User Guide

S A L O N M A N A G E R   S O F T W A R E

User Guide

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.

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Getting Started

Welcome to SalonManager. Your complete business management solution that is beautifully simple. Your SalonManager software comes to you on a CD which also contains a fully indexed copy of this User Guide.

Loading Your SalonManager Software

🌀 If you currently have SalonManager loaded on your PC, please BACK UP your data before inserting the CD to upgrade your current version.

To load your SalonManager Software just place the CD in your CD Drive and follow the prompts. If the CD does not load; click [Start] in the bottom left-hand corner of your screen, then click [Run]. Click [Browse] then click the arrow next to the [Look In] drop box. Click on your CD Drive, then click [Salon Manager] and click [Open].

Registering Your SalonManager Software

SalonManager Software will run for 30 days before it shuts off unless you register it. You will need to register annually for the security of your information and ours. This is a free service.

To Register…Call Email Support@SalonTechnologies.com

1. Click on [**Settings**] for the pull-down screen.

2. Click [**Company**] and then click on [**Registration**]

3. SalonTechnologies will ask you for the 20 digit product key on your screen, they will then give you a new **20-digit registration key** to enter in the spaces provided.

4. Click [**Save**] and then [**Close**].

5. Congratulations! Your SalonManager Software is now officially registered! Please go to www.salontechnologies.com for updates and other information about your software.

Choosing a Password

1. Click on [**Settings**] for the pull-down screen.
2. Click **[Company]** and then click on **[Password].**
3. Enter a **{Password}** to be used for accessing password protected reports and information within this software.

❋   **To avoid complications, we are suggesting that all of our clients use their first two initials followed by the last four digits of their social security number.** For example; Jane Doe would be **"jd5647"** where "**jd**" are her initials and **5647** are the last four digits of her social security number.

4. Enter this **{Password}** again to confirm your password**.**
5. Click **[Save]**.
6. Enter "password" as the existing {**Password}** for first login only.
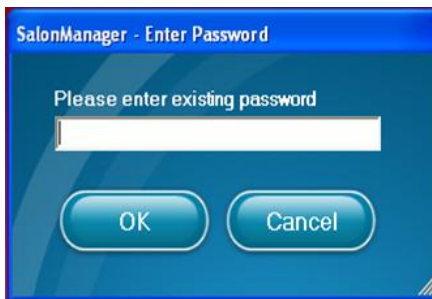
7. Click [**OK**] then [**OK**] again and then [**Close**].

❋ **Follow these steps to change your password at anytime.**

Chapter

2

This section will take some attention, but you will be setting up your business model for the future.

Settings

The [Settings] application of SalonManager allows you to customize the program according to your personal business. This is where you specify your color line, company, salon services, operators, products, reports, and scheduling preferences. All data entered will affect how your software functions as well as its performance.

There are seven tabs under the **[Settings]** drop-down from the toolbar:

1. **Backup Data**

2. **Restore Database**

3. **Color Line**

4. **Company**

5. **Salon Services**

6. **Operations**

7. **Product**

8. **Report Security**

Backing up Your Data

It is important to back your information up every day. When you backup your information, a copy of it is saved to your hard drive in a location that you specify or optionally backup to any type of external drive. Should anything happen to your software or computer, you will be able to retrieve your information from your backed up copy using the **RESTORE DATABASE** option.

To backup your data, click **[Settings]** then **[Backup Data]** and then click **[OK].** You will see a window that says your data has been successfully backed up. To RESTORE from your backup, click **[Settings]** then **[Restore Database]** and then click **[OK].**

NOTE: SalonTechnologies recommends backing up to a thumb drive or external hard drive. This ensures that if your computer breaks, you can get a new desktop and restore from your external drive after reinstalling your SalonManager software.

Color Lines

The Color Line section under **[Settings]** allows you to choose the specific companies whose color lines you use on your clients. The color lines available include **Goldwell, Alloxxi**, **Koleston, Logics, Matrix, Redken** and **Schwarzkopf.**

You can make certain color lines "Active" or "Inactive" by clicking on a color line, then clicking the "Active" box, then **[Save]**. The fewer color lines you have running, the faster the Formulating process will be.

You can also choose a default color line by clicking the color line then clicking the "Default" box. Your default color line will automatically come up when formulating a new color.

❖ **If your color line is not on the software, select [None-Custom Only] as your default.** This will bring you right to the custom formulation box for you to input your own formulas.

Company Information

To get to you Company Information screen, click **[Settings]** then **[Company].**

1. Enter your company's information.

2. Choose between Appointment Intervals of **30** minutes or **15** minutes.

3. Type in how many months you would like your computer to go back showing appointments.

4. Type in your State Tax Percentage and click on the boxes if your state collects taxes for Retail and/or for Services.

5. From here you can register your software. Please see **"Registering Your Software".**

6. You can also choose your Password. Please see **"Choosing a Password".**

Setting up Salon Services

Services refer to the beauty care services you provide your clients, while *Service Groups* are the categories to which these services belong. For example, a manicure service and a pedicure service may belong to the Nail group, while a C/B service and a Foil service and a Color service belong to the Hair group.

Placing services in groups has these advantages:

1. You can assign a whole group to an operator, versus assigning one service at a time.

2. You can monitor sales and statistics by groups instead of only services.

It is necessary to create service groups before creating services. SalonManager comes with some services and groups already installed. These can be changed or edited. To *add a service group name,* click **[Create New Group]** then type in the new group Name and click **[Save].** As names are entered each will appear in the window titled "Group".

To *add a service group name,* click on the group you would like to enter them under, and then click **[Create New Service].** Enter the new name of your service in the service box and click **[Save].** As service names are entered each will appear in the window titled "Service".

Setting up Service Settings

The *Price* is the amount you intend to charge clients for services. If you are interested in deducting a *Fee* from an operator each time a particular service is performed; you will need to type in a fee amount in the *Fee* box. If you would like to keep track of how much services are costing the business, you will have to enter the product used amount in the *Cost* box.

In your *Company* settings, you have chosen whether services are taxable or not. If you have chosen services *not* to be taxable, but would like to tax a certain service, click the *Tax* box.

You will need to click the *Active* box to make this service available.

The *Duration* of the service is the amount of time it takes to complete a service.
 If you can complete a service in a given amount of time, click on the drop down menu next to *Start Time* and select the amount of time.

If there is processing time in the middle of your service, click on the drop down menu next to *Gap Time* and select the amount of time. Then click on the drop down box next to *End Time* and enter the amount of time to finish the service.

If you wish to *Double Book* (to book a service during the gap time) check [X] the *Double Appt* box.

You can also choose what color you would like the service to show up on the schedule as well as what color the letters will be.

> ❇ **You must have all your Services setup prior to setting up your Operators or you will have to add each service manually for each Operator.**

Once your Services and Operators are setup, you can go back to your Operators and customize their individual settings. For example, if some of your Operators have different prices for their services, you can change them individually, or if your Operators take longer to perform a service, you can change the duration.

Setting up Operators Information

1. Click on **[Settings]** for the pull-down screen.
2. Click **[Operators].**
3. Begin entering the **[Operator] information** and complete the information on this screen.
4. In the second **[Name]** field, enter the name of the operator as you would like it to appear on the schedule.
5. Click on the Checkbox next to **[Active]** if you want the operator to appear in the drop down list.
6. Click on the Checkbox next to **[Time Clock]** if you wish to track the employees/operators time. This function is generally used for salaried employees.
7. Click on the Checkbox next to **[Show On Schedule list]** if you want the operator to appear on the schedule.
8. If you have entered information incorrectly and want to change what has been entered, click **[Clear]** to begin re-entering this information or just change the data that needs changing.
9. Click **[Save]** and then **[Close].**
10. Repeat steps 1-9 to continue adding multiple operators.

☘ **To deactivate or take an operator off the schedule, uncheck the *Active* box and click [Save].**

Setting up Operators Schedules

The **[Schedule]** tab allows you to set the working hours of each individual operator for each day of the week. The information entered in this screen will be reflected on the schedule.

1. Click on **[Settings]** for the pull-down screen.

2. Click **[Operators].**

3. Click on an individual Operator. Their name will become highlighted.

4. Click the **[Schedule]** tab at the bottom of the screen to set the available working hours for each individual operator.

5. Select your Start Time and End Time of each day you are working. If you are not working on a specific day, click on the blank space above 6:00 AM.

6. When you have entered the weekly schedule for the specific operator, Click **[Save]** and then **[Close].**

Selecting Operators Services

1. Click on **[Settings]** for the pull-down screen.

2. Click **[Operators].**

3. Click (Select) the checkbox next to the operator whose services you are setting-up.

4. Click the **[Services]** tab at the bottom of the screen.

5. Check the boxes next to the *Groups* of services the operator will be offering.

6. The services will come up automatically. If there are any services in the Group the operator will *Not* be offering, click on the service and then uncheck the *Active* box.

Entering Products

The **[Product]** section under settings allows you to list specific products that you want to track for sales and inventory.

Setting up Types of Products Sold

This section will allow you to track sales and inventory for all the products sold in your salon.

1. Click on **[Settings]** for the pull-down screen.
2. Click **[Product]**
3. Click **[Type]**
4. Enter the various product **[Type]** (Examples: Color, Conditioner, Shampoo, Hair Spray, Styling Gel, Nail Color, Body Lotion, Brush, Comb, etc.)
5. Click **[Save]** and then **[Close].**
6. Continue entering all of the products you wish to track for sales and inventory by repeating steps 4 and 5 listed above OR you can [**Save**] and [**Close**] and repeat steps 1-5.
7. Now that you have all of the Manufacturers, Vendors and Product Types entered, you will need to enter specific information for these products. Click (Select) the checkbox next to the first product that appears in the table. The arrow to the left of the product indicates which product you have selected.
8. Enter the product number that you or your vendor uses for these products.
9. The product that you have selected (arrow is pointing to) will automatically be populated in the product name field
10. Enter the Manufacturer of this product using the pull down menu by clicking on the name of the manufacturer.
11. Enter the Vendor who supplies you with this product using the pull down menu by clicking on the name of the vendor.
12. Enter the Product Type using the pull down menu by clicking on the appropriate type of product.
13. Enter the cost of the product. The cost entered here is the price you pay to purchase the product from the vendor/manufacturer. (Your Cost).
14. Enter the price of the product. The price is what the customer will pay for the product (Retail Price of the product).
15. In the "Min" field you will enter the minimum amount of this product you want to stock in your inventory at all times
16. In the "Max" field you will enter the maximum amount of this product that you will stock in your inventory.
17. The "**Last Date Sold**" and **"On Hand"** fields will populate automatically when using the register function of the software.

Setting up Vendors

In this section, you will be entering the different vendors that you purchase your products from including their contact information.

1. Click on **[Settings]** for the pull-down screen.
2. Click **[Product]**
3. Click **[Vendor]**
4. Enter the **[Vendor]** name and contact information (Examples: International Beauty Supply, etc.)
5. Click the **[Active]** checkbox so the checkmark appears.
6. Click **[Save]**
7. Click **[Close].**
8. Continue entering all of the vendors for each of your products you wish to track for sales and in inventory by repeating steps 4-6 listed above **OR** you can **[Save]** and **[Close] and repeat steps 1-7.**

❖ **The "Active" checkbox designates the vendor for a product and will be listed in the pull down table shown.**

❖ **WE STRONGLY RECOMMEND that you enter all of the vendors for the products you wish to track for sales and inventory purposes.**

❖ **You can make changes to any individual vendor and their stored information at any time.**

Setting up Product Manufacturers

You begin by entering all of the manufacturers for these products.

1. Click on [**Settings**] for the pull-down screen.
2. Click **[Product]**
3. Click **[Mfg]**
4. Enter the name of a manufacturer in the **"Manufacturer Name"** field. (Examples: KMS, Bedhead, Paul Mitchell, Matrix)
5. Click the **[Active]** checkbox so the checkmark appears.
6. Click **[Save]**
7. Click **[Close].**
8. Repeat steps 4-6 listed above until you have entered all of the manufacturers for each of your products you wish to track for sales and in inventory. Continue setting up the manufacturers for all products by pressing **[Save]** and repeating steps 2-4 **OR** you can **[Save]** and **[Close] and repeat steps 1-7.**

❖ **The "Active" checkbox designates the manufacturer for a product and will be listed in the pull down table shown.**

❖ **WE STRONGLY RECOMMEND that you enter all of the manufacturers for the products you wish to track for sales and inventory purposes. Manufacturers produce many different products under different names. If you in-active a manufacturer, it will remain inactive for all products you have listed.**

Setting up Security for Reports

Security is quite simple. SalonManager uses one password to protect the software. You will be able to choose which Reports your operators will be able to access and which Reports and information they cannot.

1. Select **[Settings]**
2. Select **[Report Security].**
3. Type in your Password when prompted.
4. Select **[Save].**
5. Select a Report from your Report List and then check the box on the bottom next to Password Needed
6. Select **[Save].**
7. Repeat this for each Report you would like to Password protect.

   🌸 Please see **"Choosing a Password".**

Email Configuration – Configure Email Server

Setting up your SalonManager Email System to send out **Appointment Reminders**, **Birthday Wishes** and **Custom Greetings** is very easy to do.

The first thing you have to do is tell SalonManager about your email account and enter the customized settings for how often you want your email system in Salon Manager to send your email. Before setting up your email system, you MUST already have an email account such as Yahoo, Gmail, AOL email, etc. SalonManager does NOT receive email messages. Most salons these days have a separate email address just for their salon. If not, use Yahoo, Google, AOL, etc. to set an email address for your Salon or Spa.

In order to use you email system, you first must **check mark ENABLE**. For whatever reason, you might need to turn your email system off. To turn it **OFF**, uncheck **ENABLE**.

LAST EMAIL SEND indicates the last date that SalonManager sent out an email. Simply click the **REFRESH** button to update this status.

Next, enter you **NAME** as you want it to appear in the Emails that are sent out. Most Salons enter the Salon Name in Your Name.

Enter your **FULL EMAIL ADDRESS** i.e JoeSmith@gmail.com in **YOUR EMAIL ADDRESS**.

SalonManager needs to know who provides your email services so it can determine what information is necessary to complete your setup. Pick from the drop down menu: **GMAIL, HOTMAIL, AOL, MICROSOFT EXCHANGE or OTHER.**

Depending upon your selection, other parameters might be need and will display on your screen:
- **SSL** – Does your provider utilize SSL (higher level of security involving SSL Certificates – Contact your Email Provider for this information).
- **HOSTNAME** – In some cases, SalonManager will need to know the HOST NAME of your Email Server. Please contact your email provider for this information.

To verify you email is working, enter your **USER NAME & EMAIL PASSWORD** in the spaces provided. Also, enter a **valid email address to SEND A TEST MESSAGE** to.

When you have made all the necessary changes, click on **SAVE CONFIGURATION button.** At this point, SalonManager will attempt to send out a **TEST EMAIL** to the email account you provided. If you have successfully setup your email system correctly, SalonManager will display a message on your screen indicating that your email was **SUCCESSFULLY SENT**. At this point, check the mailbox of the email account that you sent the TEST MESSAGE to.

NOTE: SalonTechnologies CANNOT help you with your email setup . Please contact your EMAIL PROVIDER for instructions on entering your email settings.

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Email Configuration – Email Message Configurations

After you have your SalonManager Email System setup, you are ready to setup the messages sent for **Appointment Reminders** and **Birthday Wishes**. SalonManager makes it easy for you to customize these greetings especially for your Salon or Spa. When you see the symbols **<< >>,** SalonManager will replace these parameters with the information from your Calendar or Client Record. Under **NOTE**, you may choose to pick other parameters that you want to substitute into your emails. You may use some or none of these parameters. Also, if you have multiple operators, SalonManager will replace <<Operator Name>> with the name of the stylist performing the service. Your Appointment Reminders will send out on the schedule you select. Birthday Emails will go out on your Clients Birthday as defined in Clients.

Optionally, you may add any kind of attachment to your email. You can attach a picture, a coupon, a card, etc.

Unlike other salon management systems, SalonManager also provides you with the ability to send a **CUSTOM EMAIL**. Custom Emails are ideal for marketing your salon and your salon services. Simply enter a **SUBJECT**, a message in the **BODY**, and optionally add an attachment.

Unlike an Appointment Email and a Birthday Email, this **CUSTOM EMAIL will be sent to ALL YOUR CLIENTS!**

Watch you business grow as you utilize the SalonManager Email System!!

Clients

The [Clients] application allows you to keep all details of every client in one convenient place. Your SalonManager Software 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.

Entering New Clients

1. Click **[Clients]**.
2. Click **[New…]**.
3. Type in the contact information for the client.
4. Click **[Save]**.

Checking Client Service Information

Your client's service information is automatically compiled from details in the **[Schedule]** application after a service is performed. You do not need to enter this information yourself.
 "Formulas" tab.

1. Click the client's name.
2. Click the "Service" tab to see the record of previous appointments and services.

Checking Client History

Your client's history information is automatically compiled from details in the **[Schedule]** application after a service is performed. You do not need to enter this information yourself.

- Since the client's history information is based on the **[Schedule]** application, you must delete cancellations and no-shows from your schedule or those dates will appear in the history even though no service was provided.
- The information under "Formula" 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. The "Billing" tab shows the billing history.
- You can add notes to a client's history at any time.

1. Click on the client's name.
2. Click the tab you would like to see the history of. Each tab has its own history.
   For example, the "Formula" tab will show you the history of formulas you have used. If you used different color lines then all of the formulas will be there for each color line.

Entering Client Formula Information

Formulas can be entered while you are in the client menu. Depending on which service is chosen, appropriate fields will appear.

1. Click **[Formulas]** tab
2. Click [**New**]
3. In the **[Application Type]** field, Click the **down arrow** and select the correct application.
4. In the **[Color Line]** field, click the **down arrow** to select the color line you use.
5. In the **[Natural Color]** field, click the **down arrow** to select the client's natural hair color.
6. In the [**Target Color**] field, click the **down arrow** to select the client's target hair color.
7. In the **[% Gray]** field, click the **down arrow** to select the correct percentage.
8. In the [**Foil / Developer**] fields, click the **down arrow** to select the correct colors and developers.
9. Click **[Formulate]**.
10. The formula can be changed or customized in two ways:
11. Click **[Change Formula]** to go back to the previous screen and change the selections for application type, natural color, target color, % gray, and foil / developer.
12. Click **[Customize this Formula]** and enter/update the text in the "Results" field.
13. Click **[Save]** and **[Close]** when you have completed the client's color formula.

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

Entering Notes for a Client

You can enter notes, comments, or reminders for a client at any time.
1. Click the client's name or **[New…]** for a new client.
2. Click "Notes".
3. Type your text in the [Note] field.
4. Click **[Save]** and **[Close].**

Revising Client Information

1. To revise any client information, click the client's name.
2. Revise any necessary fields.
3. Click **[Save]** and **[Close].**

Searching for a Client

You can search for a specific client in your client list by searching on the few first letters of his or her name.
1. Type the first few letters in the client's name.
2. Your software will list any clients with those letters in their name.
3. Click on the name of the client you want.

Formulas

The "formulas" setting provides you with the most powerful, convenient, and unique application of the SalonManager program! From the specific information you enter for any client, you are given the correct formulas for perfect hair coloring. No guessing, no mistakes, no redoing colors.

Entering Client Formula Information

1. Click **[Formulas]**
2. Click the **down arrow** to select the client's name that you want to access.
3. In the **[Application Type]** field, Click the **down arrow** and select the correct application.
4. In the **[Color Line]** field, click the **down arrow** to select the color line you use.
5. In the **[Natural Color]** field, click the **down arrow** to select the client's natural hair color.
6. In the [**Target Color**] field, click the **down arrow** to select the client's target hair color.
7. In the **[% Gray]** field, click the **down arrow** to select the correct percentage.
8. In the [**Foil / Developer**] fields, click the **down arrow** to select the correct colors and developers.
9. Click **[Formulate]**.
10. The formula can be changed or customized in two ways:
11. Click **[Change Formula]** to go back to the previous screen and change the selections for application type, natural color, target color, % gray, and foil / developer.
12. Click **[Customize this Formula]** and enter/update the text in the "Results" field.
13. Click **[Save]** and **[Close]** when you have completed the client's color formula.

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

Refreshing Options

After getting the correct color formula for a client on the [**Results**] tab, you can use the "Refreshing Options" tab to receive additional instructions if your client's ends are faded.

1. Click the **[Refreshing Options]** tab for additional instructions.
2. Click the checkbox and the refresh step is added to the "Results" information.

Suggested Products for Clients

1. Click the "Products" tab to view the available products that you would like to sell to your client.
2. When the client has selected a product, click the product name and **[Add]**.
3. To change or remove a product, click the product name and **[Remove]**.

Color Formula Parameters

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

All changes *must* be made from this screen.

Schedule

The "schedule" function allows you to view your schedule by the day, week, and month. Setting up appointments is easy and foolproof – no more overbooking or conflicting times. You can easily check your schedule whenever and wherever you are, making it easier to manage and plan your time.

Calendar Views

You can view your schedule in three different ways: by the day, week, or month. To select the view you want:
1. Click on [**Settings**] in the menu bar to pull down the day view option or,
2. Click on the [**Schedule**] icon under the menu bar.
3. Click the date toolbar back and forward arrows to navigate through your schedule: Month to Month, Week to Week, or Day to Day.

Day View

- You can make schedule entries from any 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" or "Week" view in the color that you selected to correspond to the specific service that has been scheduled.

Week View

- The "Week" view is a forecast of your weekly schedule.
- In the red menu bar of the calendar choose the operator whose schedule you would like shown.
- 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.

Month View

- The "Month" view shows the results of your daily schedules for the entire month.
- In the "Month" view:
- Appointments are shown per operator – see the red menu bar with a triangle by the name - Choose the operator whose calendar you would like shown.
- You can use the date toolbar to navigate through your schedule: -Click the back and forward arrows to move from month to month.
- The "Month" view makes it easy to schedule a client who needs to make an appointment a month or more away. Click the '31' heading to go to the desired month, Click the desired day and schedule the appointment as instructed in "Scheduling a New Appointment from the 'schedule' Application".

Scheduling a New Appointment from the "Schedule" Application

🌸 Services with a gap time will appear on the calendar showing the open time available for another service. The open time will appear as a white space between the colors associated with the selected service. See the example of "Smith, Sally (Cut with Color)" on the screen below. The gap time at 3 PM is available to schedule another 30 minute service.

🌸 **You must be careful when scheduling a service with a gap time. An existing saved appointment will be deleted if you schedule another service with the gap time at the incorrect "open" time.**

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

🌸 The date and time fields will automatically fill in from the day view you selected.
🌸 The "Duration", "Initial", "Open", and "Finish" fields will automatically fill in from the **"Services"** information you entered into your software from the information you entered in settings/salon services.

Scheduling a New Appointment from the "Client" Application

You can change an appointment from the "Day" calendar view or from the **"Clients"** application.
1. Click **[Clients]**.
2. Click the client's name that you want to schedule.
3. Click the **[Service]** tab at the bottom of the screen.
4. Click **[New]**.
5. Click the **down arrow** for "Service" and select the service you want to schedule
6. Click the **down arrow** for "Date" to make the calendar appear.
7. Click the date that you want for the appointment. The date will automatically enter in the field.
8. Click the **down arrow** for "Time" and select the time you want for the appointment. The time will automatically enter the field.
9. Click **[Save]**. The appointment appears on the "Service" tab and on your calendars.
10. Click **[Close]**.

🌸 Scheduling an appointment from the **"clients"** application does not allow you to view any of the existing appointments on your calendar. If you schedule a conflicting time or a time outside of your available hours, a message will appear to alert you to the conflict.
🌸 The "Duration", "Initial", "Open", and "Finish" fields will automatically fill in from the **"Services"** information you entered into your software during initial set-up (information entered under settings/salon services).

Changing an Appointment from the "Day" View

1. From the "Day" view, click the appointment you want to change.
2. Make the necessary changes.
3. Click **[Save]** and **[Close]**.

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, Click on the client's name.
2. Click on the "Service" tab at the bottom of the screen.
3. Click **[New…]** or Click the scheduled date and time.
4. Make the changes to any fields that are needed.
5. Click **[Save]** and **[Close]**.

Register

Chapter

6

The "Register" application of SalonManager Software will allow 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 previous transactions.

SALES

Most of your sales will occur when you check your client out.

🌸 From the Schedule screen, right click on your clients name and click on **[Checkout]**.

This will bring you to Register.

Getting to the Sales Option Menu

🌸 From the main menu, click **[Sales]**

From this menu you can enter a sales transaction in the **[Register],** closeout your day, view gift certificate list, track operator product usage.

Entering a Sale

🌸 From the main menu, click **[Sales]** then **[Register]**

The current date and time will always be displayed. Click **[Prev]** to view a previously saved transaction. Each transaction is given a number located at the top right of the screen.

The subtotal field is an accumulation of service and retail prices.

The Tax field shows the sales tax for both retail and service sales. You can program these taxes under **[Settings] [Company].**

The Total Due shows the sub-total plus tax.

The Tip field shows the amount the client left as a gratuity for one or more operators.

The Total Balance shows the Total Due plus the Tip.

The Amount Paid shows the amount the client paid.

The Balance Due shows the change due after payment is made.

Register Functions

There Are Fifteen Buttons On The Register Screen. Here Is a Brief Description

1. **CLIENT**: selects a client.
2. **PAYMENT**: allows you to enter the amount and type of payment.
3. **PRODUCTS**: allows you to select and add products to the sale.
4. **GIFT CERT**: allows you to search the gift certificate list.
5. **SERVICE**: allows you to select a service.
6. **TIP**: allows you to distribute a clients' gratuity to two or more operators.
7. **CLEAR**: removes item in the Service and Retail window.
8. **VOID**: removes the entire transaction.
9. **NEW**: opens a new transaction screen.
10. **PRINT**: will print out a transaction receipt for your client.
11. **ACCEPT**: saves the current transaction.
12. **CLOSE**: will close the register screen.
13. **PREV**: goes to the transaction before the current transaction.
14. **TRANS LIST**: will show a list of all the transactions.
15. **NEXT**: goes to the transaction after the current transaction.

Selecting a Client from the Register

❖ From the main menu, click **[Sales], [Register]** then click the **[Client]** button for a new client or click the arrow next to the client box on the upper right to open the drop down box with the client list. Click on the clients name or select **"guest"**.

Accepting Payments

From the **[Register]** select **[Payment]**

This is where you select type of payment. There are seven different types of payments to choose from: **American Express, Cash, Check, Coupon, Discover, Gift Certificate, Visa, and Mastercard.**

Currently, our software does not interface directly with your credit card authorization equipment. This must still operate independently from the computer.

If you select **[Gift Certificate]**, the field **[Certificate #]** appears. If you do not know the Certificate Number, click [**Search**]. If you only use a portion of the total value of the Gift Certificate, you will be prompted to print a new Certificate with the remaining value after accepting the transaction.

Coupons are used as partial payments; enter the coupon value as a payment amount.

If you select **[Check]**, the field **[Check #]** appears.

In this example, the sales total was $120.00. The amount entered for payment is $120.00 and the check number is 2345 (check number is optional).
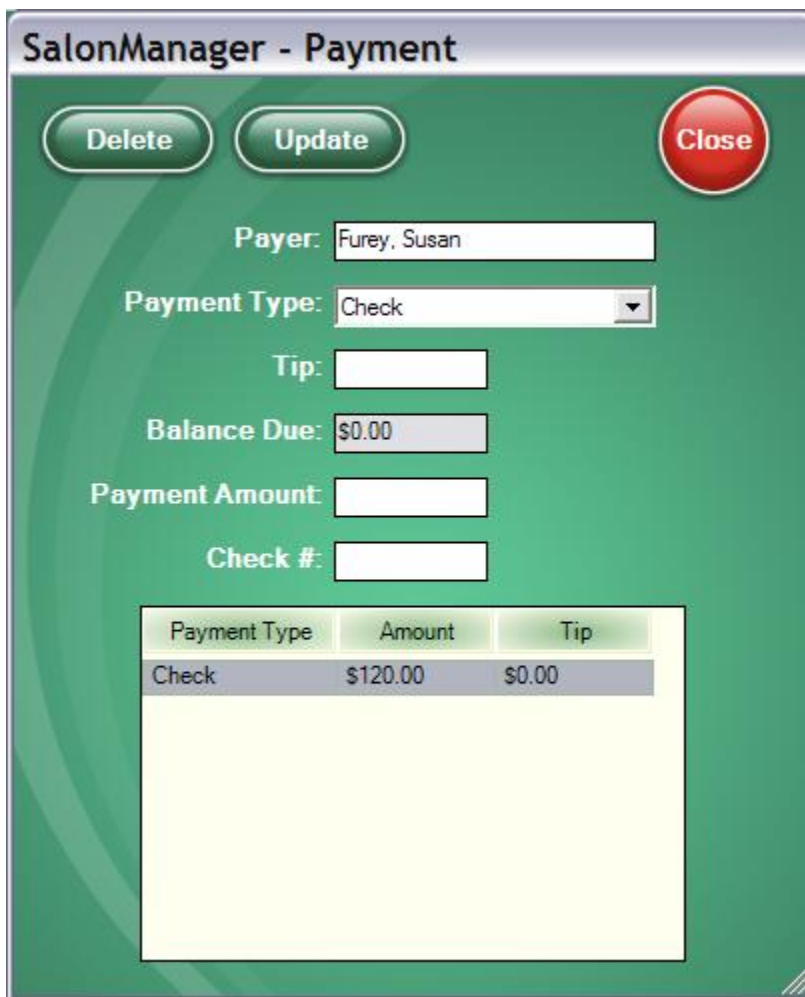
Split Payments

Split payments may occur when using Gift Certificates or coupons. Here are the steps to enter multiple payment types.

1. Enter in the desired **[Payment Amount]**
2. Click **[Update]**
3. Select another **[Payment Type]**
4. Enter the remaining **[Payment Amount]**
5. Click **[Update]** once more
    * Steps 3-5 may be repeated as necessary.
6. Your information will appear in the main box showing you: Payment Type, Amount and Tip. Click **[Close].**

From this screen, you can:

1. Add more **Services** from the same or different operators, click **[Service]**.
   🌸 For more than one operator see "**Multiple Operators**"
2. Purchase **Gift Certificates,** click **[Gift Cert].**
3. Purchase **Products**, click **[Products].**
4. Split **Tips** between operators, click **[Tip].**
5. Delete a transaction line, click on a line you would like to delete and then click **[Clear].**
6. **Void** out the entire transaction, click **[Void].**
7. Start a new transaction, click **[New].**
8. **Print a Receipt**, click **[Print].**
9. View all your transactions, click **[Trans List].**
10. Scroll through your transaction, click **[<<Prev]** or **[Next>>].**

🌸 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.
🌸 The Certificate Number must be unique.
🌸 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.

Checking Out a Walk-In Appointment

1. Click **[Register]**.
2. The register screen will appear as a blank transaction.
3. Click **[Client]**; enter new client information and then click **[Save]**.
4. Continue to follow regular sales transaction procedures. See **"Entering a Sale".**

Reports

The SalonManager software offers several different reporting options.

In this screen you can choose which reports you would like to have password protected.

1. Simply check the box next to the report that you will like to secure with a password.
2. For those reports that you select to be password protected, you will need to enter the password you create, before you are able to view or print this report.
3. If you do not wish to password protect a specific report, simply leave the box next to the report unchecked.

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, click **[Closeout Transactions]** at the bottom of the screen.

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Closeout History

The closeout history report lists the date and time of all the daily closeouts you have performed.

1. To view the totals for a particular closeout Click [**Reports**] [**Closeout History**]. Click on the closeout you are interested in.
2. To view totals from a date range, Click [**Reports**] and then [**Sales By Transaction**] and then select the start and end dates in which you are interested in the two date fields.
3. Click **[View Totals From Range]**. The totals of all completed transactions in the specified date range will be displayed.

Gift Certificate List

The gift certificate list gives you a listing of all gift certificates you have 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.

Click and hold a certificate in the list and select "View Certificate" to view more information about the certificate.

Transaction History

See "Closeout History".

Using Multiple Services with Multiple Operators

This section is for the "House" to have clients utilize services from more than one operator on commission only.

When creating an appointment for a customer that uses multiple services there is a specific way in which this must be done.

- 🌼 Operators must be commissioned based.
- 🌼 Choose which appointment your client will be checking out from.

When making an appointment that will encompass multiple services provided by multiple operators, you must follow these steps:

1. Place the appointment under the operator for each service.

   - 🌼 Example: nails by Sarah, hair by Joe

2. Double Click on one of these services.
3. Click on [**Check out**].
4. Click [**Service**].
5. Choose the operator of the other service.
6. Choose the service performed.
7. Click **[Apply]**.
8. Click **[Payment]**.
9. Add the total tip received.
10. Add the payment amount.
11. Click **[Update]**.
12. Close the payment window.
13. Click **[Tip]** to allocate tips to appropriate operators.
14. Close Tip window.
15. Click **[Accept]** when finished.
16. Return to appointment that was NOT checked out from and right click to choose "mark as checked out".

    - 🌼 This will close and record the appointment for reports and the billing information will also be in the reports under the appropriate operator.

SalonManager Premier

SalonManager Premier is a total salon, spa, and nail care business management solution that combines a full front desk management system with multiple PSA hand-held computers. **The PSA hand-held(s) must be purchased separately.**

Complete System Set-up

1.   Please place your **SalonManager CD** in your computers CD Drive. The CD will take you through Part I and then through Part II. It will let you know when it is complete.
2.   Place your **Premier CD** in your computers CD Drive and follow the instructions.
3.   Make sure your cradle or cord to your hand-held is connected to your computer.
4.   Place your hand-held device ion the cradle.
5.   You are now ready to begin loading your information into your SalonManager software. (Please see the earlier chapters). <u>Enter your information in the order as instructed</u>. You are now ready to begin using your Premier system.
6.   Note: Your **[Appointment Intervals]** must be the same on the PSA as well as the SalonManager in order for them to sync properly. Your Appointment Interval choices for scheduling are either "15 minutes" or "30 minutes". This can be found under **[Company]** in your **[Settings]** on your SalonManager software and under **[General]** and **[Settings]** on your PSA.

Syncing Instructions

1.   In order to sync, connect your hand-held to the computer using your cradle or connection cord (USB).
2.   Click the black Premier Button on the bottom right of the screen.
3.   Select Staff Member. (Choose operator whose PSA will be synched)

   ❂ DO NOT CHECK REFRESH unless you want the PSA data deleted and replaced with the data on SalonManager, this is used when you need to refresh the data in your PSA with the actions of the day. Refresh your handheld only after you have "synched" it first.

4.   Click **[Start]**. This will sync the information from your SalonManager with your PSA. You should sync your PSA to your SalonManager every morning.

   ❂ Please remember to call SalonTechnologies, Inc to register your software. Your SalonManager software automatically shut off in 30 days unless you complete the registration. Registering your software takes under 5 minutes.

   If you have any questions, please email support at Support@salontechnologies.com.