

MoeGo Setup Checklist

 For **Salon**

Hi there, welcome to MoeGo! Now that you have completed your kickoff session, it's time to complete the MoeGo Setup. If you have any product specific question, please contact our 24/7 chat support.

Business

Settings	Details	Wiki Help Articles
<u>Set up Location(s)</u>	Create your salon business.	https://wiki.moego.pet/get-started-with-moego/
<u>Business Profile, Hours, and Holidays</u>	Set up business details, business hours, and advanced settings.	https://wiki.moego.pet/tag/moego-setup/
<u>Preferences</u>	Customize time format, currency and other preferences.	https://wiki.moego.pet/business-preference/
<u>Tax</u>	Set up the tax(es) for your services or retail products.	https://wiki.moego.pet/tax/
<u>Service Menu</u>	Add your service, add-ons, and service charges (if any).	https://wiki.moego.pet/tag/service-menu/
<u>Calendar Configuration</u>	Customize your calendar and appointment display under "Config."	https://wiki.moego.pet/calendar-config/
<u>Call Forwarding</u>	Forward calls from MoeGo number to your business line.	https://wiki.moego.pet/call-forwarding/

Staff

Settings	Details	Wiki Help Articles
<u>Role Setting</u>	Edit the role permission settings for each staff role.	https://wiki.moego.pet/access-control/
<u>Staff Members</u>	Create profiles and invite staff to access system with their own login.	https://wiki.moego.pet/staff-settings/
<u>Shift Management</u>	Set up staff working hours and schedules.	https://wiki.moego.pet/staff-shift-management/
<u>Payroll Settings</u>	Configure payroll calculation base, tip splitting, and special commission.	https://wiki.moego.pet/payroll-setting/
<u>Clock In/Out</u>	Enable staff clock in/out settings to record working time.	https://wiki.moego.pet/clock-in-out/

Payment

Settings	Details	Wiki Help Articles
<u>MoeGo Pay Account</u>	Set up your MoeGo Pay account to accept card payments.	https://wiki.moego.pet/moego-pay-overview/
<u>MoeGo Pay POS (Hardware)</u>	Browse and purchase a POS to accept card payments in-person.	https://wiki.moego.pet/moego-pay-wisepose-reader/
<u>Payment Settings</u>	Set up your payment methods, such as cash, Venmo, and card.	https://wiki.moego.pet/payment-methods/

Online Booking

Settings	Details	Wiki Help Articles
<u>Online Booking</u>	Complete your online booking setup: booking site, availability, and more.	https://wiki.moego.pet/online-booking-overview/
<u>Test and Publish Online Booking</u>	Publish your site and enable online booking to make your website live.	https://wiki.moego.pet/online-booking-landing-page/

Powerful Tools

Settings	Details	Wiki Help Articles
<u>Service Agreement</u>	Set up your service agreements to protect your business.	https://wiki.moego.pet/digital-agreement/
<u>Auto Messages and Reminders</u>	Set up auto messages for confirmations and reminders.	https://wiki.moego.pet/tag/messages/
<u>Intake Form</u>	Set up your intake form to ask clients to fill out their information.	https://wiki.moego.pet/tag/intake-form/
<u>Review Booster</u>	Set up review booster texts with your review links to gather happy reviews.	https://wiki.moego.pet/review-booster/

Optional

Settings	Details	Wiki Help Articles
<u>Clients and Pets</u>	Customize client tags, referral sources, pet breeds, codes etc.	https://wiki.moego.pet/tag/client-pet-database/
<u>Grooming Report</u>	Set up grooming report template to send updates to pet parents.	https://wiki.moego.pet/grooming-report/
<u>Marketing</u>	Set up discount codes if applicable.	https://wiki.moego.pet/tag/marketing-campaigns/
<u>Integration</u>	Set up integration between MoeGo and other applications.	https://wiki.moego.pet/tag/integration/

Testing/Training

Settings	Details
System Setup Test	Create a mock appointment or a mock day to ensure you are comfortable with any day to day operations. Go through scheduling appointments, sending messages, check in/out, taking payment.