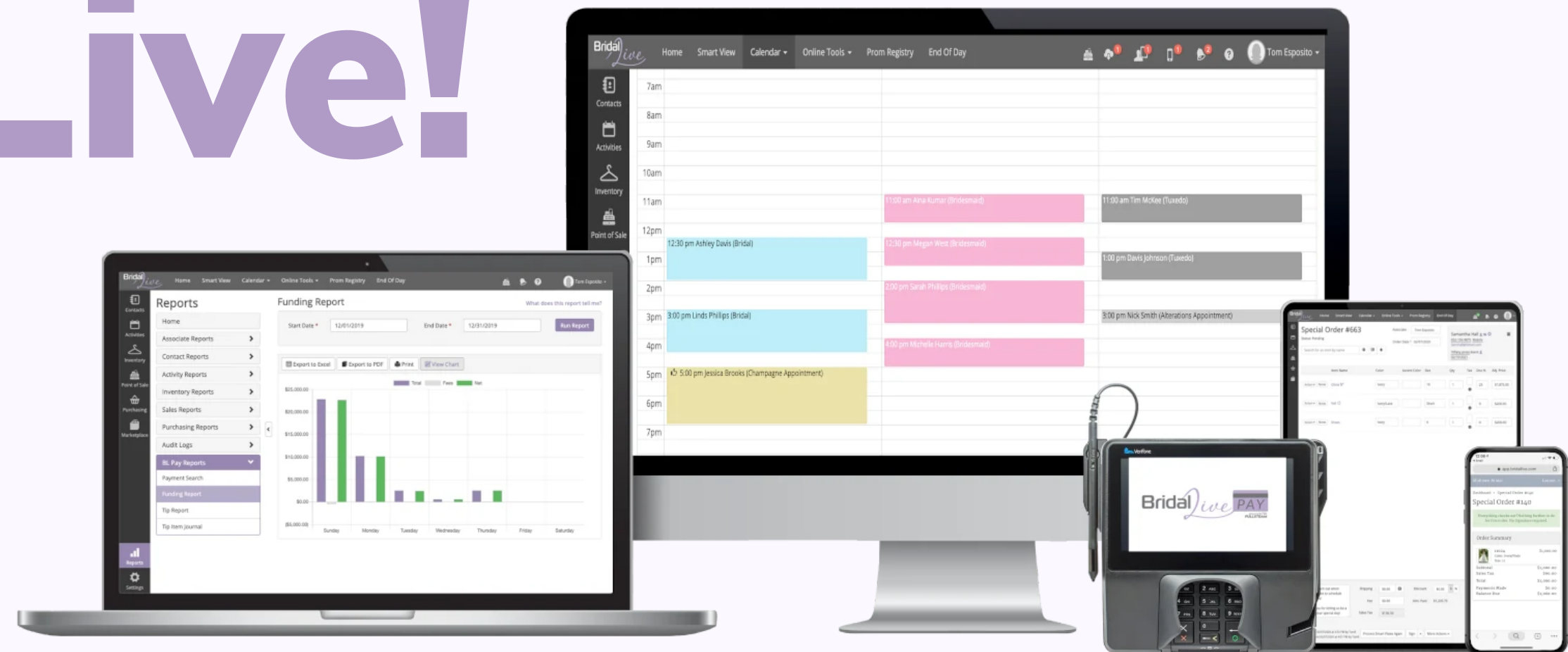# Welcome to BridalLive!

How to Use This Guide

This Getting Started Guide will walk you through the basic steps you need to start using BridalLive in your store today. The steps in this guide take about 20 minutes to complete.

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.

_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

You will be assigned an account manager that will assist in your set up with an onboarding call! During your onboarding call, we'll be happy to answer any questions you have! When the onboarding call is complete, most stores are ready to have their website forms installed to begin booking online.

At the end of this guide, you will find a resources page that will link to in depth articles, videos, and webinars to dive deeper into the topics we are covering here!

You are on your way to having a first-class bridal software solution at your fingertips, so let's get started.
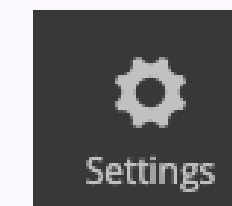
Every part of the set up process covered in this guide will take place in the **Settings section** of your BridalLive.

Simply click on the Settings icon at the bottom of the left sidebar to access the menu.

Setup Your Company Profile

Locate your Company Profile by clicking Settings > Company > Company Profile
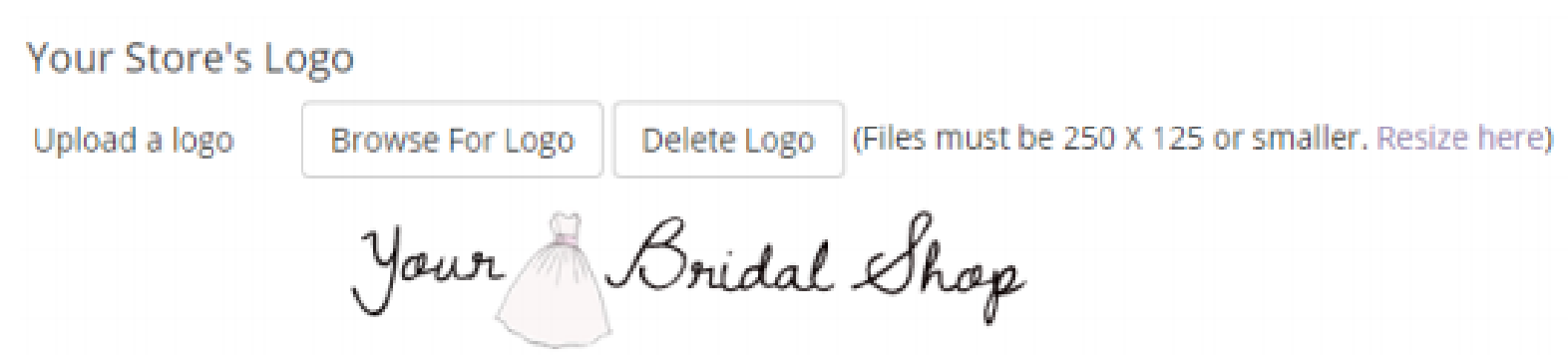

On the Company Profile page, tell BridalLive a little about your store by entering your store's contact information and business hours. For more information, check out our help center article here.

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.

Store Logo

Set Up Your Logo by clicking Settings > Company > Preferences

Your Store's Logo

Upload a logo   Browse For Logo   Delete Logo   (Files must be 250 X 125 or smaller. Resize here)

Your Bridal Shop

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.

The logo uploaded here will display on top of your printed invoice. This will not apply to your email headers. Please see the resources page for more details on adding your logo to your emails!

Setup Your Payment Profile

Update Your Payment Information by clicking Settings > Account Settings
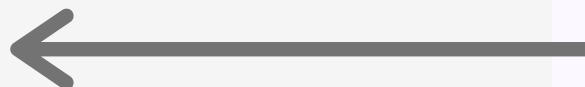
Next Billing Get Free Months!

Account Balance: $0.00
Next Billing: $199.00 on 08/07/2020
: (/) None

View Billing Portal   Add Credit Card

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.

The billing portal provides shops with the ability to view and download all billing history & statements!

Enter Your Users

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

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

Users

ℹ️ 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.

Add User				Your plan includes up to 10 users
Name	Role	Color	Status	Actions
Lindsey Phillips	Sales Consultant	🟧	Active	Edit Manage: Work Schedule ▾ Delete
Rachel Esposito	Administrator	🟦	Active	Edit ▾ Delete

Appointment Types
Time Punches
Monthly Sales Goals

- **Click the 'Add User' button to enter contact information for each employee or other person who will need access to your BridalLive account.**

  They will each be assigned a unique username 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

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.

For more information on adding users click here, for more information on work schedules click here.

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 [Sunday ▾] from [Start Time] to [End Time]

☑ Recurring

[Add Schedule Entry]

View work schedule for [03/01/2015] to [03/07/2015]

Date	Start Time	End Time	Actions
03/03/2015 (Tue) ⇄	10:00AM	6:00PM	Delete
03/04/2015 (Wed) ⇄	10:00AM	6:00PM	Delete
03/05/2015 (Thu) ⇄	10:00AM	6:00PM	Delete
03/06/2015 (Fri) ⇄	10:00AM	6:00PM	Delete
03/07/2015 (Sat) ⇄	10:00AM	6:00PM	Delete

Time Off

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 Aina Kumar   ✕

Work Schedule | **Time Off**

Enter the days that Aina Kumar will not be working.
● Single Day ○ Multiple Days

Has off on 11/17/2020 from 1:00pm to 4:00pm

Add Time Off

View time off after 08/02/2020

Date	Start Time	End Time	Actions
08/05/2020 (Wed)	1:00pm	4:00pm	Edit Delete
11/17/2020 (Tue)	1:00pm	4:00pm	Edit Delete

Close

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 Aina Kumar   ✕

Time Punches for 08/05/2020 - 08/05/2020

08/05/2020	Start Time	End Time	Add
Date	**Start Time**	**End Time**	**Actions**
08/05/2020 ⓘ	2:15 PM	5:45 PM	Edit

Close

Setup Appointment Types

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

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?	Charge for Bookings/Cancellations?	Status	Actions
Alterations Appointment	1h		Yes	No	Active	Edit Delete
Bridal Appointment	1h 30min		Yes	No	Active	Edit Delete
Bridesmaid Appointment	1h		Yes	No	Active	Edit Delete
Other Appointment	1h		Yes	No	Active	Edit Delete
Tuxedo Appointment	1h		Yes	No	Active	Edit Delete

For BridalLive's Smart Book technology to work it's 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.

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

Calendar Blackout Dates

Shops opening soon can use black out dates to block out the days leading up to your grand opening.
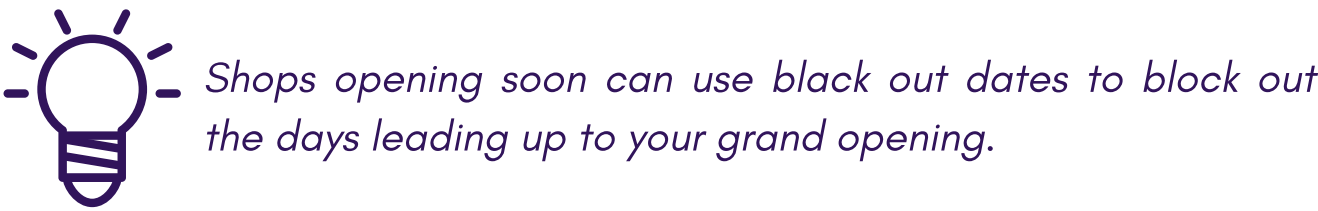
Set Up Your Black Out Dates by clicking Settings > Activities > Black Out Dates

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 [01/01/2020] to [12/31/2020]

Don't allow appointments on [08/05/2020] from [Start Time] to [End Time]

[Why are you blacking out the date? (optional)]

[Black out this time]

Date	Start Time	End Time	Comment	Actions
01/03/2020 (Fri)	12:45 AM	11:30 PM		Delete
01/26/2020 (Sun)	5:00 AM	9:45 PM		Delete

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.

Fitting Rooms

Set Up Your Fitting Rooms by clicking Settings > Fitting Rooms

Add Fitting Room				
Description	Book Online?	Booking Method	Status	Actions
Alterations	Yes	Blocks	Active	Edit Setup Duplicate Delete
Bridal Room	Yes	Blocks	Active	Edit Setup Duplicate Delete
Bridesmaid Room	No	First Available	Active	Edit Setup Duplicate Delete
Prom/Formalwear	No	First Available	Active	Edit Setup Duplicate Delete
Tuxedo	No	Blocks	Active	Edit Setup Duplicate Delete

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.

Booking Methods

Fitting Rooms continued..

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. For more information on booking methods, <u>click here.</u>

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.

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

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Setup for Fitting Room #1   ✕

Day of Week *   ☐ Sun   ☑ Mon   ☐ Tues   ☐ Wed   ☐ Thu   ☐ Fri   ☐ Sat

Appt. Type *   Bridal Appointment ⌄

Start & End Time *   3:00pm   4:30pm

Add Block

Monday

ℹ 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.

- Appointment Blocks should not overlap each other
- Appointment Blocks with the same Start Time should be included in the Choose Multiple option
- Appointments grouped with Choose Multiple should have similar appointment durations, or you could be underutilizing your calendar

Blocks displayed for: Monday ⌄   **Delete Monday's Blocks**

Appointment Type	Start Time	End Time	Actions
Bridal Appointment	9:00am	10:30am	Delete
Bridal Appointment	10:30am	12:00pm	Delete
Bridal Appointment	12:00pm	1:30pm	Delete
Bridal Appointment	1:30pm	3:00pm	Delete

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. Click here to learn more about editing sales agreements.

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

Add agreements for customer's to sign on your terminal, select Add> Custom Terminal Agreement. You can learn more about adding terminal agreements here.

Sales Agreements

ⓘ Sales Agreements print on the receipt printed from the Point Of Sale screen. Each type of transaction has it's own default Sales Agreement that will contain the standard terms and conditions of the transaction. Your default agreement for the transaction can be emailed to the customer. Additionally, you can create Custom Sales Agreements for things like Tuxedos or Alterations and with BridalLive Pay, you can add Custom Sales Agreements to obtain a signature on your 925 terminal.

Select a Custom Sales Agreement | Default Agreement - Sale | Save | Add ▾

More Actions ▾

Custom Sales Agreement
Custom Terminal Agreement

Name * | Default Agreement - Sale

Formats ▾ | Font Sizes ▾ | **B** | *I* | ≡ ≡ ≡ ≡ | ⁝≡ ≡ ≡ ≡ | A ▾ A ▾ | 🔗 <>

Sale
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.

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

Sales Tax Codes

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

Tax Codes

ⓘ 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	Is Default?	Is Shipping Default?	Status	Actions
No Tax	0	No	No	Active	Edit Delete
Sales Tax	9	Yes	No	Active	Edit Delete

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.

BridalLive Pay

ALL IN ONE SUPPORT
One company to call for payment support software support and more.

TIPPING
Tips are a great way to motivate employees and an easy way to show gratitude for the great service they have provided!

PAPERLESS CONTRACTS
Customers can sign their sales agreements directly on the terminal, and then receive a copy of their signed invoice and agreement via email.
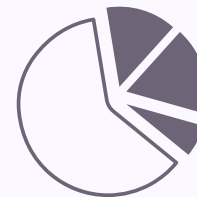
MEET OR BEAT GUARANTEE
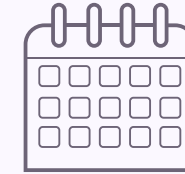The average retailer saves about 20% when they switch!

NEXT DAY FUNDING
We understand it's important to get your money quickly. We offer next day funding so you can keep things running smoothly.

EASY END OF DAY
With automatic reconciliation, you can close out your day with just a few clicks. Save time and get home sooner!

CHARGE FOR APPOINTMENTS
With the Standard Plus plan on BridalLive, customers can be prompted to securely enter card details for booking fees or last minute cancel/no-show charges!

PRE-AUTHORIZE PAYMENTS
Pre-authorization allows you to place a hold on an amount of money before completing the transaction. Especially helpful for virtual appointments or loaning out gowns!
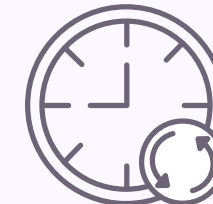
AUTOMATED PAYMENT PLANS
COMING SOON!

Additional Resources

Company Profile

Company Profile, Account Settings, Users & Security

Change Logo in Email Templates

Update BridalLive Payment Method

Users

Adding a User

Add User Work Schedule

Add/Edit User Roles

Video- Add Work Schedule & Time Off

Employee Time Off

Appointments & Fitting Rooms

Contacts and Activities

Appointment Scheduler vs. Request Form

Adding an Appointment

Video- Adding an Appointment

How to Setup Fitting Rooms

Fitting Rooms

Using the Calendar- Best Practices

Calendar Black Out Dates

Smart Book Algorithim

Smart Book Q&A

How Does the Smart Book Algorithm Work?

Sales Agreements

Edit Sales Agreements

Signing Sales Agreements with Digital Signature

MX925 (BridalLive Pay) Terminal Agreements

Digital Signature- Getting Started

Sales Tax

READ ME- Completing Orders & Layaways

How is Sales Tax Calculated in BridalLive?

Sales Tax Setup- Massachusetts ONLY

How to Setup VAT (UK) & GST (AU/NZ)

How BridalLive Calculates VAT (UK) & GST (AU/NZ)

Congratulations!

You've made it through the Getting Started Guide! An account manager will be in touch shortly when a payment method is added!

For your consideration, Client Portal offers a customizable, brandable, unique mobile experience. Check out our offering here.