Meevo® 2

Version: Q2 Release
Release Date: May 2018

New Features in Meevo 2

Meevo Store

- The Meevo Store allows your business to upgrade or downgrade your Meevo subscription and appointment notification text message plan, browse business booster options, and manage other third-party integrations, all from within Meevo.
- As of Q2 release, the Meevo Store will be available for single locations only.

QuickBooks Online Integration

- Create a connection between Meevo and your QuickBooks Online account!
- Once the connection is made, you can sync any day's financial data from Meevo to QuickBooks, on demand.
- This integration will be available shortly after Q2 release for businesses that reside in the United States.

Textel Integration

- Create a connection between Meevo and your Textel account!
- With this integration, you can select a button in Meevo that launches a separate Textel browser tab, where you can engage in two-way texting with your Meevo clients.
- Meevo client names and numbers appear in the Textel interface, and the "From" number is your business' phone number.
- This integration will be available shortly after Q2 release.

Transworld Integration

- Integrate your Transworld Systems account with Meevo!
- If a client owes outstanding recurring membership payments, you can send these details to Transworld. Transworld will then begin its debt collection process.
- This integration will be available shortly after Q2 release.

Salon Clouds Integration (Consumer App)

- The Consumer App, developed by Salon Clouds, empowers your clients to register and book appointments through the mobile app.
- If a new client registers using the app, Meevo automatically creates an associated client profile. Appointments booked through the app appear on the Meevo Appointment Book.
- The 5-Star Ratings System notification type integrates with the Consumer App.
- This integration will be available shortly after Q2 release for single locations only.

Paging System Integration

- This new integration alerts an employee via a paging device. Alerts include: appointment added, edited, moved, deleted, and client running late. Pages occur for today's appointments only.
- For this integration, your businesses must purchase pagers for each employee and a transmitter (both purchased through TIE National).
- This integration will be available shortly after Q2 release.

Emma Marketing Integration

- This integration provides your business with Emma's email marketing tools.
- Set up automated campaigns such as New Client Welcome, Retained Client Re-Book, New Client Re-book, Missed Appointment, We Miss You, Happy Birthday, and more.
- Emma provides A/B content testing, responsive design, email analytics, and more.
- This integration will be available shortly after Q2 release.

New Feature: Field Labels

- Customize your Meevo experience by replacing common words in Meevo. For example, you can replace **Service** with **Treatment**, or **Employee** with **Therapist**.
- The following labels can be changed: **Service**, **Employee**, **Appointment**, **Appointment Category**, **Client**, **Packages**, **Tips**, **Products**, and **Resources**

New POS Hardware Support

- Added support for the legacy Bematech/LogicControls pole display and the Star Micronics tabletop/pole display.

Reports

New Reports

- **DC042: Restricted Clients** – Displays a list of clients whose profiles indicate that they are restricted.
- **AQ012: Missed Opportunities** – Displays Missed Opportunities that were entered into Meevo.
- **COCO000: Offsite Liability Transfers** – Shows liabilities that were transferred between locations.

Enhancements to Existing Reports

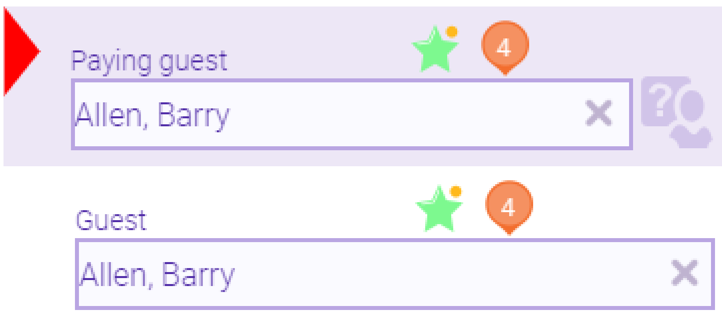
- **MR075: Refunds Processed** – Added **Tax Refunded** column.
- **MR129: Liability Summary** – Added point campaign and point promotions, Client Accounts, and offsite usage to the Liability Summary mode.
- **DE040: Employee Payroll** – Added **Detailed View** to the report setup screen.
- **MR080: Register Summary** – The **Combine Drawer Totals** option has been replaced with the **Display Detail for Drawers Selection** option. This option displays a combined totals page for all selected drawers in addition to details on each selected drawer.
- **DB015: Membership Status** – Added a secondary mode to the Frozen Members section that displays freeze fees collected.
- **Date/Time Range Throttling**: Report date/time ranges have been revised to improve performance when generating reports.
- **Virtual Drawers**: A virtual drawer will not be selectable for a report if the drawer does not have a transaction associated with it. In addition:
    - **Appointment Book Drawer** will only appear if register is *not* enabled.
    - **External** has been renamed to **eGift Drawer**. This drawer will appear in reports only if eGift is enabled *and* if there is a transaction associated with the drawer.
    - **Membership** is renamed to **EFT Billing Drawer**. This drawer will appear only if there is a transaction associated with it.
    - **Conversion Drawer** is new; for businesses converting to Meevo 2 from Millennium, this displays transactions brought over from the conversion process.

Improvements and Enhancements

Appointments

Appointment Book

- The Appointment Book experience is improved when using a tablet or mobile device. Gestures are smoother and the typical “swipe” is now available.
- The Appointment Editor can be minimized by selecting the red arrow in the top-left corner. This allows a user to view more of the Appointment Book when needed.

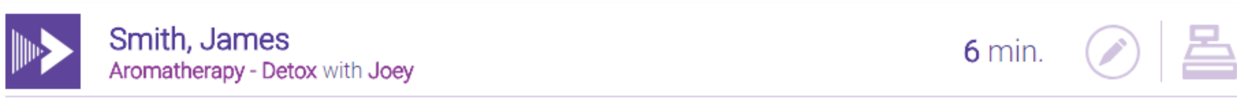


- If a client’s membership includes discounts, the discounted price will be reflected in Appointment Editor.
- Blocks in the Appointment Book can now be copied using the Smart Assistant.
- The **I** icon was added next to the service in Appointment Editor; select this icon to view the service details. The service definition’s **Short Description**, **Long Description**, **Shortcut**, **Category**, and **Sub-Category** are displayed.

- Added an option in Business Information that displays a notification when a client who has a membership credit card with no ZIP code is added to the Appointment Editor. The membership must be active for the notification to appear.
- When undoing a check-in in the Appointment Book, a new prompt gives the user the option to undo check-ins for all of the client’s checked-in services on the book today, even if they are across multiple appointments.
- When dragging and dropping a service, the service will remain in the originally booked resource when possible.
- **Block Definitions** have been renamed to **Standing Blocks**.
- Other Appointment Book filter and UI improvements.

Walk-in Manager

- Appointments booked through Walk-in Manager can be checked-out in Walk-in Manager from the **In-Progress/Complete** list. Select the Register icon to launch the register.



- The **Assign** button was removed from Wait List and replaced with the **Book Now** button. This should make the Walk-in Manager booking workflow more intuitive to users.

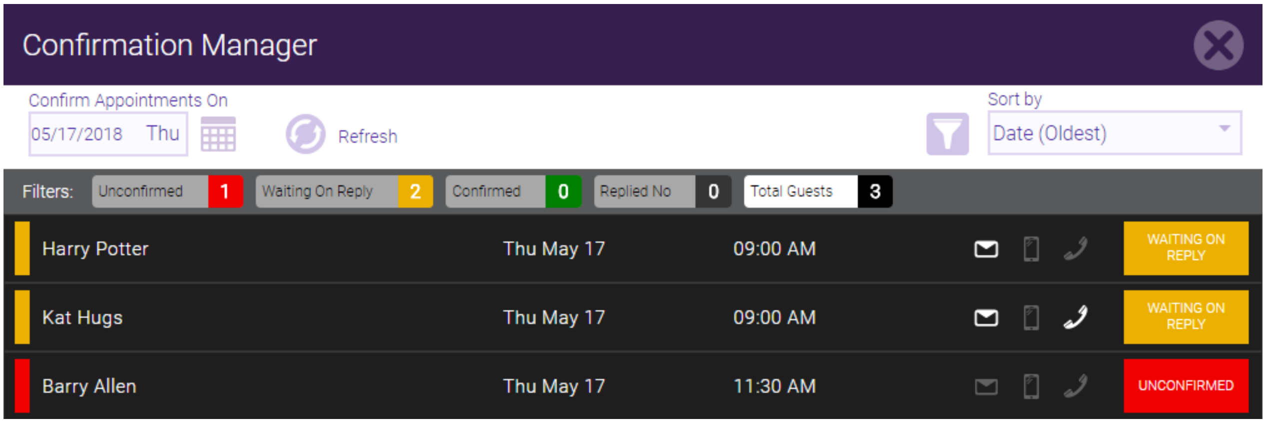
- **Walk-in Management** is being added to the Meevo Store.
- Other UI Improvements.

Walk-in Manager Kiosk

- We made updates to the Walk-in Manager Kiosk interface that will help guide clients to the correct area of the manager:
    - The **Check-in** button was renamed to **Already On the Wait List? Let Us Know You Are Here**.
    - The panel on the right now says **Select A Service To Check In**. This is for clients who haven't been added to the Wait List yet.
- Added the following options to Walk-in Manager Settings:
    - **Enable ability for a client to notify the business that they have arrived and will wait in waiting area**: When enabled, the **Guess will wait in waiting area** option will be available when a user is adding a client to the Walk-in Manager.
    - **Show address fields in Kiosk and Online Wait List**: When enabled, clients must add their address as part of the booking process. Disable this option to hide this step from clients.
    - **Hide wait time estimate**: Hides client's estimated wait time from Wait List Kiosk.
    - **Default to first available employee and skip selection in Online Walk-in and Kiosk**: When enabled, clients booking through Online Wait List or Kiosk do not have the option to select a specific employee. This option is still available in the Walk-in Manager.
    - **Enable Wait List text notifications**: When selected, clients receive text notifications regarding their position in the queue.
- Added sort options to the **In-Progress/Complete** list.
- Other Kiosk UI Improvements.

Confirmation Manager

- The Confirmation Manager interface was completely overhauled to improve usability and tablet/mobile device experience.



Scan for Opening

- Added **Scan for opening results options** to Business Information, which determines if one random employee or multiple random employees are returned per available time slot.
- Maximum appointment openings shown per day was increased to 20, giving the user even more booking options to choose from.

Employees

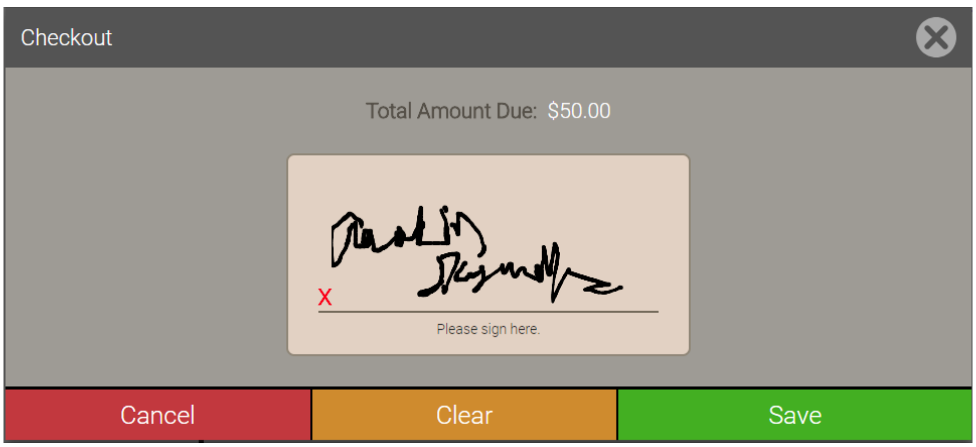
Employee Profiles

- When creating and saving an employee profile, a prompt appears that allows a user to automatically create an associated client profile. This client profile is used when an employee wishes to make a purchase or receive services.
- Added **Select default employee membership** option to Business Information, which displays a list of employee-only memberships. If a membership is selected in this drop-down, Meevo automatically assigns a membership to the associated client profile when saving a new employee profile.

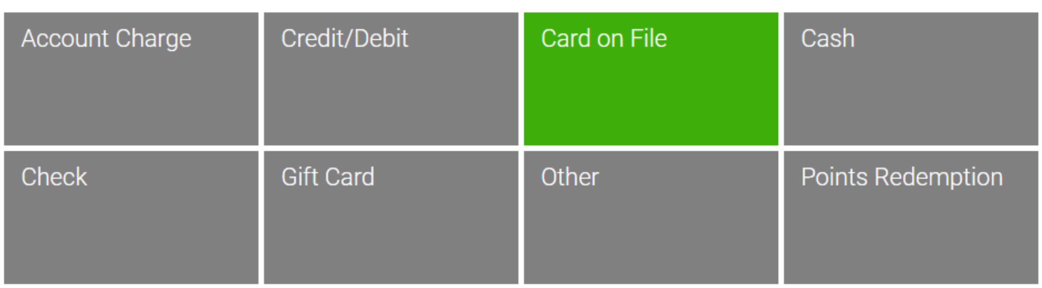
Clients

Client Cards on File

- We implemented chair-side checkout capabilities! We added a setting to the Drawer form that allows you to decide how signature (and, if your device allows, tip) flows work for Card on File scenarios. These options are specific to that drawer. For chairside checkout, configure these options on a drawer named **CHAIRSIDE** (or something similar) and link your tablets or phones to this drawer using POS Stations.
    - **On screen**: Clients can sign using their finger on touch-ready devices or using the mouse on laptops/computers. Select this option for chair-side checkout!
    - **Print**: Clients sign on a printed receipt.
    - **Prompt for user to choose**: The user is presented with the option to do either.



- Client **Card on File** is now its own Payment Type.



Client Points

- Added additional point promotions for purchases of gift cards, memberships, retail items, and services.
- Voiding a transaction where points were earned or spent will reverse the points transaction as well.
- Added a filter of various point statuses to the Client Points Manger History screen.

Management

Online Booking

- My Search now displays employee-specific pricing to the client, not a price range, once an employee is selected.
- Various workflow enhancements to Online Booking.

Market Pricing

- Added the ability to set the membership **Minimum Enrollment Fee** at the Market Pricing level.
- This feature is for multi-location businesses only.

Basic Marketing

- Added an **Export all clients** option that will export all non-minor clients who have an email address.
- Minor changes to UI and workflow.

SmartCenter Tiles

- **Monthly Recurring Revenue**: Membership tile that displays the sum of all monthly EFT payments.
- **Membership Conversion %**: Membership tile that displays clients who buy a membership on the same day they had a service performed.
- **Walk-in Manager** added to shortcut tile
- **Walk-in Manager Kiosk** added to shortcut tile
- **Walk-in Display** added to shortcut tile

Payroll and Commission

Employee-specific Commission Overrides

- Employee-specific commission overrides can now be set up in the employee's profile regardless of the settings in the service definition. That dependency has been removed.

  More on this update: Prior to the Q2 release, in order to set up an employee-specific commission override, you first needed to select the commission override checkbox in the Service definition. This was not an optimal solution, as selecting that checkbox in the Service definition and *not* setting up an employee-specific commission override meant that the employee would receive commission based on the service definition, and never based on their commission scale. Removing the Service-Employee dependency resolves that issue.

Compensation and Deductions

- Service commission can be set in Central Office, and overridden by a location if necessary.
- The **New Client Deduction** option has been renamed to **First Time Purchase Deduction**. This deduction is applied if it is the first time an employee is performing that service on that client within that location.
- Renamed **California Overtime** to **Advanced** and updated calculations for this overtime type.
- **Requested** commission overrides can be set to a percentage or amount.
- Spiffs can now be split evenly among eligible employees if the **Split Spiff** option is selected under Payroll Settings.

Memberships

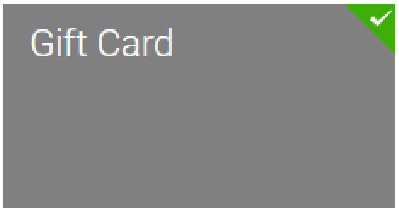
EFT Control Panel

- To improve performance, the selectable date range will be limited depending on the **EFT Status** filter selection.

Register

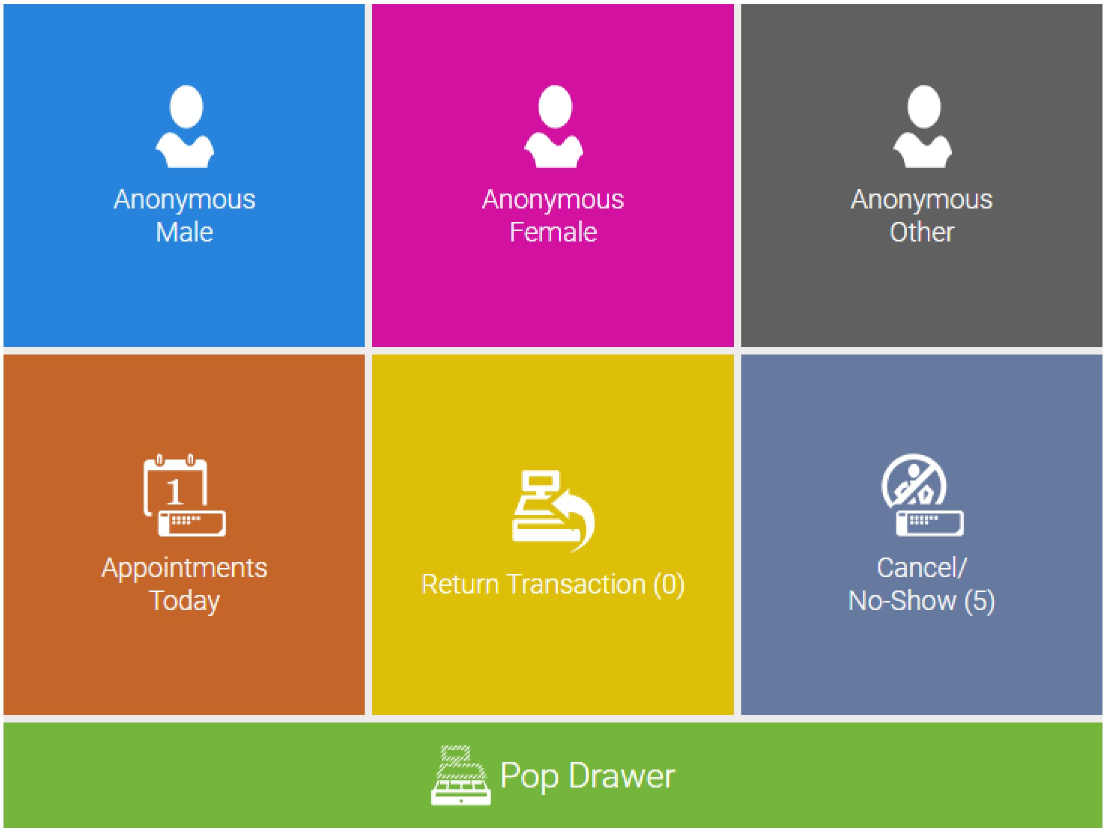
User Interface and Workflow

- When creating a transaction for a client who is purchasing a gift card or package, users can easily, from the Smart Receipt, edit who the item is being purchased for from the **Gift Card Recipient** field.
- Added an option to Business Information that toggles on or off the green checkmark that appears on **Gift Card** payment type when a client has a gift card balance. Businesses can turn this option off to prevent notifying staff that there is a gift card balance, a common avenue of theft.



- In **Refund** mode, purchased items also appear with date and quantity purchased info.
- Membership Enrollment Fees can be discounted at the register.

- Added a **Pop Drawer** button to the client selection screen in the register.



- Added a field to the **Cancel/No-Show** tile that displays the date and time that the appointment was cancelled/no-showed.
- Added a new package redemption icon for Swap Upgrades; this icon appears with a plus (+) symbol.
- If a client who has an in-progress, On-Hold transaction is added to the register, the recovered transaction is automatically brought into the register as well. This is a great feature to avoid a mismatch between Meevo and your Merchant Account.

  More on this update: Meevo autosaves a transaction as soon as a full or partial credit card payment is processed (when it appears on the Smart Receipt). We do this to protect your transaction in the event that the internet goes down or the register is closed before the transaction is finalized. These saved transactions are considered **in-progress** and can be located and finalized by selecting the **Return Transaction** option in the register's client selection screen. Now, in Q2, you can also create a new transaction by adding that client to the register, and the in-progress transaction associated with that client is automatically added to the Smart Receipt.
- Improved the filters that appear when purchasing a gift card; promotional cards can now be filtered.

Drawers

- Chair-side checkout is here! See the Client Cards on File section for details.
- Users can now insert a pay in or pay out while editing a drawer closing.
- Deposit slips can be reprinted from Drawer History.

Account Charges

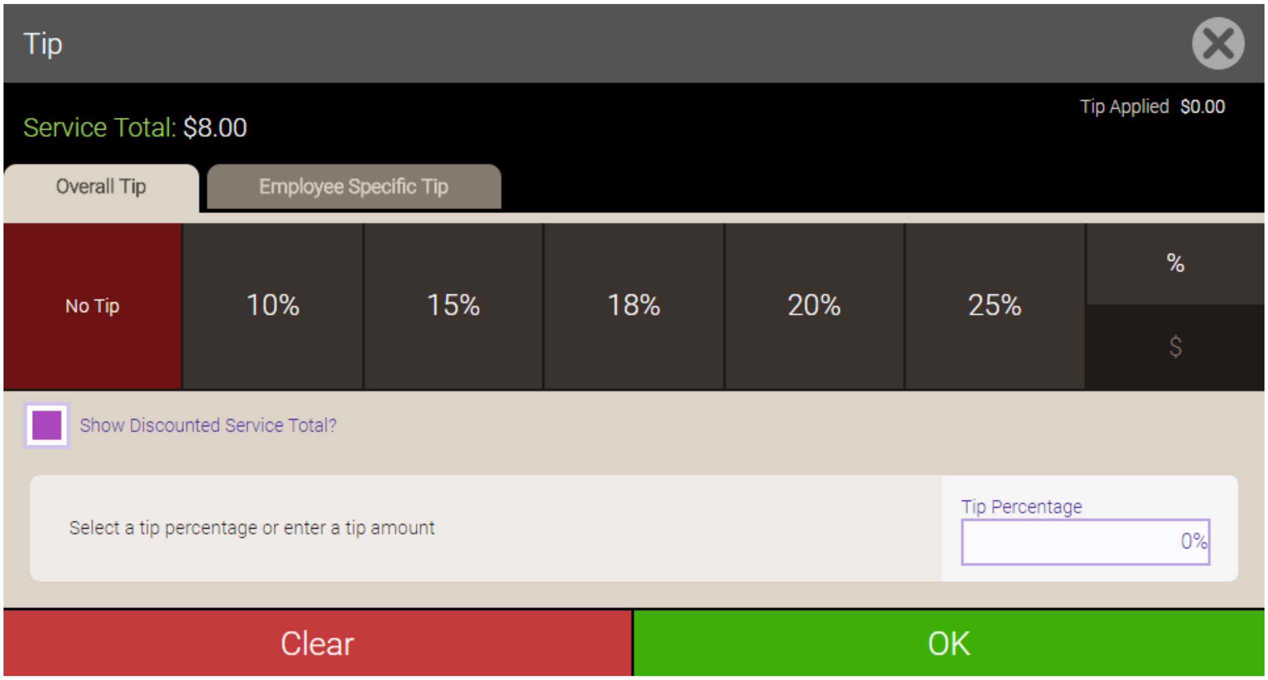
- Added logic that restricts finalizing a transaction if the sum of account charges exceeds the total amount due.
- Payments and credits to a client account cannot be paid for by charges and refunds against the same account.

Transaction Editor

- Selecting a client's name in Transaction Editor brings you to the **Main** tab of the client's profile.
- Added the ability to edit the **Gift Card Recipient** in Transaction Editor.

Updated Tip Window

- The Tip window has been redesigned for a better user experience and now allows for easier **Overall Tip** and **Employee Specific Tip**.



- Users can now input a specific dollar amount, and if there are 2+ employees, that amount will be divided evenly among them.

- Custom tip amounts (% or $) can be added in Business Info; these custom amounts appear in the tip modal, not the credit card device.
- Pre-paid tips (for Packages, for example) are proportionally assigned to employees who are credited with performing the services.

Receipts

- Various changes to UI to account for internationalization.
- Tax is now included on an insurance receipt.
- Package redemption information and gift card numbers now appear on the detailed receipt.
- The business image, which can be uploaded in **Business Information** > **Main** screen, now appears on emailed receipts.

Taxes

- Added the **Include Tax in Price** option to **Currency and Tax**; this appears when United Kingdom is the selected country.

Products and Inventory

Product Definitions

- Products previously created with an attribute (**Color**, for example) can now be edited to add additional values to the attribute.
- Added security to each local override field in the Product definition.

Inventory

- Inventory UI improvements, including:
    - **Product Info** button added to Inventory Count screen.
    - Switching Floor Locations via the filter maintains an aggregate when performing an Inventory Count.
    - Additional filtering added to Stock Levels.
    - **SKU/Code** added to the Product Name in list view of Stock Levels.

Merchant Accounts and Processors

- Added support for **PaymentSense** as a processor, which can be utilized by businesses in the United Kingdom.
- Added recurring membership billing support for the **CardConnect** processor.

5 Star Ratings

- The **5 Star Ratings** notification tile now has an option to display the details of submitted ratings, which includes notes that were entered by the clients. Security can be set to allow the employee to view ratings, but secure access to the detail view.
- An employee's average rating will appear on the employee profile's **Main** tab.
- Added an option to client profiles that allows for the opting out of this 5 Star Ratings notification.

Convobar

- Depending on your convo, the Appointment Book will prioritize the columns. For example:
    - Convo 'today or tomorrow with alana or clara' – the *date* columns appear at the top of the Appointment Book.
    - Convo 'alana or clara tomorrow or Tuesday' – the *name* columns appear at the top of the Appointment Book.
- Added ability to type a report number and bring up the report. Note that the report code must be in all caps, as it appears on-screen in Meevo.

General Improvements and Other Changes

- Added a **Search Count** button to the following forms: **Clients** search, **Services** search, and **Products** search. Selecting this button displays the number of active records for that item.
- In many areas of Meevo, the **Employee** selection field is now a searchable drop-down, rather than a type-ahead, auto-fill field.
- Updated some fields to work more smoothly with mobile devices.
- Various UI enhancements and consistency improvements.