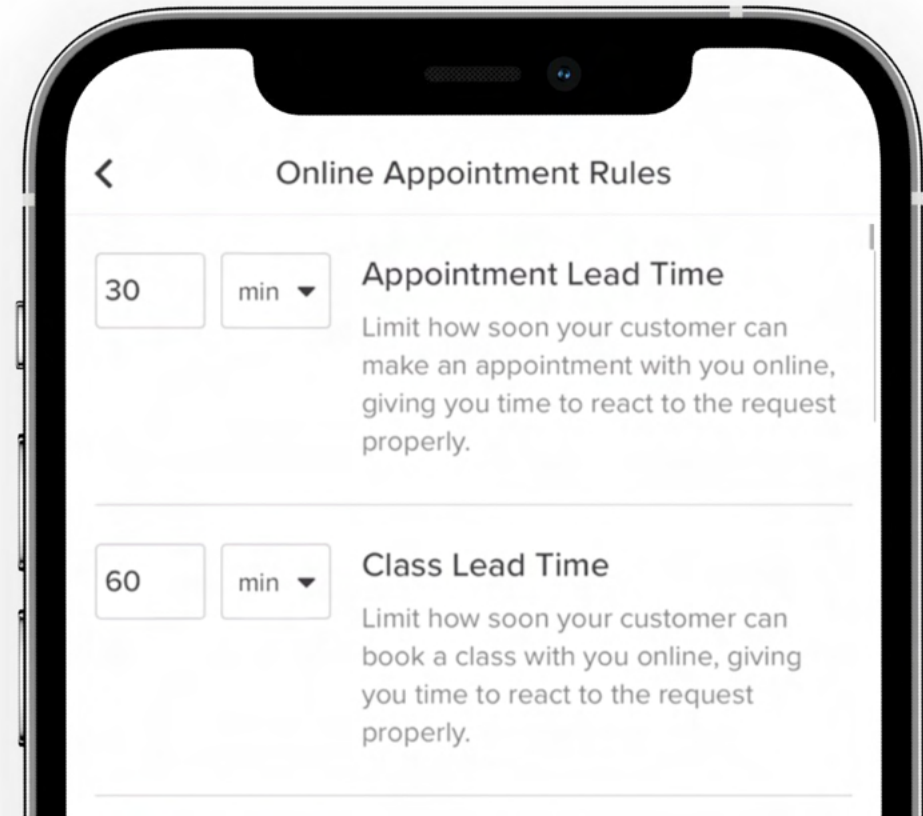
60 min Class Lead Time  
Limit how soon your customer can book a class with you online, giving you time to react to the request properly.

10 - + Appointment Search Limit  
Specify the number of available appointments your customers will see when they are booking an

Save

Calendar Notifications Customers Checkout Messages More

# 4 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.

To add or remove gap processing time:

Go to Settings → Things We Sell → Service/Class Menu.

Select the Service tab.

Select the service to be modified.

Scroll down to the list of service providers, select the employee's Duration box, and then select Add Gap Time.

# Practice Scheduling an Appointment

## Book Appointment with Jessica Pierce

Service with Missy Megginson

Long Haircut and Blow-dry

+ Add another service

Date:

Sep 25, 2025

Time:

2:00 PM

Price:

\$ 280.00

Duration:

45 min

House Call 🚗:

Not a House Call

Appointment Note:

Enter note here

Customer:

🔍 Name or Phone

Create New

Repeat:

Off

Daily

Weekly

Monthly

Yearly

Monique Carter

Long Haircut and Blow-dry

# 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



#### New Appointment

Create a new appointment.



#### New Multiple Appointments

Create multiple appointments.



#### New Multiple Appointments

Create a new class.



#### Add to Waitlist

Add a customer to the waitlist.



#### Personal Task

Add a personal task.




#### Edit Working Hours



Edit your calendar 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


**AK** **Abi Kudus**   
Highlight and Haircut  
Tue, Nov 5, 2024 - 10:00 AM


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 **Change Status**   
Client has confirmed appointment.


 **Edit**  
Edit this appointment.


 **Notes**  
View client notes.


 **Forms**  
View client forms.

 **Rebook**  
Rebook this appointment.

 **Print Ticket**   
Print a ticket for this appointment.

 **Delete**  
Delete this appointment.

 **Move**  
Move to a different time.

 **Upload File**  
Attach a file to this appointment.

**Checkout**

# Rescheduling Appointments

|                          |   |
|--------------------------|---|
| Alejandro Ortega         | > |
| Shampoo                  |   |
| Add-Ons                  | > |
| Flynn Keith              | > |
| Date Thu, Oct 17, 2024 > |   |
| <a href="#">Next</a>     |   |

## 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

|           |           |             |           |           |           |           |
|-----------|-----------|-------------|-----------|-----------|-----------|-----------|
| 13<br>SUN | 14<br>MON | 15<br>TODAY | 16<br>WED | 17<br>THU | 18<br>FRI | 19<br>SAT |
|-----------|-----------|-------------|-----------|-----------|-----------|-----------|

Thu, Oct 17, 2024



**Flynn Keith**  
★★★★★ (0)  
\$45  
Shampoo

**Morning**

09:00 AM 09:15 AM 09:30 AM 09:45 AM 11:15 AM  
11:30 AM 11:45 AM

**Afternoon**

12:00 PM 12:15 PM 12:30 PM 12:45 PM 01:00 PM  
01:15 PM 01:30 PM 01:45 PM 02:00 PM 02:45 PM

# 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.




|              |               |         |        |
|--------------|---------------|---------|--------|
| Daily        | <b>Weekly</b> | Monthly | Yearly |
| Repeat Every | 1 Week        |         |        |
| Sunday       |               |         |        |
| Monday       |               |         |        |
| Tuesday      | ✓             |         |        |
| Wednesday    |               |         |        |
| Thursday     |               |         |        |
| Friday       |               |         |        |
| Saturday     |               |         |        |
| End Date     | Required      |         |        |

# Have Recurring Appointments?


We moved them over for a total of 6 months, but you'll want to set those up again.

## Pro Tip


We recommend going to your Schedulicity account and running a Recurring Appts/Personal Time report to use for reference.

 **Alejandro Ortega**   
Shampoo   
Wed, Oct 09, 2024 - 5:15 AM

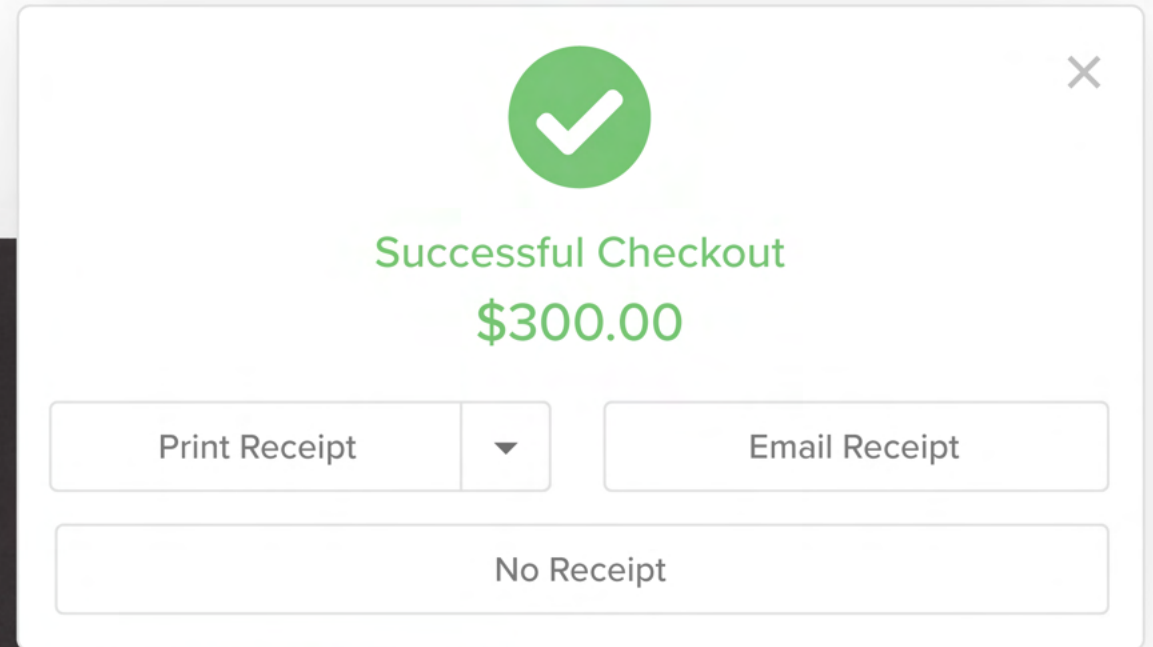
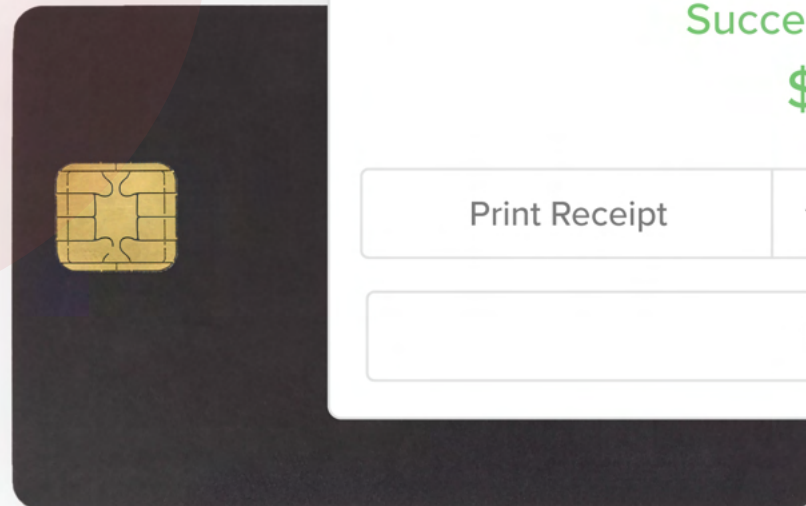
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 **Edit This Occurrence**  
Edit this appointment.

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 **Edit Series**  
Edit this appointment.

# 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.

### Checkout Settings ×

**Tipping Options:**

|     |     |     |     |
|-----|-----|-----|-----|
| 5%  | 10% | 15% | 20% |
| 25% | 30% | 35% | 40% |

Don't Ask for Tip

---



**Require Digital Signature**  
Require signature on screen after credit card transactions. (Touch Screen)

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**Contactless Checkout**  
Display the Contactless Popup during Checkout.

---

**Receipt Preference:**

|  |  |
|--|--|
| <br>Print | <br>Email |
|--|--|

Ask at Checkout

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**Receipt Printers**

Add Receipt Printer

Cancel Save

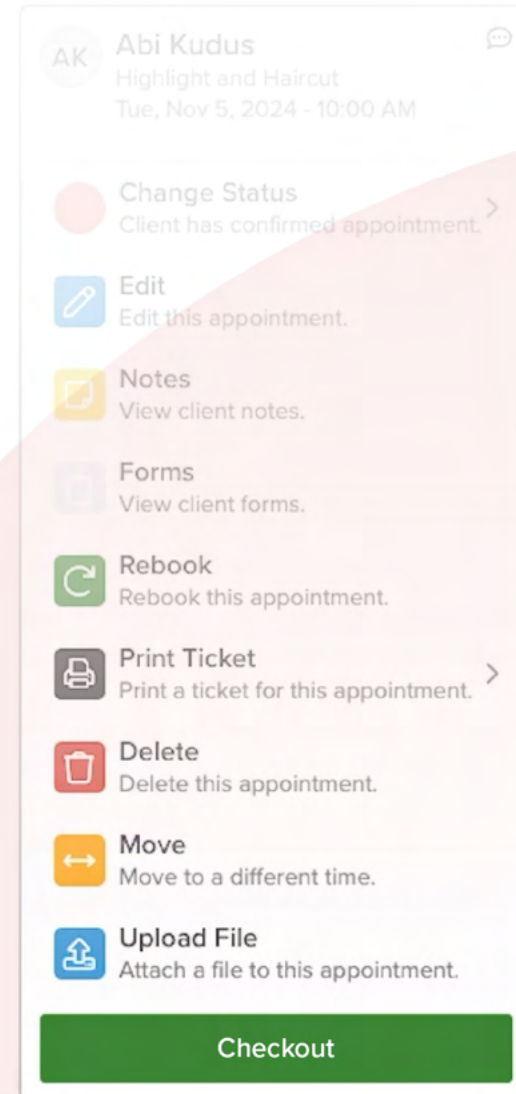
# Standard Checkout

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.

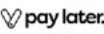


### For cash:

- 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.

|   |   |
|---|---|
| <b>Amount Due</b>   | <b>\$1000.20</b>                        |
| Cash  | \$500.00                                |
| Check   | \$200.00                                |
| Gift Certificates <input type="button" value="Add"/>  | \$200.00                                |
| IOU   | \$100.20                                |
| Credit Card <input type="button" value="Add"/>  | \$0.00                                  |
|  <input type="button" value="Invite"/> | \$0.00                                  |
| Other <input type="button" value="Add"/>  | \$0.00                                  |
| <b>Amount Paid</b>  | <b>\$1000.20</b>                        |
| Change Due  | \$0.00                                  |
| <input type="button" value="Connect"/>  | <input type="button" value="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.

Add IOU ? ×

Remaining Amount is **\$200.00**. Would you like to add an IOU?  
IOU = Customer Owes Business

IOU will automatically be added to client's next checkout or they can be paid anytime by going to the IOU page under "Reports".

*Note: Commission employees' payroll includes all services and products paid by IOU*

\* Comment

### 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.

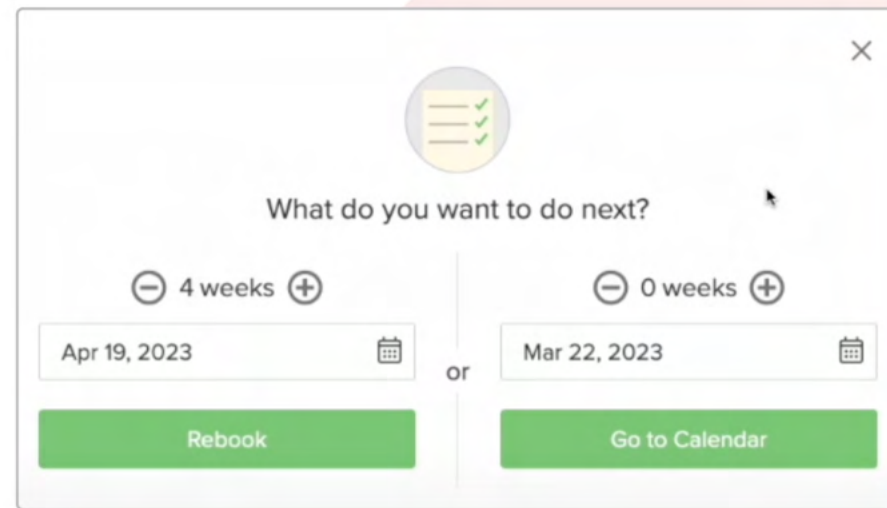
# Lets Rebook Your First Client!

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.”



A screenshot of a rebooking dialog box. At the top center is a yellow circular icon with a checklist. Below it, the text "What do you want to do next?" is displayed. The dialog is split into two columns. The left column has a range selector showing "4 weeks" with minus and plus icons, a date field containing "Apr 19, 2023" with a calendar icon, and a green "Rebook" button. The right column has a range selector showing "0 weeks" with minus and plus icons, a date field containing "Mar 22, 2023" with a calendar icon, and a green "Go to Calendar" button. The word "or" is centered between the two columns. A close button (X) is in the top right corner.

# Find More Info

[info.vagaro.com/schedulicity-welcome](https://info.vagaro.com/schedulicity-welcome)

The screenshot shows the Vagaro website's welcome page for Schedulicity users. At the top left is the Vagaro logo, followed by navigation links for Learn, Resources, FAQ, and Support. The main heading reads "Welcome Schedulicity Users to Your New Home at Vagaro". Below this is a paragraph: "Your transition to Vagaro starts here. Get ready to explore powerful features and resources designed to elevate your success. We're here to support your business every step of the way." To the right of the text is a smartphone displaying a calendar interface with appointments for Missy Megginson, including "Personal Task Lunch", "Kevin Hill Short Haircut and Blow-dry", and "Monique Carter Long Haircut and Blow-dry". Below the main content is a section titled "TRANSITION WITH EASE" and "Get to Know Your New Software". A sub-headline says "Explore where to find the tools you know and love—now powered by Vagaro's advanced features. These quick videos make it easy to continue running your business without skipping a beat." At the bottom are three video player thumbnails: "EPISODE 1: Your New Calendar, Notifications & More", "EPISODE 2: Customizing Your Booking & Calendar Experience", and "EPISODE 3: Rebook, Move, & Manage Your Appointments".

**vagaro**    Learn   Resources   FAQ   Support

## Welcome Schedulicity Users to Your New Home at Vagaro

Your transition to Vagaro starts here. Get ready to explore powerful features and resources designed to elevate your success. We're here to support your business every step of the way.

**TRANSITION WITH EASE**

### Get to Know Your New Software

Explore where to find the tools you know and love—now powered by Vagaro's advanced features. These quick videos make it easy to continue running your business without skipping a beat.

- EPISODE 1**  
Your New Calendar, Notifications & More
- EPISODE 2**  
Customizing Your Booking & Calendar Experience
- EPISODE 3**  
Rebook, Move, & Manage Your Appointments