



STAFF GUIDE · GRADESPACE SALON

Running your salon's website: a guide for your team

Everything your team needs to run the website day to day, in plain words.

Gradespace Salon
for WordPress, version 0.1.0

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This guide covers the website day to day: appointments, the diary, the team, clients, gift vouchers and the rest of the site. You don't need any technical knowledge.

Features marked **(Pro)** need a Pro or Agency licence.

1. Signing in

- Go to your website's address followed by **/wp-admin** (for example `yoursalon.com/wp-admin`), or click **Staff sign-in** at the very bottom of any page.
- Sign in with your own username and password. Please **don't share accounts**: the website records who did what, and each person should only see what their job needs.
- After signing in you go straight to **Salon → Today**.
- Forgotten your password? Click **Lost your password?** on the sign-in page. After 5 wrong passwords, sign-in pauses for 15 minutes.

2. Your daily start: Salon → Today

- **Today's appointments**, in time order, with who's doing each one.
- **Requests to confirm** (only if you don't confirm bookings straight away).
- **New messages** from the contact form, and what's coming up.

The red numbers on the left-hand menu show how many things are waiting.

3. Appointments

When a client books online

1. They choose one or more services (up to three, done one after another), then a stylist or **Anyone**, then a free day and time. The website only offers times when that person works, isn't on a break or a day off, has nothing else booked, and the salon is open. **Anyone** gives the first person free.
2. They say whether they've been before, and (for colour, tint and lash services) whether they've had a patch test in the last six months. If not, the website books a free **patch test** with the same stylist at least 48 hours before, and tells them.
3. By default the booking is **confirmed straight away**: the client is emailed a confirmation with a calendar invite and a link to change or cancel; the salon and the stylist are emailed too. To check each booking first, untick **Settings → Bookings → Confirm online bookings straight away**: bookings then wait in **Requests to confirm** and the time is held meanwhile.
4. **Deposits (Pro, with online payments switched on)**: for services with a deposit, the client pays it on a secure card page before the booking is confirmed. The time is held for 30 minutes while they pay. A gift voucher code can pay the deposit.

Phone and walk-in bookings

Salon → Add appointment: choose the client (or type new details), the services, the stylist and the time. Staff can book outside someone's usual hours, as long as they're free. Untick **Email the client** if you don't want a confirmation sent.

The diary

Salon → Diary shows the day with a column per stylist (and week and month views). Click an appointment to open it. Days off and breaks are shaded.

Changing an appointment

Open it from **Appointments** or the diary:

- **Move:** pick a new day, time or stylist from the free times. The client and stylist are emailed.
- **Done:** when the client has been. With the loyalty card on, this adds a stamp.
- **Didn't come** or **Cancel**. When a client cancels in time, a deposit is refunded or kept according to **Settings → Payments → When a customer cancels in time**.
- **Paid in the salon:** for a deposit taken at the desk instead.

Clients can change or cancel themselves with the link in their email, up to the cut-off you set (**Settings → Bookings → Clients can change or cancel up to ... hours before**).

4. Services and prices

Salon → Services. Each service has:

- **Time:** minutes with the client, plus **processing** (colour developing) and **finishing** time, and gaps before or after for clean-up.
- **Price:** fixed, "from", "on consultation" or free, with a short note.
- **Who does it:** tick the team members. Leave it empty for everyone.
- **Times and prices for particular people**, one per line, for example Mia Hart: 75 min, £58 .
- **Needs a patch test**, **Bookable online**, and **Offer as a gift voucher** (fixed prices only).
- **Deposit (Pro):** none, a fixed amount, a percentage or the full price.

Group services with **Service categories** (Hair, Colour, Barbering, Nails...). The order of the categories is the order on the website.

5. The team

Salon → Team: photo, name, role ("Senior stylist · curls"), specialities, Instagram, and in the side panel their **working hours, breaks, days off and holidays**, an extra gap between appointments, their email (for their appointment emails) and their sign-in.

Give a stylist their own sign-in with the **Stylist** role: they see only their own appointments and diary and can change their hours under **My hours**. The **Reception** role manages every appointment, client and the team's hours. Editors get none of this unless you tick it on **Staff access** (Pro).

6. Clients

Every booking makes or updates a client record (**Salon → Clients**): contact details, every visit, their patch-test date, notes, the loyalty card and packages.

- **Loyalty card (Pro):** switch it on in **Settings → Loyalty**: a stamp for each finished visit, and a reward when the card is full (for example "every 6th cut free"). On the client's page: **Add a stamp, Take one off, Reward given**.
- **Packages (Pro):** courses of visits sold up front (for example 6 laser sessions). Set them up under **Salon → Packages**. Clients can buy them online with online payments on, or record one under **Sold in the salon**. When they book that service, a visit is used and no deposit is asked; a cancelled visit goes back.
- **Records: Settings → Records** sets when client records come up for review (24 months after the last visit by default). **Clients → Due for review** lists them; delete only what you no longer need. Appointments stay for your figures, without the person's details.

When someone asks for their data, use WordPress **Tools → Export Personal Data** or **Erase Personal Data**: the salon's records are included.

7. Gift vouchers and the shop

- **Gift vouchers (Pro, with online payments):** on the **Gift vouchers** page people buy an amount or a named treatment, for themselves or sent by email to someone. **Salon → Gift vouchers** lists them; use **Redeem** when one is spent in the salon. Clients can also type a voucher code when booking, towards the deposit.
- **The shop (with WooCommerce):** products you sell (shampoo, aftercare). The **Products** section on the home page shows the featured ones. Orders are set up for collection in the salon.

8. Settings

Salon → Settings:

- **Business** and **Contact**: name, phone, address, social links (shown in the header and footer).
- **Bookings**: online booking on or off, confirm straight away, how much notice and how far ahead, the time grid (every 15 minutes), the gap between appointments, the cancellation cut-off and policy text, patch tests, walk-ins ("Walk-ins welcome" strip and today's wait), and whether prices show.
- **Opening hours**: the salon's weekly hours and closed days. A team member without their own hours works the salon's hours.
- **Payments (Pro)**: online card payments, deposits and gift vouchers.
- **Loyalty (Pro), Records, Privacy, Licence**.

Appearance → Design & colours: four designs (**Blush, Barbershop, Studio, Luxe**), each with seven colour palettes. Each design shows its own sections on the home page.

9. Photos

The sample photos are from Pexels, with the photographers credited on the **Photo credits** page and in each photo's caption. Replace them with your own: open the service, team member or page and change the image. When you've replaced them all you can unpublish the credits page.