



Getting Started Guide

How to Use This Guide

Welcome to BridalLive!

This Getting Started Guide will walk you through the ten basic steps you need to start using BridalLive in your store today. The steps in this guide take about 20 minutes to complete. Feel free to print this document and work through it at your own pace.

Once you've completed the ten steps in the Getting Started Guide, you'll be able to:

- Print out your company information on all receipts, orders, etc.
- Use the Smart Book feature to easily book appointments on your BridalLive calendar
- Begin setting up your Online Appointment Scheduler (or Appointment Request Form) on your website
- Use the Point of Sale module to take payments and print receipts with your logo and sales agreements.
- QuickBooks users will be able to export their sales information to QuickBooks for hassle free bookkeeping.

At any time during the process you can skip steps or leave an area and revisit at another time.

To make set up easier and quicker, it will be helpful if you have the following items available:

- A list of all of your employees and their schedule
- Your store's schedule, including holidays and other occasions when your store will be closed or the hours will change
- A list of the types of appointments your store handles and the length of time you set aside for each appointment
- A fitting room schedule, including what types of appointments are handled in which fitting rooms
- A digital copy of your logo available on your computer

We've provided a "Questions for BridalLive" section at the bottom of each page for you to note if you have questions about the particular area. During your training call, we'll be happy to answer any questions you have!

You are on your way to having a first-class bridal software solution at your fingertips, so let's get started.



Every part of the set up process covered in this guide will take place in the Settings section of your BridalLive. Simply click on the Settings icon at the bottom of the left sidebar to access the menu.

Step #1: Set Up Your Company Profile

Locate your Company Profile by clicking Settings > Company Profile

Let's take care of the easy stuff first...

On the Company Profile page, tell BridalLive a little about your store by entering your store's contact information and business hours.



Pro Tip

Your company's contact information is used when printing & emailing customer receipts and purchase orders. Enter the information as you would like it to appear to your customers and vendors.

Company Profile Save

| | | | |
|-----------------|---|-----------|---|
| Company Name * | <input type="text" value="Your Bridal Shop"/> | Address 1 | <input type="text" value="1212 Main Street"/> |
| Email Address * | <input type="text" value="info@yourbridalshop.com"/> | Address 2 | <input type="text" value="Suite A"/> |
| Website | <input type="text" value="www.YourBridalShop.com"/> | City | <input type="text" value="Atlanta"/> |
| Phone Number | <input type="text" value="888-444-4696 ____"/> | State | <input type="text" value="Georgia"/> |
| Fax Number | <input type="text" value="____-____-____"/> | Zip Code | <input type="text" value="30350"/> |
| Time Zone * | <input type="text" value="(GMT-05:00) Eastern Time (US & C.)"/> | Locale | <input type="text" value="United States"/> |

Business Hours

| Day of Week | Opening Time | Closing Time | Closed |
|-------------|--------------------------------------|-------------------------------------|--------------------------|
| Sunday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Monday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Tuesday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Wednesday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Thursday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Friday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |
| Saturday | <input type="text" value="10:00AM"/> | <input type="text" value="5:00PM"/> | <input type="checkbox"/> |

I am done with this step

I have questions for BridalLive (use space below)

Step #2: Set Up Your BridalLive Payment Profile

Update Your Payment Information by clicking Settings > Account Settings

On the Account Settings page, set up a payment profile for your BridalLive subscription by clicking the "Add Credit Card" button and entering your credit card information.

Your card won't be charged until the end of your free trial and you can cancel at any time without incurring any fees. After the first billing, BridalLive will attempt to charge your card every month thereafter.



Pro Tip

Want to upgrade your BridalLive plan or view your account statements? Visit the Account Setting page

Account Settings

Your Current Plan: STANDARD [Change Plan](#)

Account Status: Active

Account Balance: \$0.00

Next Billing: \$0.00 on 07/15/2015

Card: None [Add Credit Card](#) ← Click here to add your payment information

I am done with this step

I have questions for BridalLive (use space below)

Step #3: Enter Your Users

Set Up Your Users by clicking Settings > Users & Security > Users

Now let's get personal...

It's time to enter you users, in other words, the employees and other people that will need to access your store's BridalLive account.

Tell us about your staff

- Click the **Add User** button to enter contact information for each employee or other person who will need access to your BridalLive account.
- Assign each user a unique user name and password
- Choose the appropriate role for each user
The role will become important later when you are setting up which users can view the different areas of your BridalLive.
- Designate a color for each user
Colors will be used to differentiate users on BridalLive calendars



It's quite common to create a User for your accountant and seamstresses also. BridalLive has pre-defined User Roles for accountants and seamstresses. Each Role restricts the User's access to a small portion of BridalLive.

Users

📘 Users are the people that have access to your BridalLive account. Users can be Employees, Seamstresses, Accountants, etc. Each user can be setup with a list of appointment types they can handle, a work schedule and monthly sales goals. Additionally, each can be assigned a Role which controls the features they can access.

Your plan includes up to 10 users

| Name | Role | Color | Status | Actions |
|------------------|------------------|---------------------------------------|--------|--|
| Another User | Sales Consultant | ■ | Active | <input type="button" value="Edit"/> <input type="button" value="Manage: Work Schedule"/> <input type="button" value="Delete"/> |
| Lindsey Phillips | Sales Consultant | ■ | Active | <input type="button" value="Edit"/> <input type="button" value="Manage: Work Schedule"/> <input type="button" value="Delete"/> |
| New User | Sales Consultant | ■ | Active | <input type="button" value="Edit"/> <input type="button" value="Manage: Work Schedule"/> <input type="button" value="Delete"/> |
| Rachel Esposito | Administrator | ■ | Active | <input type="button" value="Edit"/> <input type="button" value="Manage: Work Schedule"/> <input type="button" value="Delete"/> |

I am done with this step

I have questions for BridalLive (use space below)

Step #3: Enter Your Users (cont.)

Set Up Your Users by clicking Settings > Users & Security > Users

Now let's get into the nitty gritty of user set up.

Our exclusive Smart Book technology takes all the guess work and hassle out of booking appointments. For Smart Book to do its job, we need to gather more information about your users.

First, we need to know when your employees are available to take appointments.

To begin entering Work Schedule, click on **Manage Work Schedule** located on the right side of each user under the **Actions** column



Pro Tip

If you have an employee who works the same schedule each week, save time in this step by checking the recurring box. Any temporary changes in schedule can be entered later and will automatically override the recurring schedule.

Work Schedule for Lindsey Phillips

Work Schedule | Time Off

Enter the days that Lindsey Phillips will be scheduled to work. You can expand the date range below to see just the days you are interested in viewing.

Works every from to

Recurring

View work schedule for to

| Date | Start Time | End Time | Actions |
|------------------|------------|----------|---------------------------------------|
| 07/05/2015 (Sun) | 10:00AM | 5:00PM | <input type="button" value="Delete"/> |
| 07/07/2015 (Tue) | 10:00AM | 5:00PM | <input type="button" value="Delete"/> |
| 07/08/2015 (Wed) | 10:00AM | 5:00PM | <input type="button" value="Delete"/> |
| 07/09/2015 (Thu) | 10:00AM | 12:00PM | <input type="button" value="Delete"/> |
| 07/11/2015 (Sat) | 10:00AM | 4:00PM | <input type="button" value="Delete"/> |

I am done with this step

I have questions for BridalLive (use space below)

Step #3: Enter Your Users (cont.)

Set Up Your Users by clicking Settings > Users & Security > Users

Time Off

Even the most dedicated employees need a break.

Click on the **Time Off** tab at the top of the Manage Work Schedule screen to tell BridalLive when each employee will be unavailable for scheduling, e.g. lunch breaks, vacation, etc.

Work Schedule for Lindsey Phillips

Work Schedule | Time Off

Enter the days that Lindsey Phillips will not be working.

Has off on 07/25/2015 from 10:00am to 8:00pm

Add Time Off

View time off after 07/05/2015

| Date | Start Time | End Time | Actions |
|------------------|------------|----------|---------|
| 07/18/2015 (Sat) | 10:00 AM | 8:00 PM | Delete |
| 07/25/2015 (Sat) | 10:00 AM | 8:00 PM | Delete |

Time Punches

One of your sales consultants forgot to clock out? No problem! You can easily update an employee's hours in the Time Punches section of BridalLive.

To Edit a User's Time Punches, click on **Time Punches** From the drop down button on the Users screen.

Time Punches for Lindsey Phillips

Time Punches for 07/06/2015 - 07/06/2015

| Date | Start Time | End Time | Actions |
|------------|------------|----------|-------------|
| 07/06/2015 | 10:00 AM | 7:00 PM | Edit Delete |

I am done with this step

I have questions for BridalLive (use space below)

Step #4: Setup Appointment Types

Access your Appointment Types by clicking Settings > Activities > Appointment Types

Tell us more about your store...

For BridalLive's Smart Book technology to work its magic, we need to know what types of appointments your store offers and the duration of each appointment type.

On the Appointment Types page, you'll find a list of typical appointment types for bridal shops.

➡ If your store offers additional types, click the **Add Appointment Types** button at the top of the page.

➡ Click on the **edit** button for each type to change the appointment duration to your store's preferences.

Note: Be sure to specify which appointments you want your customers to be able to book online.

Appointment Types

📌 Appointment Types let you organize your calendar. Each appointment type has a pre-defined duration and color, which can always be changed at the time of booking. If you would like website visitors to request or schedule appointments online, be sure to change appointment type's 'Book Online' setting to Yes.

Add Appointment Type

| Description | Duration | Color | Book Online? | Status | Actions |
|-------------------------|-----------|-------|--------------|--------|---|
| Alterations Appointment | 30min | | Yes | Active | Edit Delete |
| Bridal Appointment | 1hr 30min | | Yes | Active | Edit Delete |
| Bridesmaid Appointment | 1hr | | Yes | Active | Edit Delete |
| Changing Appointment | 1hr | | Yes | Active | Edit Delete |
| Events | 1hr | | No | Active | Edit Delete |
| Other Appointment | 1hr | | Yes | Active | Edit Delete |



Pro Tip

Many store owners choose to allow online bookings for "first time" Bridal and Bridesmaid appointments but turn off the online booking for second visits such as alterations, follow up bridal appointments, etc.

I am done with this step

I have questions for BridalLive (use space below)

Step #5: Calendar Black Out Dates


Set Up Your Black Out Dates by clicking Settings > Activities > Black Out Dates

Tell us when appointments are not allowed

We know your appointment availability will change from time to time due to holidays, inventory days, closed for market, lunch, etc.

Enter in the times your store will be closed or your staff will be otherwise occupied in the Calendar Black Out Dates page, and the Smart Book algorithm will never suggest appointments during those times.

Calendar Black Out Dates

 The Calendar Black Out Dates feature allows you to enter dates that you do not want appointments booked.

View black out dates for to

Don't allow appointments on from to

Why are you blacking out the date? (optional)

| Date | Start Time | End Time | Comment | Actions |
|------------------|------------|----------|--------------|---------------------------------------|
| 04/28/2015 (Tue) | 12:00 PM | 2:00 PM | Work Meeting | <input type="button" value="Delete"/> |

I am done with this step

I have questions for BridalLive (use space below)

Step #6: Fitting Rooms

Set Up Your Fitting Rooms by clicking Settings > Fitting Rooms

Give us a peek into your fitting rooms.

We need one final piece of information from you before our Smart Book technology can begin simplifying your booking process. Please take a few minutes to share the details of your store's fitting rooms.

On the Fitting Rooms page, you can add or delete rooms according to your store's capacity.

➡ Click the **edit** button to add your fitting room's name in the description. Simply name it whatever you call the room in your store, e.g. "bridal fitting room" or "back fitting room," etc.

Remember to select "yes" for the **Book Online** setting for fitting rooms that you want your customers to be able to book through your website.

Fitting Rooms

📌 Fitting Rooms tell BridalLive the space you have available for appointments. If you would like website visitors to request or schedule appointments for a fitting room online, be sure to change *Book Online* setting for that fitting room to Yes. The booking method controls whether appointments should be booked on a fixed interval (Blocks) or at any time (First Available). [Learn more...](#)

Add Fitting Room

| Description | Book Online? | Booking Method | Status | Actions |
|------------------------------|--------------|----------------|--------|--|
| #1 Bridal Fitting Room | Yes | Blocks | Active | <input type="button" value="Edit"/> <input type="button" value="Setup"/> <input type="button" value="Delete"/> |
| #2 Bridesmaid Fitting Room | Yes | Blocks | Active | <input type="button" value="Edit"/> <input type="button" value="Setup"/> <input type="button" value="Delete"/> |
| #3 Tuxedo/Other Fitting Room | Yes | Blocks | Active | <input type="button" value="Edit"/> <input type="button" value="Setup"/> <input type="button" value="Delete"/> |
| #4 Alterations Fitting Room | Yes | Blocks | Active | <input type="button" value="Edit"/> <input type="button" value="Setup"/> <input type="button" value="Delete"/> |
| #5 Misc Room | Yes | Blocks | Active | <input type="button" value="Edit"/> <input type="button" value="Setup"/> <input type="button" value="Delete"/> |

I am done with this step

I have questions for BridalLive (use space below)

Step #6: Fitting Rooms (cont.) - Booking Methods

Set Up Your Fitting Rooms by clicking Settings > Fitting Rooms

Setup for #1 Bridal Fitting Room ✕

ⓘ Blocks can be setup with 1 or more appointment type. For instance, you may book only Bridal Appointments in Fitting Room #1, but Fitting Room #2 may handle both Bridesmaid and Tuxedo appointments. If you do decide to assign multiple appointment types to a block, we recommend that you only do so for appointment types that have the same duration. Otherwise, you may be under utilizing your fitting room.

Blocks displayed for:

| Appointment Type | Start Time | End Time | Actions |
|--------------------|------------|----------|---------|
| Bridal Appointment | 11:30AM | 1:00PM | Delete |
| Bridal Appointment | 1:00PM | 2:30PM | Delete |
| Bridal Appointment | 2:30PM | 4:00PM | Delete |

One size doesn't fit all when it comes to Bridal fitting rooms.

We've given you two options for booking your rooms: First Available or Blocks.

When entering in your fitting rooms, select the booking method you prefer for each room. Then click on the **Setup** button to customize each room.

For more information on how to setup fitting rooms, refer to our Help Center article [How to Setup Fitting Rooms](#)



Pro Tip

We recommend Blocks for any fitting rooms that can be booked online. First Available booking method is suggested for situations where you may take walk-ins more often than appointments, e.g. prom or tuxedo fitting rooms

I am done with this step

I have questions for BridalLive (use space below)

Step #7: Point of Sale – Your Store’s Logo

Set Up Your POS Preferences by clicking Settings > Point of Sale > Preferences

BridalLive’s Point of Sale module will be invaluable to your store’s day to day operations.


To get started, let’s add your logo. This will give your receipt print outs a customized look.

➡ At the bottom of the preferences page, click on the **Browse for Logo** button to upload your store’s logo from your computer.

If your logo is larger than 250 x 125 pixels, click on the **Resize Logo** link and you’ll be directed to a website that will resize it for you.

Your Store's Logo

Upload a logo (Files must be 250 X 125 or smaller. [Resize here](#))



I am done with this step

I have questions for BridalLive (use space below)

Step #8: Sales Agreements

Set Up Your Sales Agreements by clicking Settings > Point of Sale > Sales Agreements

On the Sales Agreements page, we've done some of the hard work for you and have included some standard verbiage for your sales agreements.

Use these as a starting point and guide. Read them carefully and then tweak them to reflect your store's terms and conditions.

Each type of transaction can have its own sales agreement. Many stores have different agreements for Sales (i.e. off the rack) and Special Orders.

Note: If you do not want the sales agreement included on your receipts, simply delete the text and nothing will print.

Sales Agreements Save

📌 Sales Agreements print on the receipts printed from the Point Of Sale. Each type of transaction can have its own sales agreement since your terms may vary for something purchased off the floor (Sale), special ordered, put on layaway, or returned. If you would like to use the sales agreement as a credit card receipt, be sure to include a signature and date line.

Sale

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🔗 <>

Customer acknowledges receipt of goods and/or services in the amount of the total shown hereon. All sales are final. No refunds or exchanges.

- I agree with the designer, style, color and size for each item ordered. I understand that custom measurements and/or custom length may not be exact. I understand that dye lots may vary from swatches. I further understand that payments are forfeited in case the event is cancelled, without exception.
- I understand that when purchasing a floor sample item, it is sold in 'as is' condition. The cost of any fixing and cleaning will be my responsibility.
- I understand that alterations to the merchandise may be necessary and that alterations will incur a separate charge. I further understand that I will not hold this store liable for any alteration inaccuracies or errors.
- I understand that all sales are final and are neither returnable nor exchangeable. No Exceptions. I have read and understand all Store Policies and agree to the terms and conditions therein.

X _____ (Signature) _____ (Date)

Special Order

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🔗 <>

I am done with this step

I have questions for BridalLive (use space below)

Step #9: Sales Tax Codes

Set Up Your Tax Codes by clicking Settings > Point of Sale > Tax Codes

No need to break out the calculator for each sale to figure out sales tax.

Simply enter in the tax percent that you are required to collect and BridalLive will do the heavy lifting.

Note: Once you have entered your sales tax rate, you can apply that rate to the inventory items that sales tax should be calculated on.

Tax Codes

i Tax codes can be setup to automatically calculate the sales tax due on transactions. If you are in an area without fixed rate sales tax, you may need to Enable Manual Sales Tax Calculation under Settings > Point of Sale > Preferences.

Add Tax Code

| Description | Percent | Status | Actions |
|-------------|---------|--------|---|
| No Tax | 0 | Active | Edit Delete |
| Sales Tax | 6 | Active | Edit Delete |

Enter in your tax as a whole percent.
For example, if your sales tax rate is 6%,
enter 6 not .06.

I am done with this step

I have questions for BridalLive (use space below)

Step #10: Credit Card Processing

Set Up Your Merchant Account by clicking Settings > Point of Sale > Credit Card Processing (Merchant Account)

Now it's time to get paid!

Setting up BridalLive to process credit cards requires a little work in the initial set up, but it will simplify your check out process from here on out.

Before beginning the set up on BridalLive, you'll need to establish a Merchant Account with one of our preferred partners: ChargeItPro or Open Edge.

We recommend [ChargeItPro](#) for their top notch customer service and excellent rates. [ChargeItPro](#) can often meet or beat your current rates and may be able to help if you are stuck in a contract.

Contact Charge it Pro at 800.989.2135 or [Click here to check out their rates](#)

Once you've set up an account with ChargeItPro, they'll provide you with the information to plug into the Credit Card Processing page in BridalLive.

Three advantages of processing credit cards through BridalLive:

1. You can take payments in one easy step by swiping the customer's credit card directly into BridalLive.
2. You'll save time and paper by including your credit card terms along with your sales agreement, requiring just one receipt and one signature from your customer
3. You can process credit cards on the go (bridal shows, etc) or on the sales floor by using the BridalLive iPad App

I am done with this step

I have questions for BridalLive (use space below)

Bonus Step: QuickBooks Setup

Set Up Your QuickBooks Settings by clicking Settings > Point of Sale > QuickBooks Export Settings

This step is only necessary if you intend on using QuickBooks to manage your financials.

The most important part of the QuickBooks integration is to have your accountant or bookkeeper set up your account mappings.

For a complete walk-through on QuickBooks Setup, refer to our [QuickBooks Export](#) Help Center Article which has a video and a complete tutorial on how information is exported from BridalLive to QuickBooks!

After reading the help article and watching the video, your accountant/bookkeeper can contact us with any questions.

QuickBooks Export Settings Save Download QuickBooks Web Connector File

i BridalLive can export your Sales, Sales Tax Payable, Cost of Goods Sold, and more to QuickBooks. Since many businesses have their books set up differently, you will want to consult with your accountant before setting this up. Our Help Center has a [thorough article and video](#) that explains how the export works and how to set it up. [Click Here](#) to view the article.

Export Start Date

Export End Date

Export Type

QuickBooks Web Connector Password

Select the items to Export

Receiving Vouchers Yes No

Sales & Sales Tax Yes No

Cost of Goods Sold Yes No

I am done with this step

I have questions for BridalLive (use space below)

What's Next?

Congratulations! You made it through the Setup Guide!

We want to help you be successful with your new bridal software. Click the link below to schedule your training call!

[SCHEDULE TRAINING CALL](#)