

SALONTECHNOLOGIES

---



# Quick Start Guide

---



## TABLE OF CONTENTS

<b>Getting Started.....</b>	<b>1</b>
<i>Loading Your Own Handheld .....</i>	<i>1</i>
<i>Registering Your PSA Software .....</i>	<i>1</i>
<b>Starting the PSA Software.....</b>	<b>2</b>
<i>Backing-up your PSA.....</i>	<i>2</i>
<b>Settings .....</b>	<b>3</b>
<i>Personalizing Your PSA .....</i>	<i>3</i>
<i>Schedule .....</i>	<i>3</i>
<i>Services.....</i>	<i>4</i>
<i>Color Line.....</i>	<i>5</i>
<b>Clients .....</b>	<b>6</b>
<i>Entering New Client Information .....</i>	<i>6</i>
<i>Entering Client Formulas .....</i>	<i>6</i>
<i>Checking Client History.....</i>	<i>7</i>
<i>Deleting a Client .....</i>	<i>8</i>
<b>Schedule.....</b>	<b>9</b>
<i>Calendar Views.....</i>	<i>9</i>
<i>Day View .....</i>	<i>9</i>
<i>Scheduling a New Appointment from the [Schedule] .....</i>	<i>10</i>
<i>Changing an Appointment from the “Day” View .....</i>	<i>10</i>
<i>Changing an Appointment from the “clients” Application.....</i>	<i>10</i>
<b>Register.....</b>	<b>11</b>
<i>Checking Out a Scheduled Appointment.....</i>	<i>11</i>
<i>Checking Out a Walk-In Appointment .....</i>	<i>12</i>
<b>Formulas .....</b>	<b>13</b>
<i>Entering a Client’s Formula Information.....</i>	<i>13</i>
<i>Using the “Refresh” Tab .....</i>	<i>14</i>
<i>Using the “Parameters” Tab.....</i>	<i>14</i>
<b>Reports.....</b>	<b>15</b>
<i>Daily Closeout.....</i>	<i>15</i>
<i>Closeout History .....</i>	<i>15</i>
<i>Gift Certificate List .....</i>	<i>15</i>
<i>Transaction History .....</i>	<i>15</i>

---

## Chapter

# 1

# Getting Started

*Welcome to PSA, your Personal Salon Assistant.  
PSA puts your business in the palm of your hand.*

PSA is already installed in your new *HP iPAQ* handheld computer.

### *Loading Your Own Handheld*

---

If you have ordered the PSA software to be downloaded onto your own handheld, you must first connect your PDA to your computer then put the CD that came with your handheld into your CD Drive and load Active Sync by following the prompts. After you have successfully loaded Active Sync place your PSA CD into your CD Drive and follow the prompts. Your PSA is now ready for use. Please see full User Guide for complete instructions. Please refer to the separate installation instructions in the complete PSA User Guide. Please call us with any questions at 877-524-1186.

### *Registering Your PSA Software*

---

If you purchased your PSA with a handheld, it will be preregistered. Thirty days prior to your registration expiring, you will be reminded at the bottom of the main screen to reregister. To do so, call 1-877-524-1186 or go online to [www.salontechnologies.com](http://www.salontechnologies.com), go into your account and re-register.

To register your software at any time, call SalonTechnologies at 877-524-1186. Tap [Settings] then [System] and read the 20 digit product key to us. We will then give you a new registration key; just Tap [Register] to type it into your PSA.

## Chapter

## 2

## Starting the PSA Software

After successfully installing the PSA software onto your mobile device, you must complete the following steps to begin using your PSA program. For complete information, please see the full User Guide.

- For your convenience we have created a quick launch button for you. We have reprogrammed the record button to activate your PSA program. This prevents accidental recordings and gives our users quick access to the program they need most.

1. Tap **[Start]**.
2. Tap **[Programs]**.
3. Locate and Tap on the “PSA” icon. The PSA program will start!



- After it has been started the first time, the PSA icon and name will appear in the “Start” drop-down menu. For subsequent starts, Tap **[Start]** then **[PSA]**.

### ***Backing-up your PSA***

---

To connect your HP iPAQ to your PC using Active Sync or Windows Mobile Device Center, please see the HP manual or call us toll free at 1-877-524-1186.

To back-up (COPY) to an SD Card, follow these instructions:

SD CARD: From the Start Menu, Tap [Start], Tap [Programs], Tap [File Explorer], At the top of your screen you will see a gray menu bar, click on the little arrow and choose [My Device] from this menu, Tap [Program Files], Tap [PSA Solo], Tap [Database], Tap and Hold on PSASolo, The option menu will pop up then Tap [Copy], Tap [Storage Card], Tap [Menu], Tap [Edit], Tap [Paste].

We recommend creating a backup folder on your PC for your PSA backups. To back-up (COPY) to your PC, follow these instructions:

PC: Sync your handheld to your PC. From the Start Menu on your PC go [My Computer], Click on [C: Drive], Click on [Mobile Based Device], Click on [My Windows Mobile Based Device], Click on [Program Files], Click on [PSA Solo], Click on [Database], and then right click on [PSASolo.sdf], The option menu will pop up then choose [Copy], Go to the folder you created for your backups and Right Click and Choose [Paste] this file will be added into your SalonTechnologies folder that you have created.

# Settings

## Chapter

# 3

The “**settings**” application of PSA allows you to customize the program according to your personal business. This is where you specify your schedule, color line, products, and services. This is also where you will back up your files. Please see full User Guide for complete information.



### Personalizing Your PSA

1. Tap **[Start]** then **[PSA]**. Your PSA software will open.
2. Tap **[Settings]**.



### Schedule

The Schedule section under **[Settings]** allows you to specify your working hours for each day of the week. Please see full User Guide for complete information.


1. Tap **[Schedule]** from the pull-down screen and select the beginning and ending hours you will work. For the days you are not working, select the blank space above 12:00 AM on each day.
2. When you have entered your weekly schedule, Tap **[Save]** then **[Close]**.

## *Services*

The **[Services]** section under **[Settings]** allows you to specify the various services you provide to your clients such as cuts, coloring, and manicures. Please see full User Guide for more information.

1. Tap **[Schedule]**.

2. Tap **[Services]**.

 Your PSA comes pre-loaded with a list of general services that you can customize to reflect your own business. There is no limit to the number of services you can add.

3. Tap **[Add Service...]** to enter your services.

4. Tap on the **keyboard** icon at the bottom of the screen.

5. In the “Service” field, use the keyboard to type in the name of the service you provide.

6. In the “Color” field, tap the **down arrow** to select a background color for the [Services] menu.

7. In the [Duration] field, you don’t need to make any entries. This field will fill in automatically after you enter the “Start Time”, “Gap Time”, and “End Time”.

8. In the “Start Time” field, tap the **down arrow** to select the appropriate time for the service you are adding.

9. In the “Gap Time” field, tap the **down arrow** to select the amount of time that can be used while the service is processing.

10. In the “End Time” field, tap the **down arrow** to select the appropriate time to finish this service.

11. In the “Price” field, use the keyboard to type the price of this service.

12. Tap the “Active” checkbox so the checkmark appears to make this a service you are currently providing.

13. Tap **[Save]** to save the information for this service.

14. Continue to enter additional services or Tap **[Close]** to exit this setting.



Name	Price	Active
B/O	\$0.00	Yes
Bleach	\$0.00	Yes
C/B	\$0.00	Yes
Chin	\$0.00	Yes
Color/BO	\$0.00	Yes
Color/Cut	\$0.00	Yes
Eye Brow	\$0.00	Yes
Foil	\$0.00	Yes
Formal	\$0.00	Yes
Lip	\$0.00	Yes

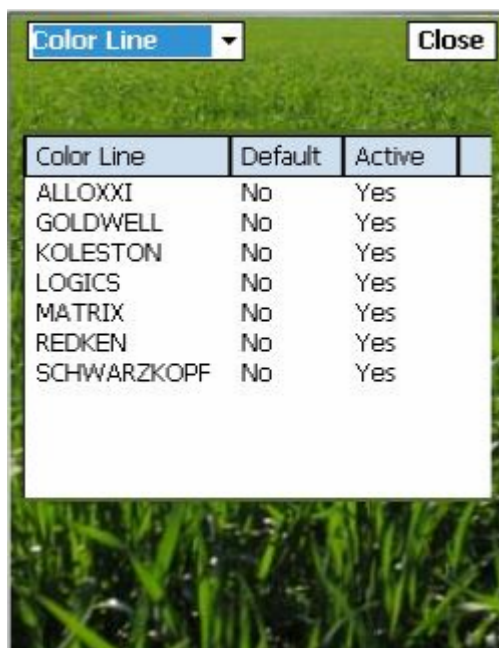
---

## *Color Line*

---

The Color Line section under **[Settings]** allows you to choose the specific color companies whose color lines you use on your clients.

1. Tap **[Schedule]**.
2. Tap **[Color Line]**.



- The available color lines are pre-loaded for you. New color lines will be available in the future. If your color line is not listed, select “Custom” as your color line and default and enter your own formulas. Tap **[Save]** and **[Close]** when you make any changes.

# Clients

The **[Clients]** application of PSA allows you to keep all details of every client in one convenient place. Your PSA stores clients' contact information, their history of appointments and services, formula records, and allows you to enter additional notes to help personalize your business with each client. Please see full User Guide for complete information.


## Chapter

# 4

### Entering New Client Information




1. Tap **[Clients]** then **[New]**.

 Tap the **keyboard** icon at the bottom of the screen.

2. Type in the contact information for the client.
3. Tap **[Save]**.

### Entering Client Formulas

1. Tap the client's name you want to access.
2. Tap **[Formula]** then **[New]** and follow the prompts from the drop down boxes.
3. In the "Application Type" field, tap the **down arrow** and select the correct application.
4. In the "Color Line" field, tap the **down arrow** to select the color line you use.

 If you selected a default color line in the **"settings"** application, it will automatically appear in this field.

5. In the "Natural Color" field, tap the **down arrow** to select the client's natural hair color.
6. In the "Target Color" field, tap the **down arrow** to select the client's target hair color.



7. In the “% Gray” field, tap the **down arrow** to select the correct percentage.

- 🌈 If you selected any application using foil, the screen on the bottom right will appear.
- 🌈 You can select between one and four colors as highlights or lowlights for a foil application. You do not have to enter four colors.
- 🌈 Select colors from the column on the left; select developers from the column on the right.

8. In the “Foil / Developer” fields, tap the **down arrow** to select the correct colors and developers.

9. Tap [**Formulate...**].

10. The formula can be changed or customized in two ways:
1. Tap [**< Change Formula**] to go back to the previous screen and change the selections for application type, natural color, target color, % gray, and foil / developer. Or...
  2. Tap [**Customize this Formula**] and use the **keyboard** to change the text in the “Results” field.

- 🌈 You must tap [**Save**] to save the formula to the client’s history.

11. Tap [**Save**] and [**Close**] when you have completed the client’s color formula.

### *Checking Client History*

- 🌈 The information under the “History” tab includes the date, application type, color line, and specific color formula used during a particular date. The “Service” tab shows the date and service provided.
- 🌈 You can add notes to a client’s history at any time.

1. Tap [Clients] then Tap on a clients’ name and Tap [History]
2. Tap any line of the history information to see the details of the formulas used for a particular date.
3. Tap the screen again to close the detail information.

- 🌈 No changes can be made to the color formula information from the history tab.

- 🌈 **This is the quick way to retrieve a client’s hair color formula.**

### *Entering Notes for a Client*

You can enter notes, comments, or reminders for a client at any time.

1. Tap the client's name or **[New...]** for a new client, then Tap **[Notes]**.
2. Tap the **keyboard** icon at the bottom of the screen.
3. Type your text in the "Note" field.
4. Tap **[Save]** and **[Close]**.

This screenshot shows the 'Notes' screen for a client named Thomas Smith. At the top right are 'Save' and 'Close' buttons. Below the client name, there is a 'Note:' label and a large text area containing the text 'Birthday is August 12, 2007'. At the bottom, there is a tab bar with 'Detail', 'Service', 'Formula', 'History', and 'Notes' (which is currently selected). A small keyboard icon is visible at the very bottom.

### *Deleting a Client*

You cannot delete a client, but you can make a client Inactive by tapping the Active box and removing the check mark. If you truly want to delete a client you may overwrite the client information with new information and save over the original data.

This screenshot shows the client information screen for Thomas Smith. At the top right are 'Save' and 'Close' buttons. The form contains the following fields: 'Name (f/l):' with 'Thomas' and 'Smith' in separate boxes; 'Primary #:' with '123-456-7689'; 'Cell #:' with an empty box; 'Address:' with '13 Any St'; 'City/St.:' with 'Rochester' and 'NY' in separate boxes; 'Zip:' with '14621'; 'Email:' with 'email@gmail.com'; and 'Active:' with a checked checkbox. A white arrow points to the 'Active' checkbox. At the bottom, there is a tab bar with 'Detail', 'Service', 'Formula', 'History', and 'Notes' (which is currently selected). A small keyboard icon is visible at the very bottom.

# Schedule

The “**schedule**” function of your *PSA* allows you to view your schedule by the day, week, and month. Please see full User Guide for complete information.

## Chapter 5



Tap **[Schedule]** to view your calendar.

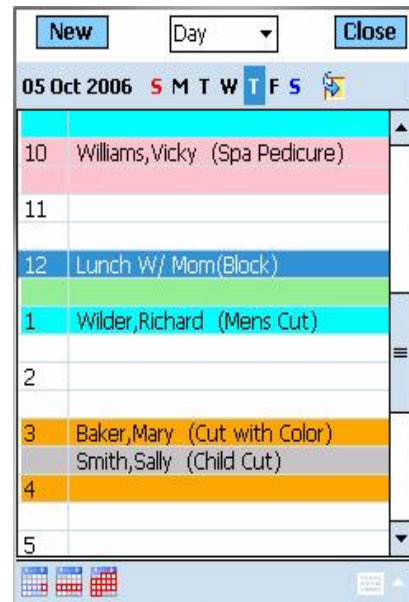
### Calendar Views

You can view your schedule in three different ways: by the day, week, or month. To select the view you want:

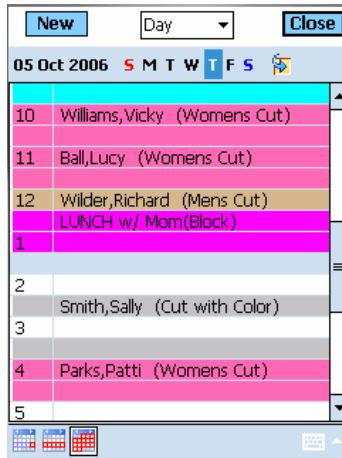
- tap on the box at the top center of the screen to pull down the options OR...
- tap on the appropriate icon at the bottom left of the screen

### Day View

- You must make schedule entries from the “Day” view of the calendar. You can also make entries from the **[Clients]** application.
- The “Day” and “Week” views show your available hours to work with a white background. The hours that you are not available to work are blocked out with a turquoise background.
- After schedule entries are saved, they will appear in the day view in the color that you selected to correspond to the specific service that has been scheduled.
- You can use the date toolbar to navigate through your schedule:
  - tap the ‘ddmmyyyy’ heading to move from month to month using the back and forward arrows. Tap on a specific date in a month to go to that day’s schedule.
  - tap the ‘SMTWTFs’ headings to move from day to day in the same week
  - tap the arrow at the end of the toolbar to return to today’s date.

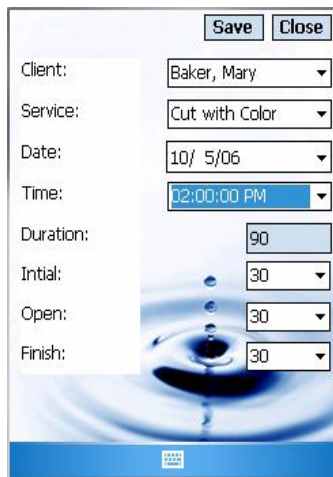


### *Scheduling a New Appointment from the [Schedule]*



1. From the “Day” view, use the date toolbar to select the day you want to schedule an appointment.
2. **Tap and hold the stylus at the time that you want to schedule.** A pop-up menu will appear.
3. Tap **[New Appointment]**.
4. Tap the **down arrows** and select the client name and service.
5. Tap **[Save]** and **[Close]**.

### *Changing an Appointment from the “Day” View*



You can change an appointment from the “Day” calendar view or from the **[Clients]** application.

1. From the “Day” view, tap and hold the appointment you want to change.
2. A pop-up menu will display your options to “Edit Appointment”, “Block Appointment”, “Move”, “Copy”, “Move/Copy To”, “Delete Appointment”, or view “Client Information”.
3. Make the necessary changes.
4. Tap **[Save]** and **[Close]** if they appear on the screen.

### *Changing an Appointment from the “clients” Application*

You can change an appointment from the “Day” calendar view or from the **“clients”** application.

1. From the **“clients”** application, tap on the client’s name.
2. Tap on the “Service” tab at the bottom of the screen.
3. Tap **[New...]** or tap the scheduled date and time.
4. Make any necessary changes.
5. Tap **[Save]** and **[Close]**.

# Register

The “**register**” application of PSA allows you to keep track of the financial side of your business. You can check clients out right from the schedule, make sales to walk-in appointments, and view past transactions. Please see full User Guide for complete information.

## Chapter

# 6

### Checking Out a Scheduled Appointment

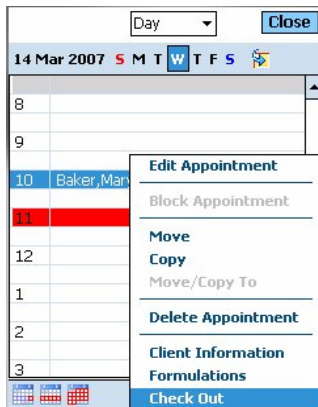
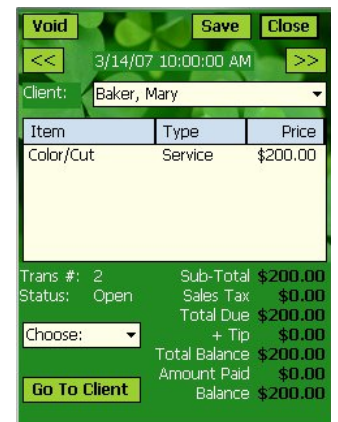


1. Tap **[Schedule]**

2. From the “Day” view, tap and hold the appointment you wish to check out and select **[Check Out]** from the dropdown menu.

The date and time and client name fields will automatically fill in from the appointment you selected.

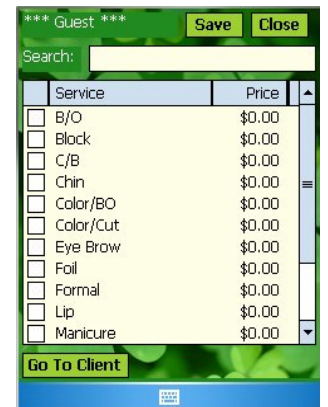
A line item will automatically be added for the type of service you selected for checkout, and the totals will be updated accordingly.



3. To change the client associated with a transaction, simply select the appropriate client from the dropdown at the top. You may also create a new client record from here if you wish.

4. To adjust a line item’s price, tap and hold the line item you want, and select “Adjust Price”.

5. Enter the desired amount to discount. If you wish to mark an item up, enter a negative number.



6. Tap **[Save]** to finish adjusting the price.

7. To remove a line item from the transaction, tap and hold the line item and select “Clear”.

8. To go to the information for the client associated with this transaction, tap **[Go To Client]**.


9. To add services or products to the transaction, tap the dropdown in the lower left which says “Choose:” and select the appropriate choice.




10. Select the services or products you wish to add to the transaction by checking the box next to the item, and tapping **[Save]**.

11. To sell a gift certificate, tap the dropdown in the lower left and select **[Add Certificate]**.

12. Fill out the appropriate information, and Tap **[Save]**.

 The Certificate Number must be unique. It may contain any combination of letters or numbers, up to 12 characters.

13. To make a payment, tap the dropdown in the lower left and select **[Make Payments]**.

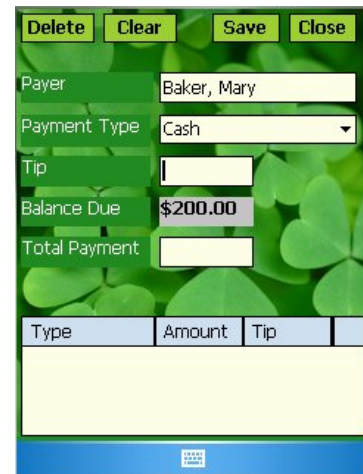
 The “Payer” field will be filled in with the name of the person associated with this transaction. The “Balance Due” field will be filled in with total amount due for this transaction.

14. Enter the appropriate information into the fields, and tap **[Save]**.

15. To view a saved payment, simply tap on that payment in the list at the bottom. To clear the screen, tap **[Clear]**. To delete a payment, first select the payment you wish to delete, and then tap **[Delete]**.

16. If you are finished making payments, tap **[Close]**. Otherwise, continue repeating steps 14-15 as many times as necessary.

17. When you are finished entering all the information, tap **[Save]** to save the transaction. The status field should now read “Complete”.

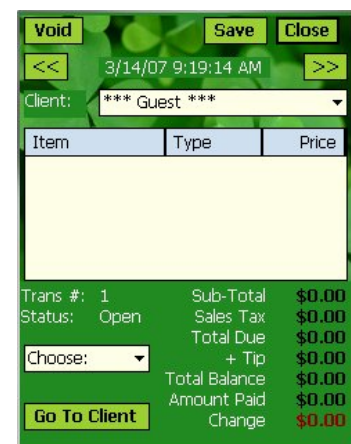
## *Checking Out a Walk-In Appointment*



1. Tap **[Register]**.

2. The register screen will appear as a blank transaction. The date & time defaults to the current date & time.

3. Follow steps 3-17 in the section “Checking Out a Scheduled Appointment”.



# Formulas

## Chapter




# 7

### *Entering a Client's Formula Information*

Please see full User Guide for complete information.

1. Tap **[Formula]**.
  - Depending on the service being chosen, the drop down menus will populate accordingly.
2. Tap the **down arrow** to select the client's name you want to access.
3. In the "Application Type" field, tap the **down arrow** and select the correct application.
4. In the "Color Line" field, tap the **down arrow** to select the color line you use.
  - If you selected a default color line in the **[Settings]** application, it will automatically appear in this field.
5. In the "Natural Color" field, tap the **down arrow** to select the client's natural hair color.
6. In the "Target Color" field, tap the **down arrow** to select the client's target hair color.
7. In the "% Gray" field, tap the **down arrow** to select the correct percentage.



-  If you selected any application using foil, the upper right screen will appear.
  -  You can select between one and four colors as highlights or lowlights for a foil application. You do not have to enter four colors.
  -  Select colors from the column on the left; select developers from the column on the right.
8. In the “Foil / Developer” fields, tap the **down arrow** to select the correct colors and developers.
  9. Tap **[Formulate...]**.
  10. The formula can be changed or customized in two ways:
    - Tap **[< Change Formula]** to go back to the previous screen and change the selections for application type, natural color, target color, % gray, and foil / developer.
    - Tap **[Customize this Formula]** and use the **keyboard** to change the text in the “Results” field.
  11. Tap **[Save]** and **[Close]** when you have completed the client’s color formula.



Client: Baker, Mary

Application Type: Retouch with Foil

Color Line: SCHWARZKOPF

Natural Color: 4

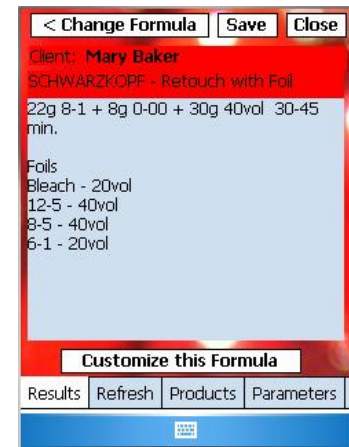
Target Color: 8-4

% Gray: More than 30%

Foil / Developer:

Bleach	20vol
12-5	40vol
8-5	40vol
6-1	20vol

**Formulate...**



**< Change Formula** **Save** **Close**

Client: Mary Baker

SCHWARZKOPF - Retouch with Foil

22g 8-1 + 8g 0-00 + 30g 40vol 30-45 min.

Foils

- Bleach - 20vol
- 12-5 - 40vol
- 8-5 - 40vol
- 6-1 - 20vol

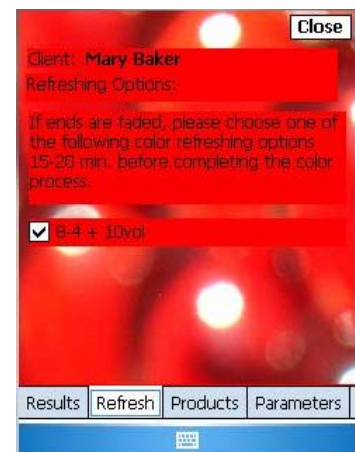
**Customize this Formula**

Results Refresh Products Parameters

### *Using the “Refresh” Tab*

After getting the correct color formula for a client on the “Results” tab, you can use the “Refresh” tab to receive additional instructions if your client’s ends are faded.

1. Tap the “Refresh” tab for additional instructions.
2. Tap the checkbox add the refresh step to the “Results” information.



Client: Mary Baker

Refreshing Options:

If ends are faded, please choose one of the following color refreshing options 15-20 min. before completing the color process.

☒ 8-4 + 10vol

Results Refresh Products Parameters

### *Using the “Parameters” Tab*

The “Parameters” tab gives a summary of the specific hair color information that you entered for your client.



# Reports

## Chapter

# 8

### *Daily Closeout*

---

The daily closeout report is to help keep track of your transaction totals. When you open this report, you will see the totals from all the completed transactions you have made since your last closeout was performed. The top section contains the total income taken in since the last closeout. The “Receipts” section contains all payments received. The “Activities” section contains all items or services purchased, along with tips received and sales tax charged. For example, Gift Certificates are in both the “Receipts” section and the “Activities” section. When a client purchases a gift certificate, the total amount of the certificate appears under “Activities.” When a certificate is redeemed, the amount redeemed appears under “Receipts.” To accept the report, Tap **[Closeout Transactions]** at the bottom of the screen.

### *Closeout History*

---

The closeout history report lists the date and time of all the daily closeouts you have performed. To view the totals for a particular closeout, Tap on the closeout you are interested in. To view totals from a date range, select the start and end dates in which you are interested in the two date fields. Then, Tap **[View Totals From Range]**. The totals of all completed transactions in that date range will be displayed.

### *Gift Certificate List*

---

The gift certificate list is a listing of all gift certificates sold. You can refine the list by displaying only redeemed certificates, unredeemed certificates, or both. You can also refine the list by expiration date by checking the “Search By Date” box and selecting the appropriate date range. The “To” date defaults to ten years from the current date.

Displayed in the list are the certificate number, the expiration date, the current value remaining, and the original value of the certificate.

Tap and hold a certificate in the list and select “View Certificate” to view more information about the certificate.

### *Transaction History*

---

Transaction history shows you a list of all transactions and their statuses. To view any individual transaction in more detail, simply Tap on the transaction in the list.

By default, the transaction list will show only transactions from the current date. If you wish to view transactions from a different date range, select the appropriate start and end dates to search in the date fields at the top.

PERSONAL SALON ASSISTANT

## Quick Start Guide

---

**Please refer to the Full User Guide which can be viewed and downloaded online at [www.salontechnologies.com](http://www.salontechnologies.com).**

Technical Disclaimer: SalonTechnologies' formulas are for reference purposes only. The end result may vary. Therefore, formulas may need to be adjusted to each individual's specific hair type. These formulas are based on average hair texture and density. SalonTechnologies software is developed for the exclusive use of licensed cosmetologists only. A patch test is required before each application. SalonTechnologies software is to be used with your hair color company's educational hair color system.

Information in this document is subject to change without notice. Reproduction in any manner without the written permission of SalonTechnologies is forbidden.

© 2006 SalonTechnologies, Inc. All rights reserved.

Published August 2007

© SalonTechnologies, Inc.  
3495 Winton Place  
Building E, Suite 300  
Rochester, NY 14623  
Phone 1.585.273.0238 • [www.SalonTechnologies.com](http://www.SalonTechnologies.com)