DAILY SUCCESS CHECKLIST

Every Morning

- [ ] Sign in to your account. Or, check Remember Me so that you will not have to log in each time you visit.

- [ ] Go to Calendar to see the Calendar for the day or week.

- [ ] Check the Notifications tab to view a provider's appointments.

- [ ] Check all current scheduling tools, including paper calendars, to make sure all your appointments are in Yocale. If an appointment is not in Yocale, add the appointment by selecting the time slot on the calendar and completing the fields in the window. Make sure to enter an email address for a new client. If you don't have an email address, then block off the time for now. When they visit, create a new client record.

- [ ] Place your easel board on the table where people can't miss it.

- [ ] Place a tablet/computer in a visible location so people can register online.

- [ ] Keep the Email Signup Sheet handy in case you do not have time to create new client records on the spot.

Throughout the Day

- [ ] If the client is a new client or a current client that hasn't been added to Yocale, select Add a New Client from the drop down and complete the fields in the Add Client window. Make sure to enter their email address otherwise they will not be able to book online.

- [ ] While people are waiting, use your Easel to walk them through the benefits of booking on Yocale. Enter them as a new client. Or, direct them to the tablet/computer in your waiting room or to the Yocale Email Signup Sheet. Make sure you have collected an email address otherwise they will not be able to book online.

☐ To keep your online schedule up-to-date, add all walk-ins or bookings made by phone to Yocale. When adding new clients, always ask for their email address otherwise they will not be able to book online.

☐ Add follow-up appointments to Yocale. Choose a customer from your Client list. Click on email and choose the kind of follow up email you would like to send and how frequently you'd like to send it. You can also recommend a type of service. For example, at a Dental Office you could send a dental hygiene cleaning reminder every 6 months.

☐ If a client calls to change their appointment, go to your Calendar, find their appointment and drag the appointment to the new time slot. To drag the appointment, hold the pointer cursor on the top panel of the time slot near the time shown. The pointer cursor will change to a hand cursor allowing you to drag the appointment to the new time slot. Alternatively, you can click on the body of the appointment and select Edit Appointment to change any details of the appointment. For example, if a client has booked the wrong type of appointment, you can change the type of appointment and automatically notify the client that the right appointment is now booked.

☐ After every appointment, mark the appointment as complete. Click on the body of the appointment in the Calendar and select the checkmark on the left hand side to confirm the appointment is completed. Be mindful in how you mark a client. Indicating a client was late, for example, impacts their overall trust score with all providers on Yocale. When you mark an appointment as complete, it automatically sends an email reminding them to give you a review.

☐ Encourage clients to favorite your business by clicking the heart icon on your Profile page. So next time, all they need to do is open the Yocale app on their phone or go to Yocale.com, go to their favorites, and book you again in just a few steps. Note: if you add the client and enter their email address, this step takes place automatically.

☐ Ask people to share your Profile on Facebook by clicking the Facebook icon on your Yocale Profile.

☐ Let clients know that they'll receive a follow-up email, and ask them to write a review. Clients can write reviews after the service, by visiting Yocale, My Appointments, Write a Review.