Walk-In Manager: Owner & Manager Getting Started Guide

Walk-In Manager · https://haircutnow.com/docs/walk-in-manager-owner-manager-getting-started-guide/

Walk-In Manager helps owners and managers organize client check-in, team availability, and fair walk-in rotation.

1. Create your business

Sign in at Haircut Now Shops. After checkout, complete **Create my business** with your name, business and location names, street address, and the shop's **Business time zone**.

You can complete this step from anywhere. Device location permission and an accurate GPS reading are not required to create the business. Both check-in methods need the shop's precise location for team check-in. Save it later while at the shop using your phone or tablet.

Choose your customer check-in method

Tablet kiosk — recommended: a shared check-in screen with the public waiting list. **QR phone check-in — no dedicated kiosk equipment:** clients scan the shop's sign and check in on their own phones.

Choose either method. You do not need both, and you can change your setup later. Select your preferred method after creating the shop to open its setup steps.

2. Customize the client experience

Open branding and save the business name, logo, colors, booking link, and review link you want clients to see.

3. Add your team

Invite team members through the dashboard. Each person uses their own account. Membership alone does not put someone in the daily rotation: they must check in for the day and have working, verified alerts.

4. Set shop location and finish your chosen check-in setup

At the business, choose **Set shop location**. Use your phone or tablet with precise location enabled, capture its current location, review the address and team check-in radius, and select **Save business location**. Continue to your chosen kiosk or QR setup.

You can add your team and configure your account before saving the location. Both check-in methods need the saved shop location for team check-in; QR-only setup does not require a paired kiosk.

On the client tablet, open the kiosk address shown in your dashboard. Name the tablet, choose **Create pairing code**, and enter the code on the tablet. Confirm the business name. See the kiosk setup guide.

QR-only setup

Set shop location → Enable QR check-in → Download or print sign → Display inside shop. Use the QR section of your dashboard to enable check-in and download the sign. Customers do not need an account, app download, GPS permission, or device pairing. Their phone shows check-in confirmation and their own status, not the full public waiting list.

Finish team setup. Team members still sign in, verify alerts, check in at the shop, and receive offers normally. You can finish QR-only setup without pairing a tablet.

Switch methods later

From QR setup, choose **Set up a kiosk**: open the kiosk URL on the tablet, generate a pairing code in the dashboard, and enter it on that tablet. Once ready, you may turn QR off and remove its sign, or keep both methods available. From kiosk setup, choose **Use QR check-in instead**, enable QR, and download or print the sign.

Switching preserves your shop, team, queue, history, and subscription. It does not automatically disable QR, revoke a kiosk, or create another location.

5. Choose whether to use service routing

Service-based routing is optional and off by default. With it off, clients enter their name. With it on, clients first choose one of your custom services.

In **Service-Based Walk-In Routing**, add services and save each team member's **Permanent qualifications** before turning routing on. At least one active service must be assigned to an active team member. Staff can pause an assigned service for their current shift but cannot add their own qualifications.

The system keeps one shared rotation and filters it by the selected service and current eligibility. Clients do not choose a specific team member at the kiosk.

6. Prepare alerts and daily check-in

Ask each working team member to sign in on the phone they will use, enable and verify alerts, and check in at the business. Phone check-in still checks their location against the shop's check-in area. Creating the business without GPS does not remove this daily check-in requirement.

Confirm that the team's alerts are connected and eligible members appear Ready. Use the staff guide and alerts troubleshooting guide.

7. Review timing and complete one test

Set your offer response time and minimum service-completion time. Complete one test walk-in: kiosk or QR check-in → offer → Accept → two-minute client verification → automatic service start → Mark Complete after the minimum service time.

During the two-minute Accepted window, the assigned team member can use **Walked Out** or **Not a Walk-In** when appropriate. Normal service starts automatically; there is no routine Start Service step.

Daily operation

- Check that your chosen kiosk or QR method is ready and walk-in sign-in is open.

- Confirm working team members have checked in and verified alerts.
- Review service availability when service routing is enabled.
- Monitor the queue and record correct outcomes.
- Use reports to review results and Today’s Activity to see current-day team visits.

Passing preserves a team member’s rotation place. Ready returns an eligible team member from Busy to their preserved place. Visible positions include eligible Ready members; when service routing is on, positions depend on the selected service.

The working rotation resets on the business’s local calendar day. Team members check in again for each new workday.

Manager administration

Owners use **Account → Manage managers** to open the product’s **Administration** area and grant WIM management or report access. Managers can administer the product without joining the daily rotation. Billing and manager administration remain owner-only. See team and manager guidance.