Salon Manager

for the Apple iPad

SALONTECHNOLOGIES, INC

Version 1

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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CHAPTER 1 - GETTING STARTED

Welcome to Salon Manager for the iPad! Salon Manager for the iPad is the best solution to manager your business using the amazing iPad technology. SalonTechnologies would like to thank you for purchasing their app. Many years of experience and knowledge have been put into this application. The CEO of SalonTechnologies has a patent for his Hair Color Formulating Software which is also part of this App. Visit us at: www.salontechnologies.com and register yourself as a Salon Manager Customer!

For The Quick Starter

The best way to learn to use SALON MANAGER is follow these simple rules in order:

1. Review Backing Up & Restoring prior to entering any data. Also, be sure that you have downloaded the latest version of this software for best performance.
2. Go to Main Menu → Settings and complete ALL these options. Remember, you only do this ONE time!
3. Go to Main Menu → Services and enter ALL your Salon Services
4. Go to Main Menu → Operators and enter minimally their names. If you have the information it is also a good time to enter their Services and Operator Pricing.
5. Go to Main Menu → Add your Products; at least by Product Name and Cost
6. At this time, you are ready for business minimally. You can schedule appointments and add Clients as your add the appointments. It is recommended to enter one week at a time of each Operator's scheduled appointments. As you enter appointments, your Client Base will build automatically. For the most benefits from this App are received when you setup this App to handle your Inventory, Finances, Scheduling and Reporting Needs. Enjoy!

Backing Up & Restoring

Because Salon Manager is an Apple Device, we at SalonTechnologies highly recommend that you consult with an Apple professional about backing up your app and all the information you enter into the app.

For Apple Support options, please go to: http://www.apple.com/support/ipad/

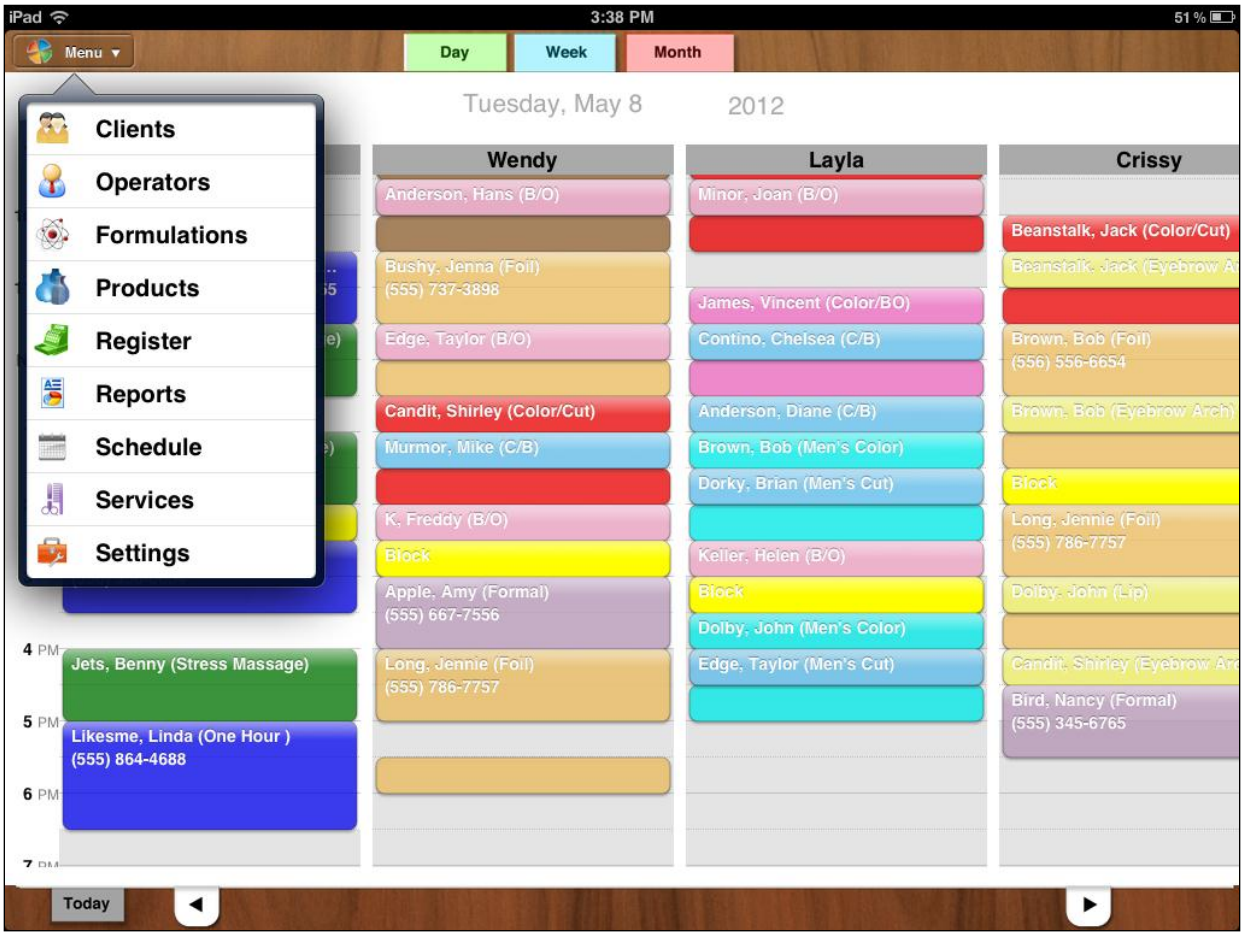
Starting Salon Manager

After purchasing **SALON MANAGER** from the iTunes App Store, the icon below will appear on your iPad. Touch this icon to begin using Salon Manager

To open SALON MANAGER on your iPad locate and select the icon shown above.

Salon Manager Main Menu

Touch the icon to access the main menu in salon manager at anytime as shown below:



Support

From the **Salon Manager Main Menu**, select **Settings Menu**; then, select **About & Support** from the Settings options displayed.

How to Contact Support

The Contact Support button is used to notify us with any problems with your SALON MANAGER app. Notification is directly to our excellent Support Department. This menu also displays the version of the SALON MANAGER application that you are using. This information is **CRITICAL** to provide to SalonTechnologies when contacting our Support Depart- ment. Also, please indicate the Version Number of your app as displayed on the Salon Manager Support Screen.

Registering As A Salon Manager Customer

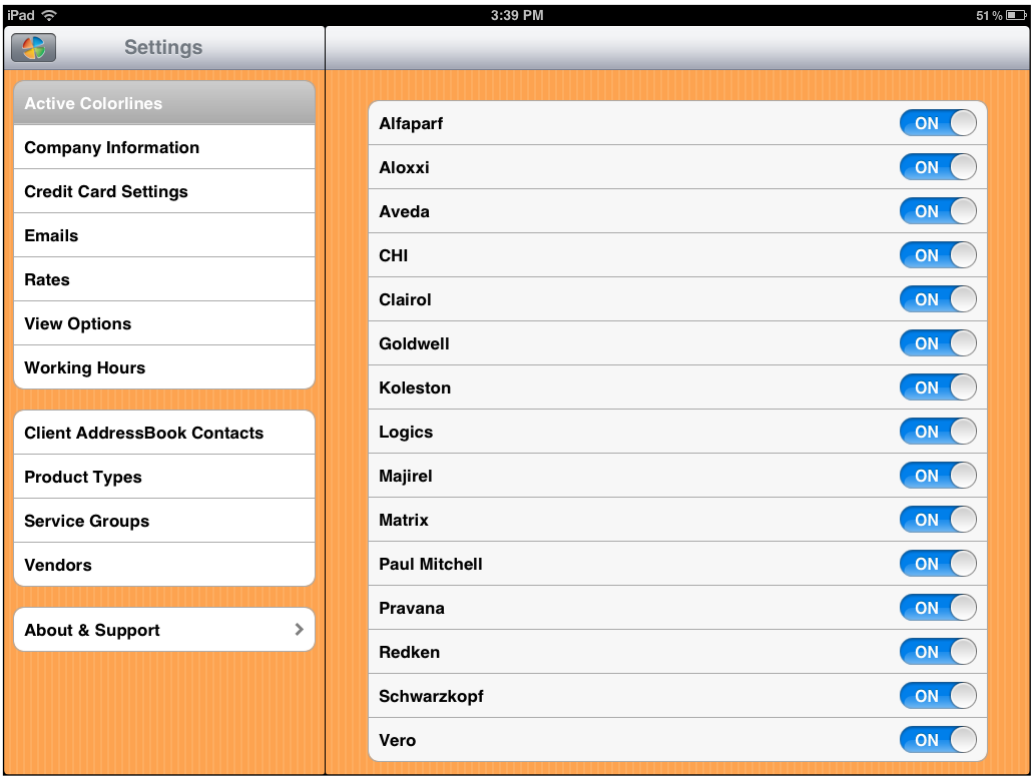
Also displayed on this screen is a button to transfer to the SalonTechnologies Website. In order to serve you better when you contact us, please take the time to register yourself as a Salon Manager customer. By registering as a SALON MANAGER customer, you will have the ability to receive special offers from SalonTechnologies, Inc.

CHAPTER 2 - SETTINGS

The SETTINGS module of SALON MANAGER allows you to customize the app according to your personal business. The following modules are part of the Settings Menu access from the Main Menu

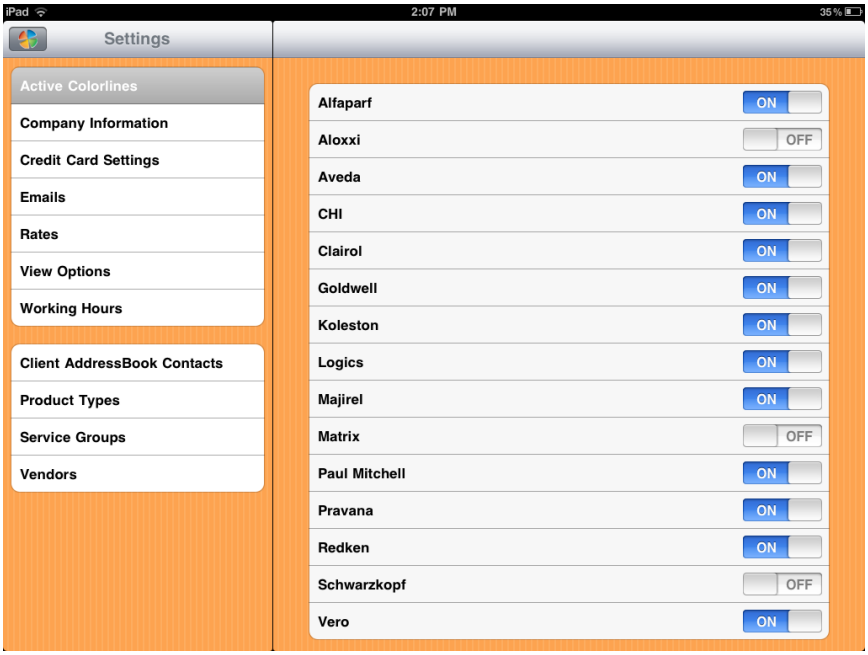
- Active Colorlines
- Your Business Information
- Credit Card Settings *(optional)*
- Emails sent by Salon Manager
- Commission Rates and Sales Tax Rates
- Viewing Options
- Operator Working hours & Working days
- Customer Address Book Contacts retrieval tool
- Product Types
- Service Groups
- Vendors
- About & Support

.



Color Lines

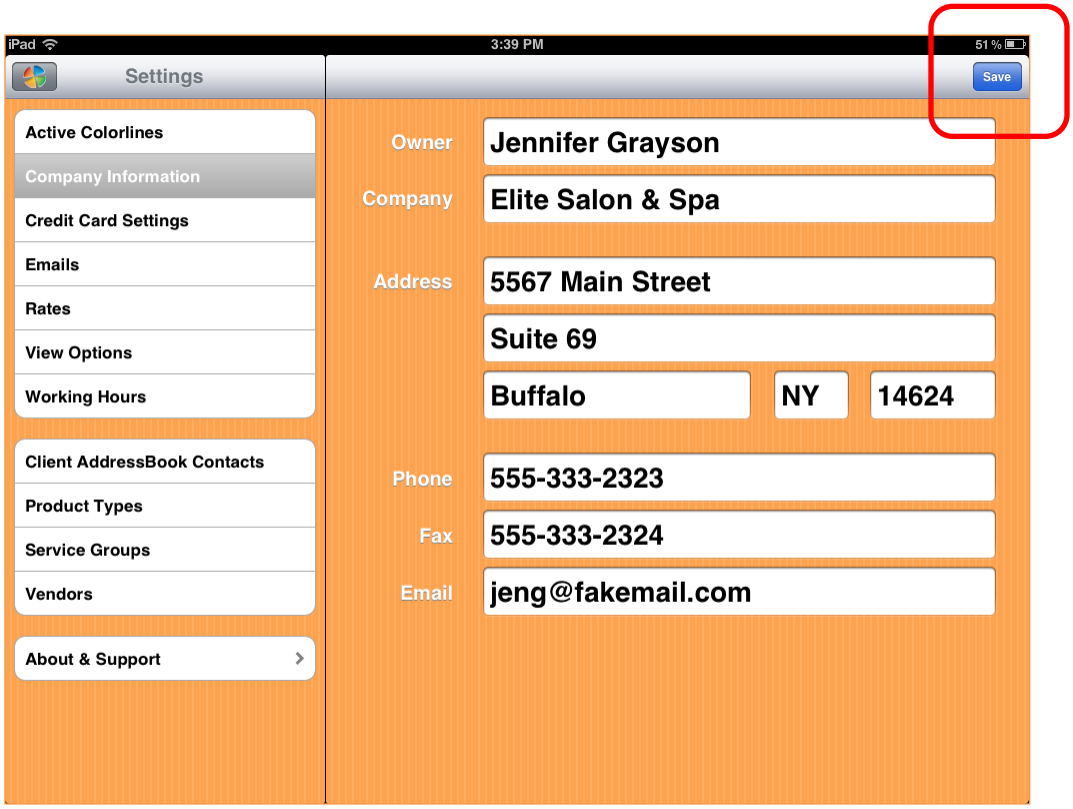
The **Color Lines** screen will display after selecting **Active Colorlines** from the **Settings** Screen. The Colorlines section allows you to choose the specific companies whose color lines you use on your clients.



You may select one or more Colorlines as needed by touching OFF. When Color Line is selected, it will appear with the ON switch.

Company Information

The Company Info Screen will display after selecting Company Information from the Settings screen. Always touch **SAVE** after making any changes on this screen. This information will be used to create your Receipts and Report Headings.

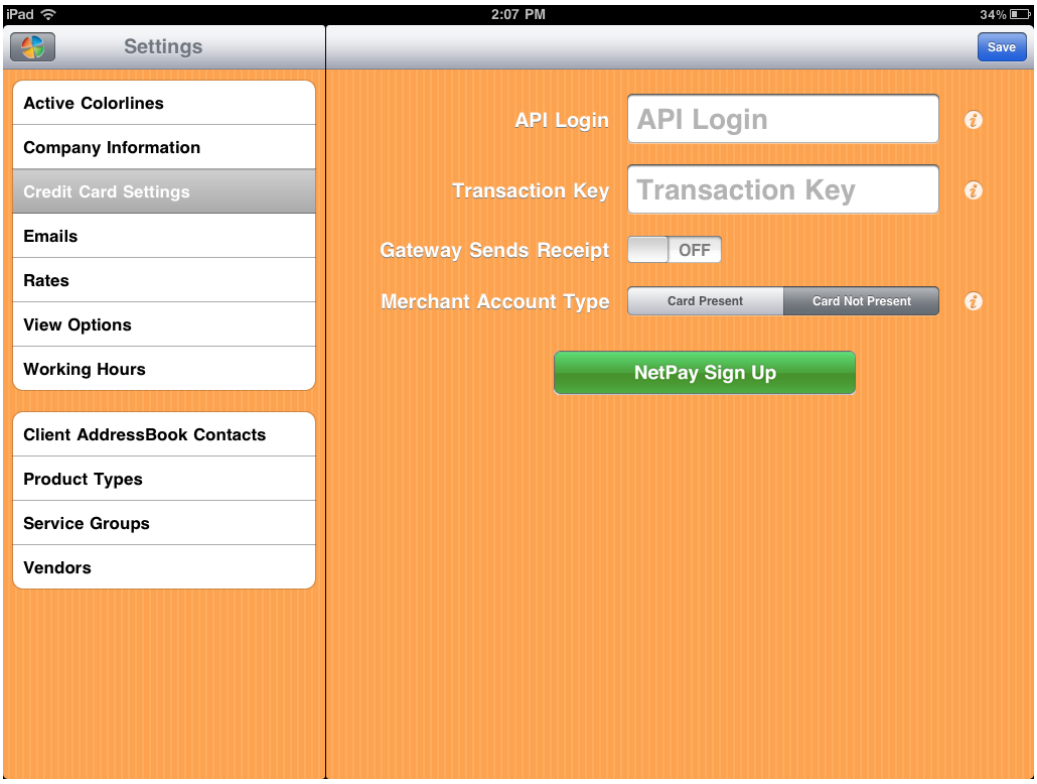


SALON INFORMATION	
Owner	Owner of Salon
Company Name	Name of Your Salon
Address 1 & 2	Street Address of Salon
City	Your City
State	Your State Abbreviation
Phone	Your Phone Number
Fax	Your Fax Number
Email	Your Salon's Email Address **used for sending Reports to**.

Credit Card Settings *(Optional)*

The settings screen for Credit Card Processing will display after selecting **Credit Card Settings** from the **Settings** main screen. This option is used to enter the necessary information for your credit card payment gateway. Before using this option, please read **Chapter 10** about processing Credit Cards. **You must apply online with NetPay or Authorize.Net to access the Credit Card Gateway.**

NetPay is the preferred Vendor because there are NO SETUP FEES.



CREDITS CARD PROCESSING GATEWAY INFORMATION	
API Login	Provided by **NetPay** or **Authorize.Net**
Transaction Key	Provided by **NetPay** or **Authorize.Net**
Gateway Sends Receipt	Optionally, you may have NetPay or Authorize.Net send receipts to your customer via their email address. Turn either ON or OFF by touching the Gateway Sends Receipts button. Note: The receipt will only show the charged amount, and not the products or services purchased.

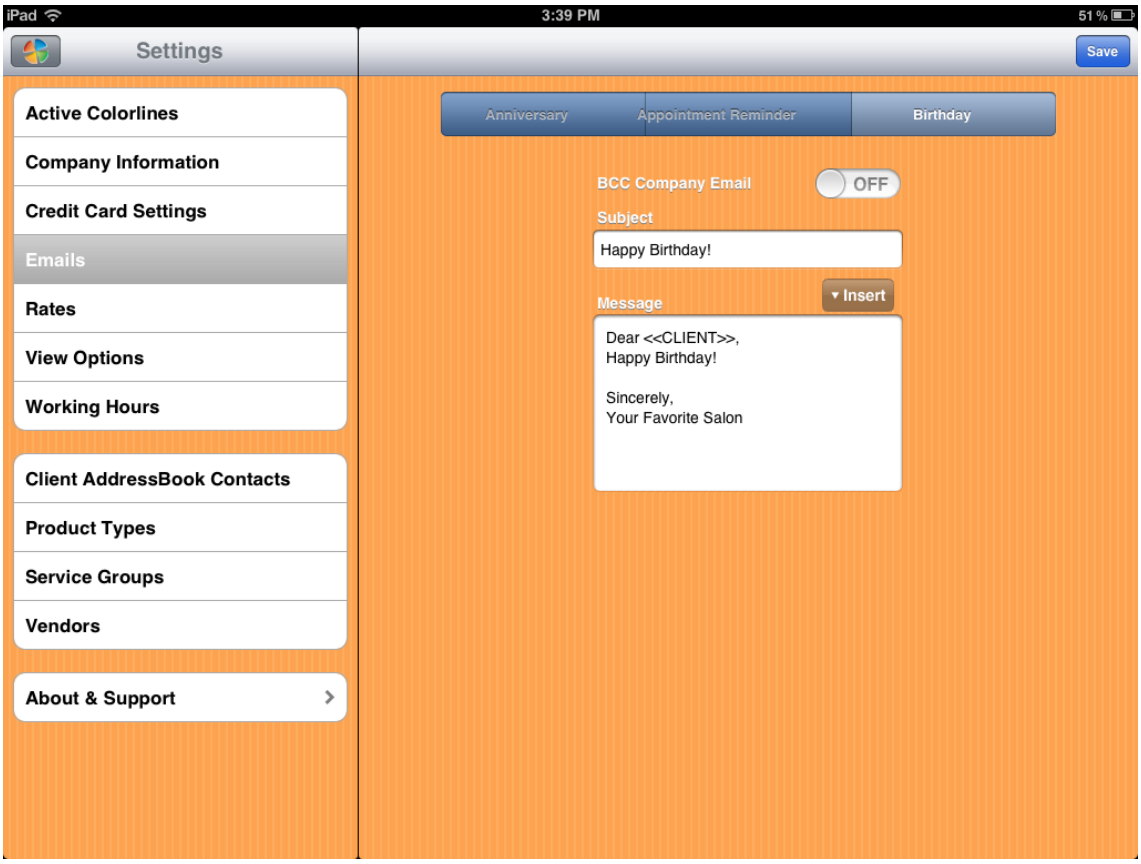
Emails: Emailing Reminders

The Email option in Settings in used to setup or change the standard emails that are sent to your Clients for Anniversaries, Appointment Reminders and Birthdays.

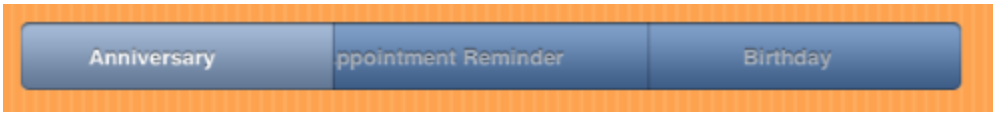
The CLIENTS module is used to send the email messages, but SETTINGS is used to do the initial setup of each email message.

SALON MANAGER maintains these three standard email formats. The Email Screen allows you to choose which email standard message you would like to edit or change. On all email standard formats, you may use the following fields to customize your own message if you would like:

- **<<CLIENT>>**
- **<<SERVICE>>**
- **<<APPT-DATE>>**
- **<<APPT-TIME>>**
- **<<ANNIVERSARY>>**
- **<<BIRTHDATE>>**



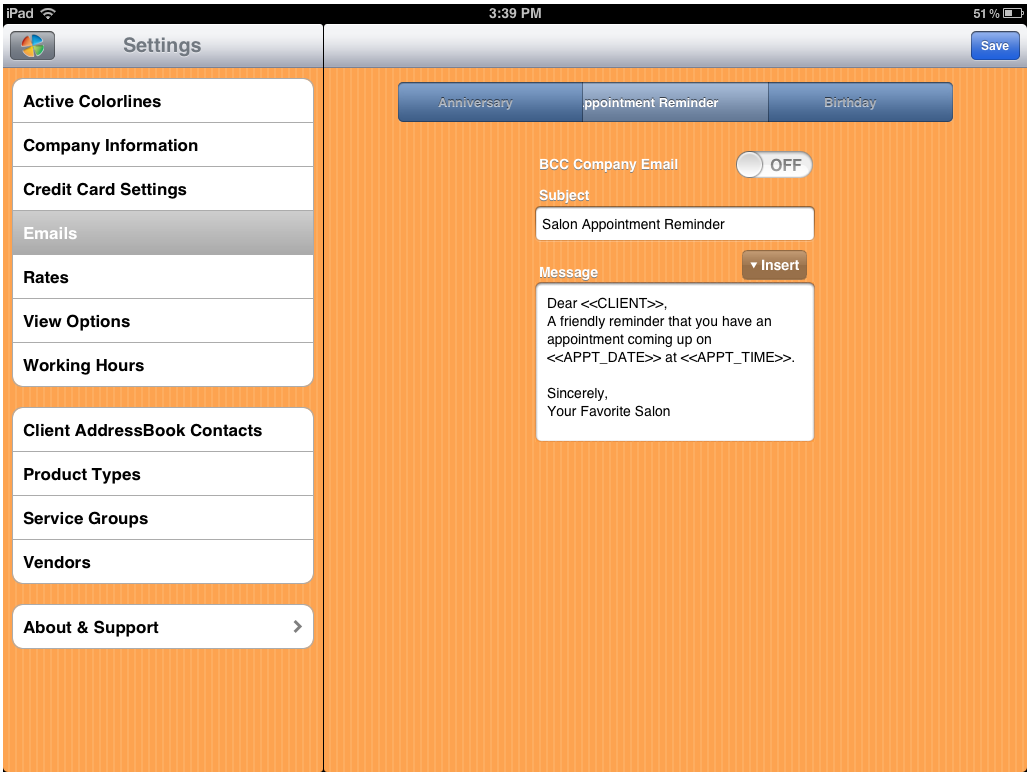
Use the bar displayed below to toggel between anniversary, appointment & birthday reminders:



How To Email Anniversary Reminders

The Anniversary Standard Email can be accessed by selecting the Anniversary Button. The space <<CLIENT>> is used as a placement holder for your data. When you send out Anniversary emails, the Clients name is automatically inserted into the email where noted.

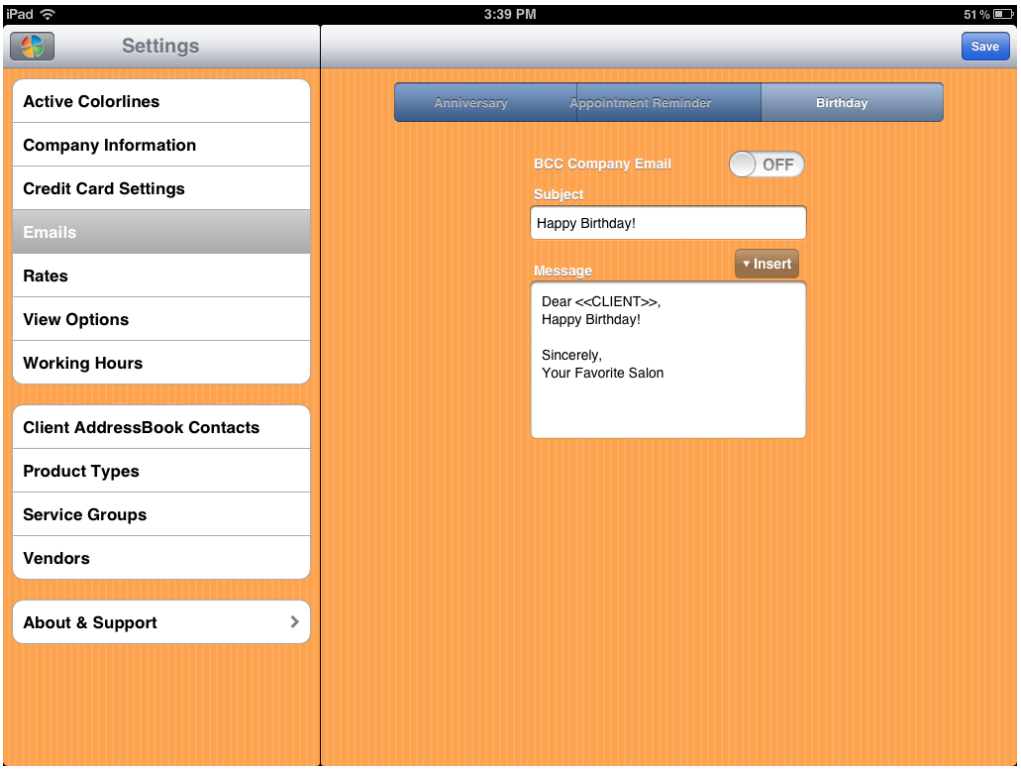
You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit



How To Email Birthdays Reminders

The Birthday standard email message is below. The space <<CLIENT>> is used as a placement holder for your data. When you send out Birthday emails, the Clients name is automatically inserted into the email where noted.

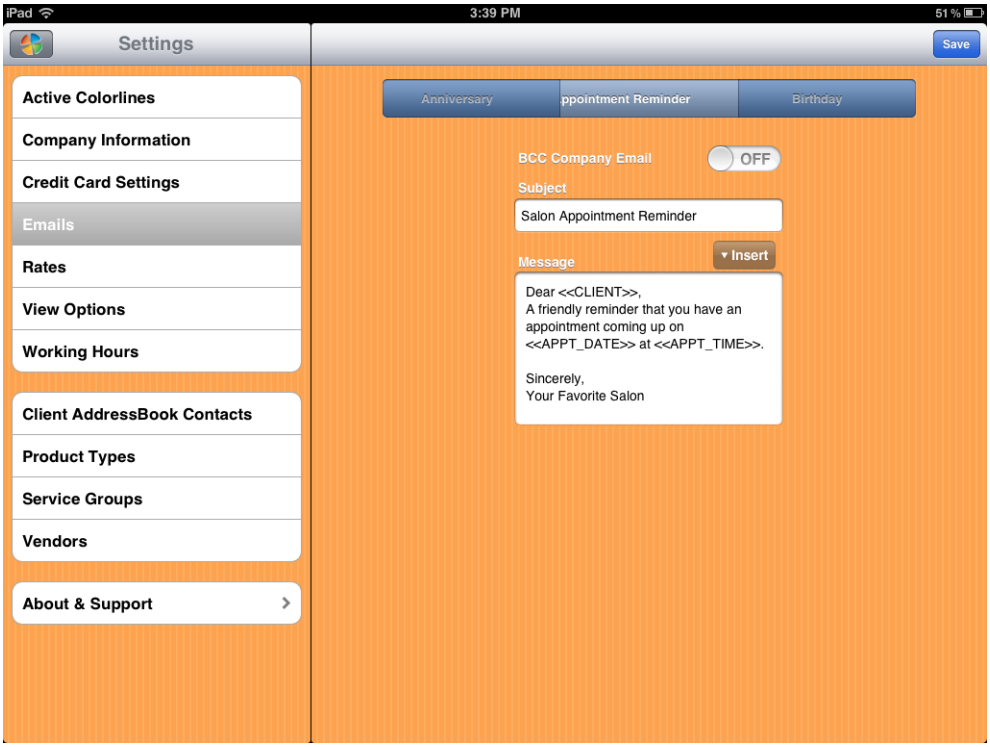
You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit and type away. If you accidentally remove <<CLIENT>>, you can re-insert it by using the INSERT button.



How To Email Appointment Reminders

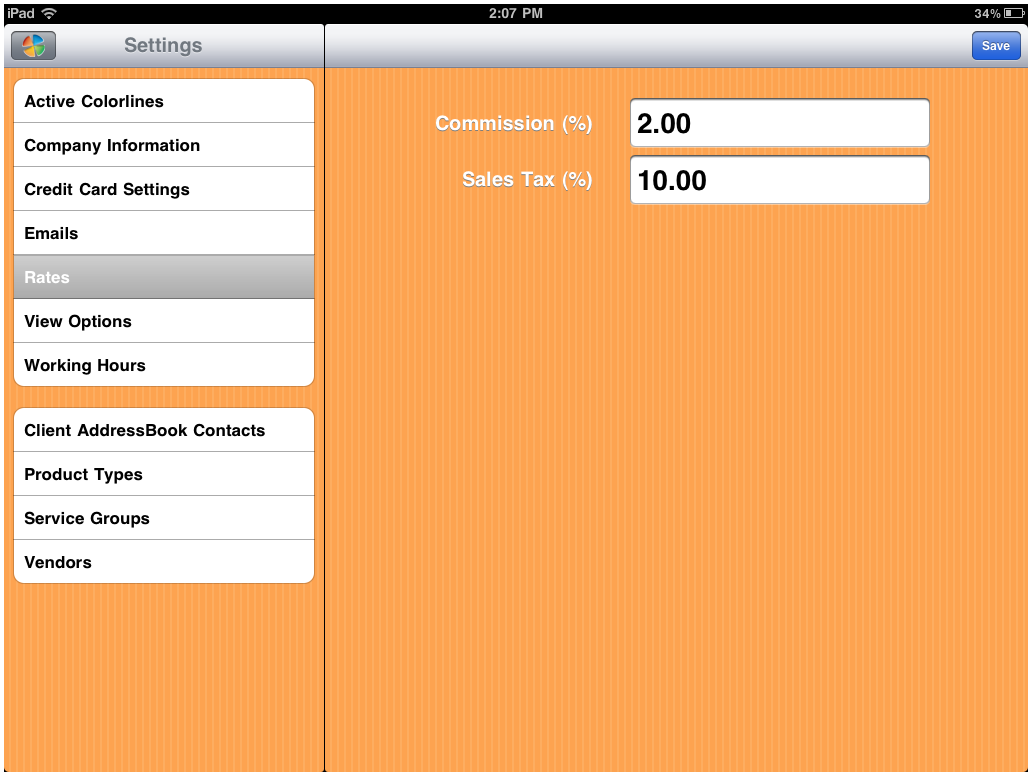
The Appointment Reminders standard email message is below. The space <<CLIENT>> is used as a placement holder for your data. When you send out Birthday emails, the Clients name is automatically inserted into the email where noted.

You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit and type away. If you accidentally remove <<CLIENT>>, you can re-insert it by using the INSERT button.



Rates

The Rates screen will display after selecting **Rates** from the **Company Info screen**.



RATES	
Commission (%)	The commission rate indicates the percentage of sales to be considered income. The commission rate is utilized in the reports section of SALON MANAGER.
Sales Tax (%)	Indicate the percentage of sales tax to charge on taxable Products/Services

Note: Commission & Sales Tax Rates are optional

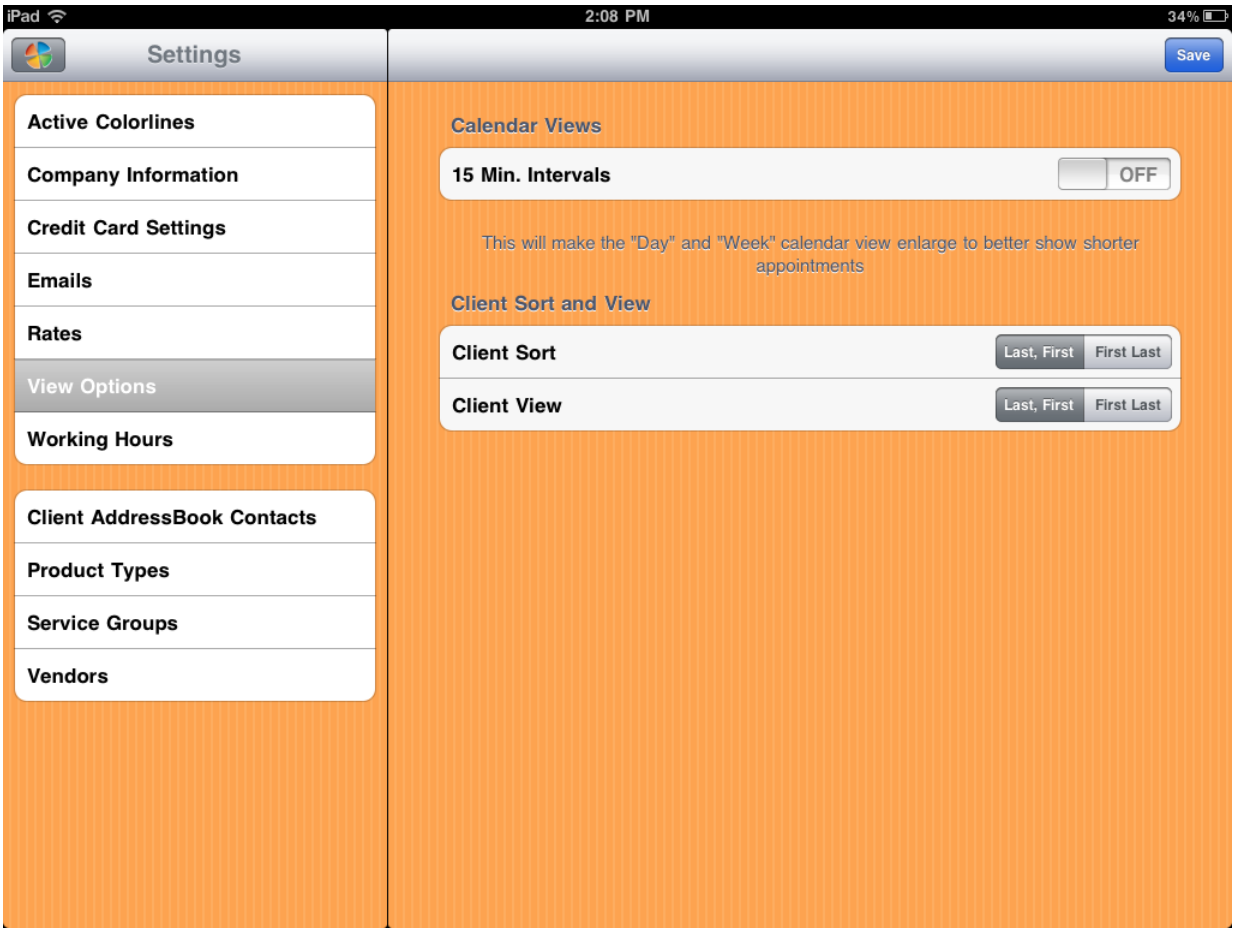
View Options

The View Options screen allows you to decide how your schedule will look.

The first option here is Calendar Views. Your Calendar can display in 30 minute intervals or 15 minute intervals. To have 15 minute intervals, touch OFF to ON.

Also, you can display how you want your Clients names to appear in the Client module. You have the choice to sort by Last Name, First Name or First Name, Last Name.

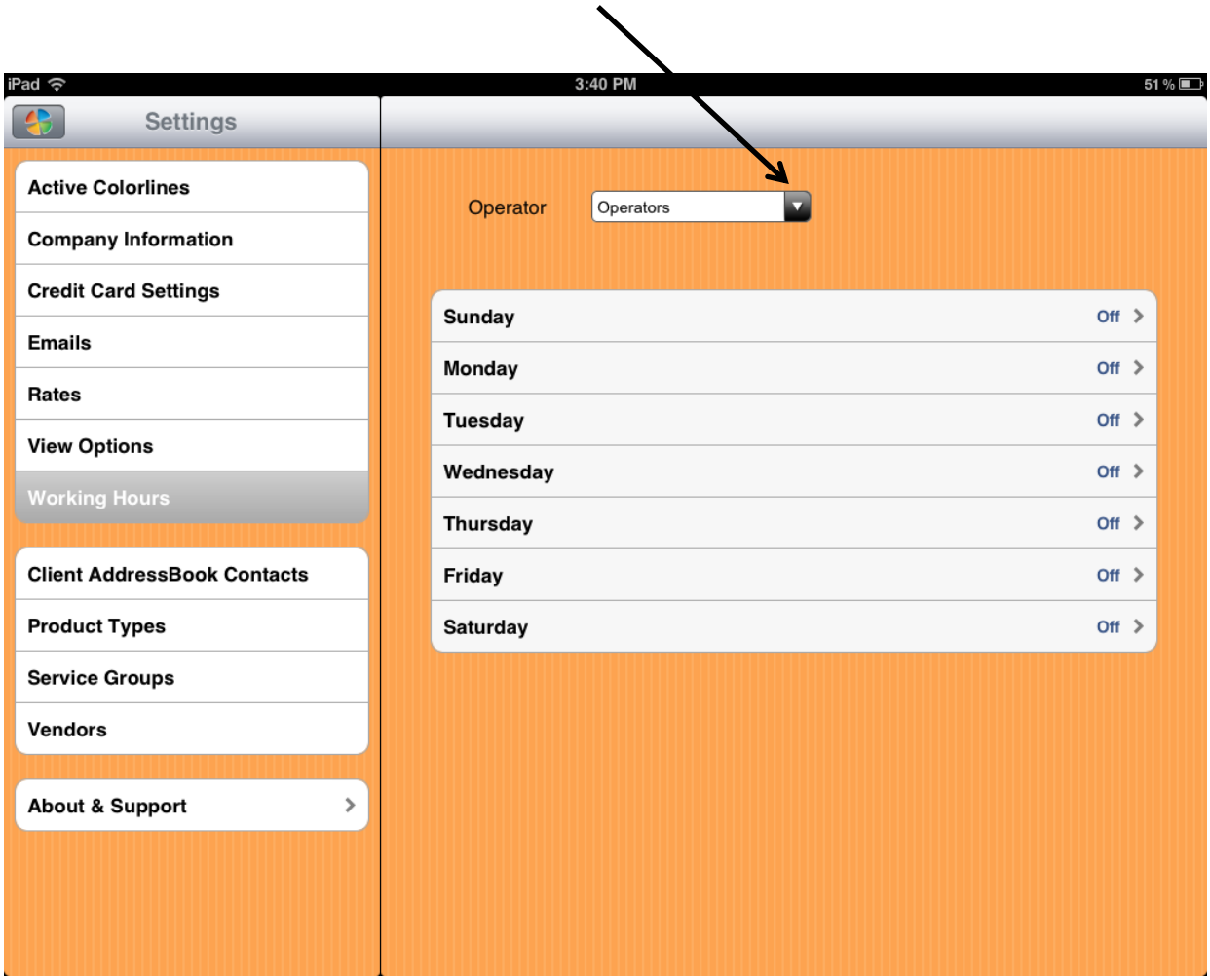
You may also choose how to view Clients. You many view clients by Last Name, First Name or First Name/Last Name.



Working Hours

The Working Hours screen is used to indicate each Operators hours of availability. This information is then translated into each Operators schedule. Knowing another Operators availability allows others to book appointments for them while they are busy with a customer.

To switch between different Operators, use the drop down menu as displayed.



IMPORTANT!

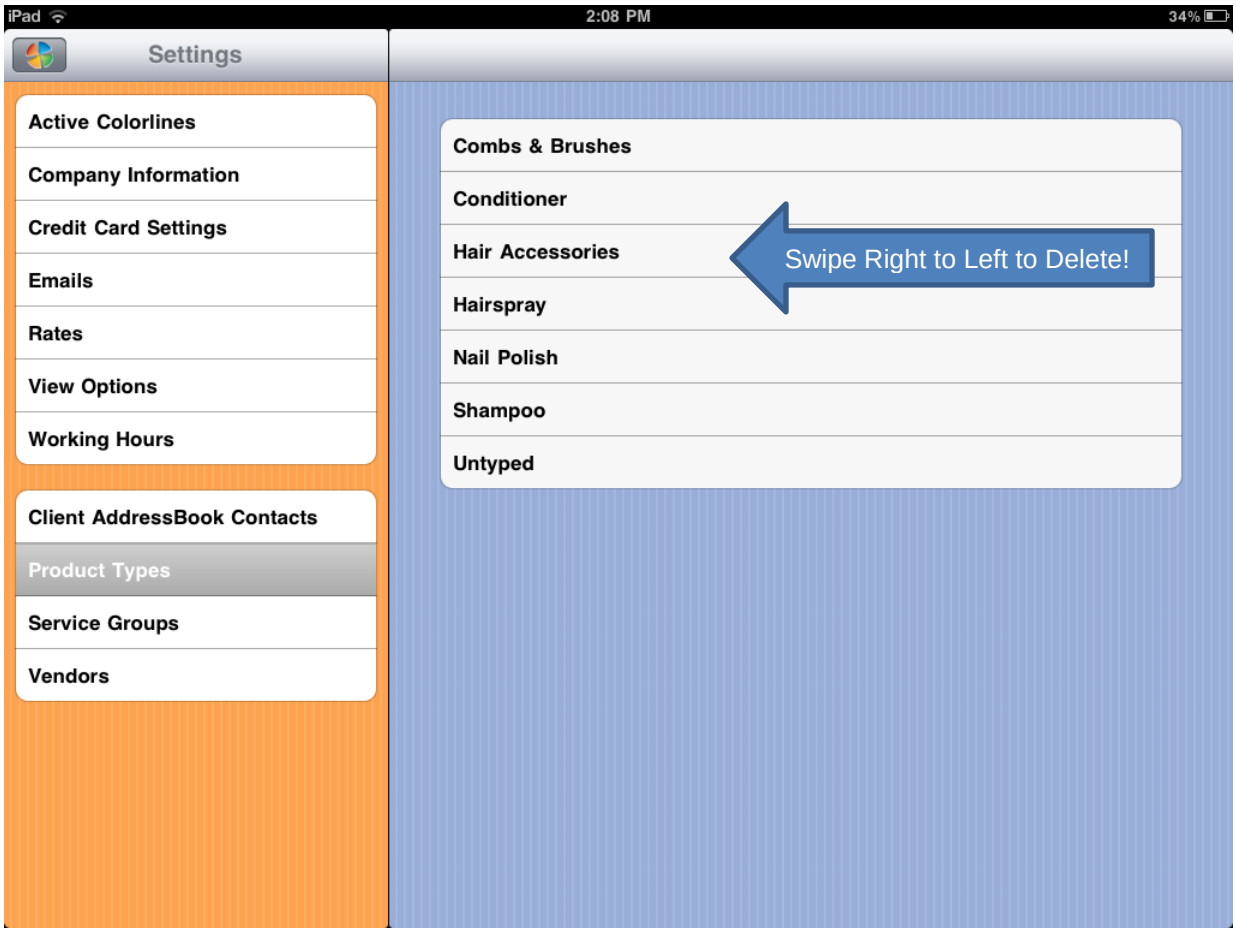
You must enter your Operators BEFORE setting their hours!! Go to the Main Menu and select Operators to enter Operators for your business.

Product Types

Product Types displays all your classifications of Products by Product Type. Product Types are **automatically created** when entering a Product from Products displayed on the Main Menu. You may only delete Service Groups from this screen.

To DELETE a Service Group → SWIPE from right to left at the very end of the Service Group.

At that time, a RED DELETE Button will display. Simply touch Delete Button:

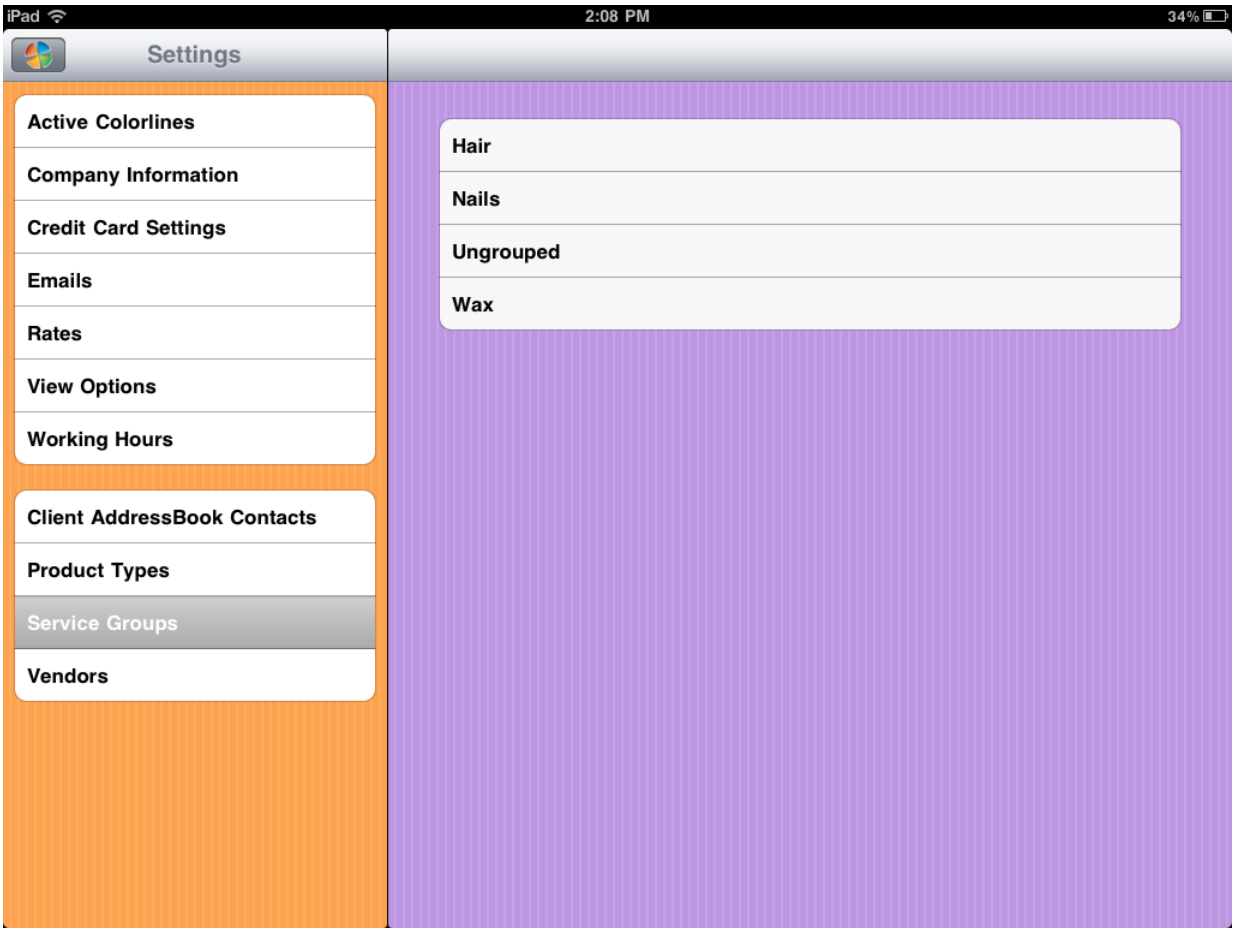


Service Groups

Service Groups displays all your classifications of Services by Service Groups. Service Groups are **automatically created** when entering a Service from Services Menu displayed on the Main Menu. You may only delete Service Groups from this screen.

To DELETE a Service Group → SWIPE from right to left at the very end of the Service Group.

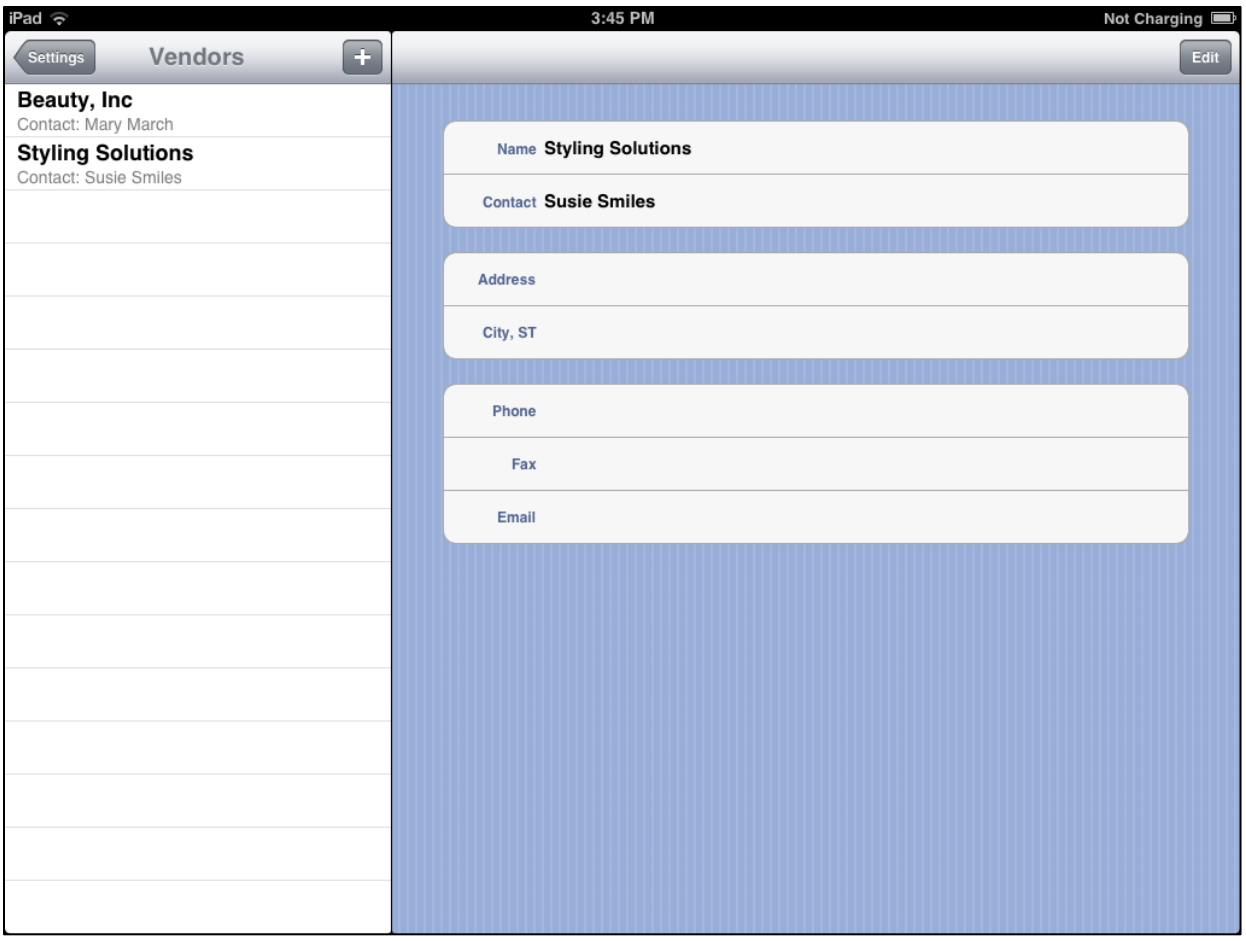
At that time, a RED DELETE Button will display. Simply touch Delete Button: Delete



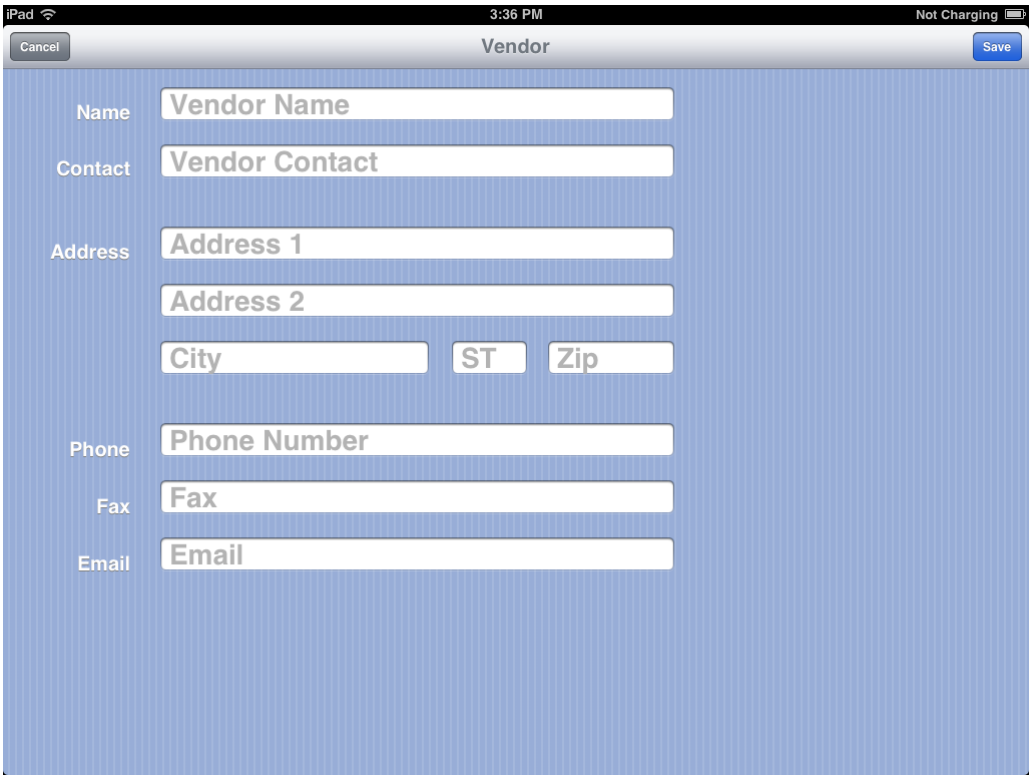
Vendors

Optionally, you may enter Vendors for the Products that you sell in your business. We recommend that you enter Vendors for all your Products for reporting purposes.

To ADD a Vendor → click on + from the screen below:



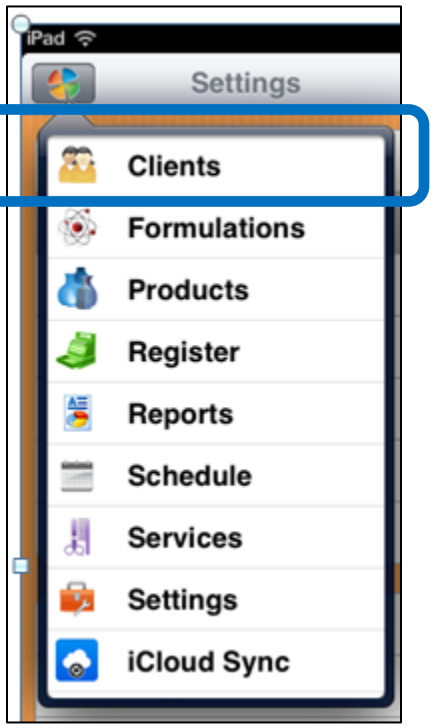
After you hit the + sign, the following screen will display. We encourage you to enter as much information as you can for Reporting Purposes.



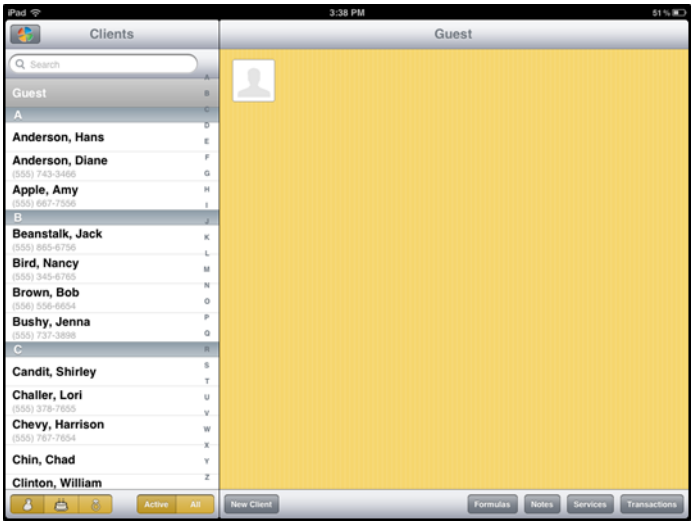
Vendors	
Vendor Name	Required. The name of the vendor.
Vendor Contact	Person at your Vendor that you contact the most.
Address 1 & 2	Address of your vendor. Use second address line when needed
City	City where Vendor does business.
State	State where Vendor does business.
Zip code	Zip code of Vendor
Phone	Vendor Phone Number

CHAPTER 3 – CLIENTS

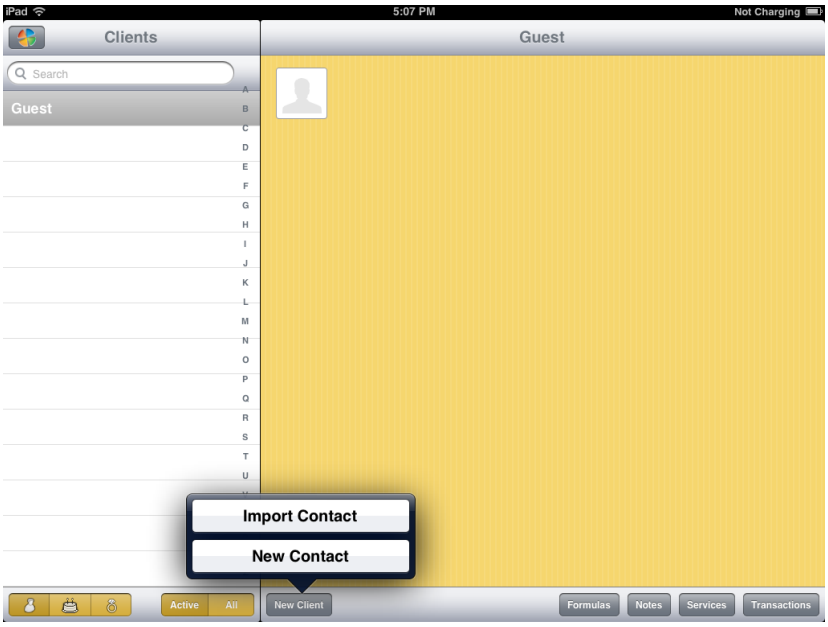
Overview



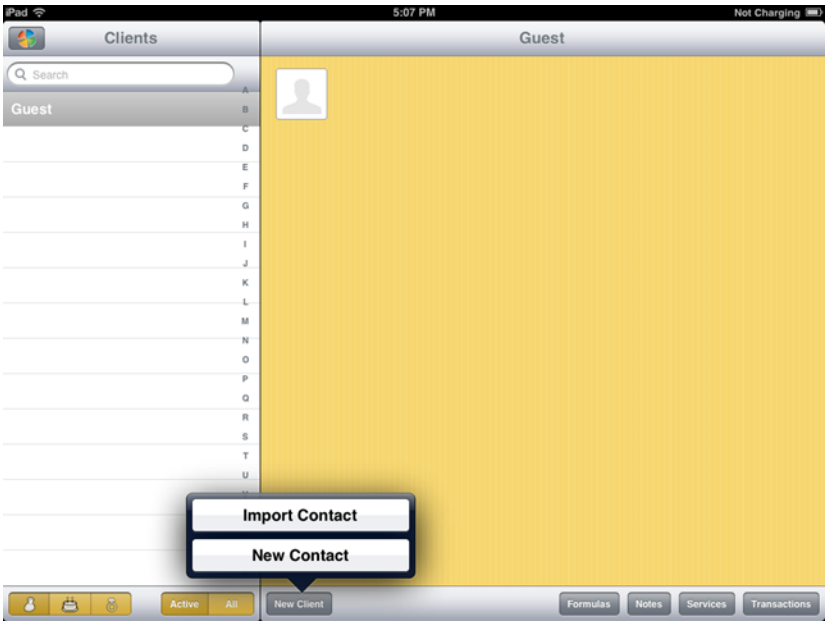
Adding Clients

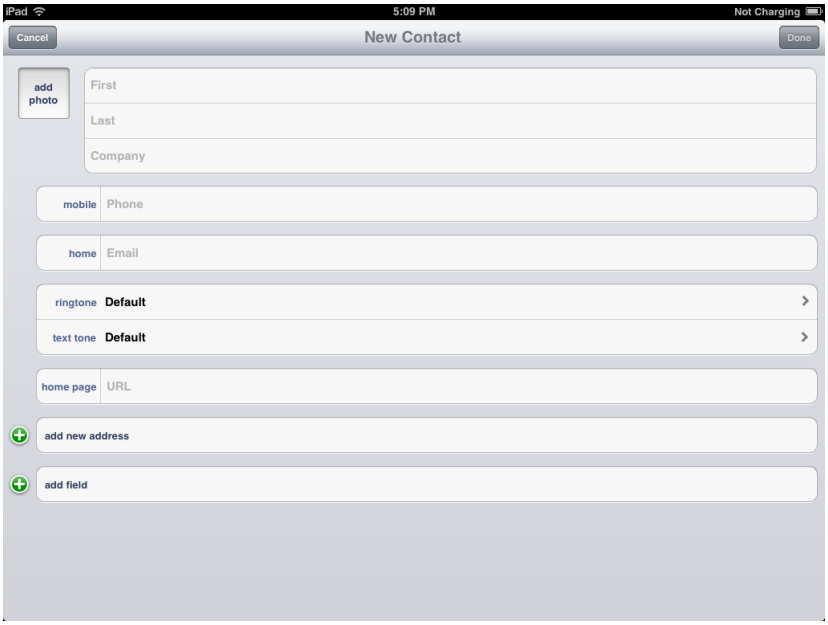


Importing



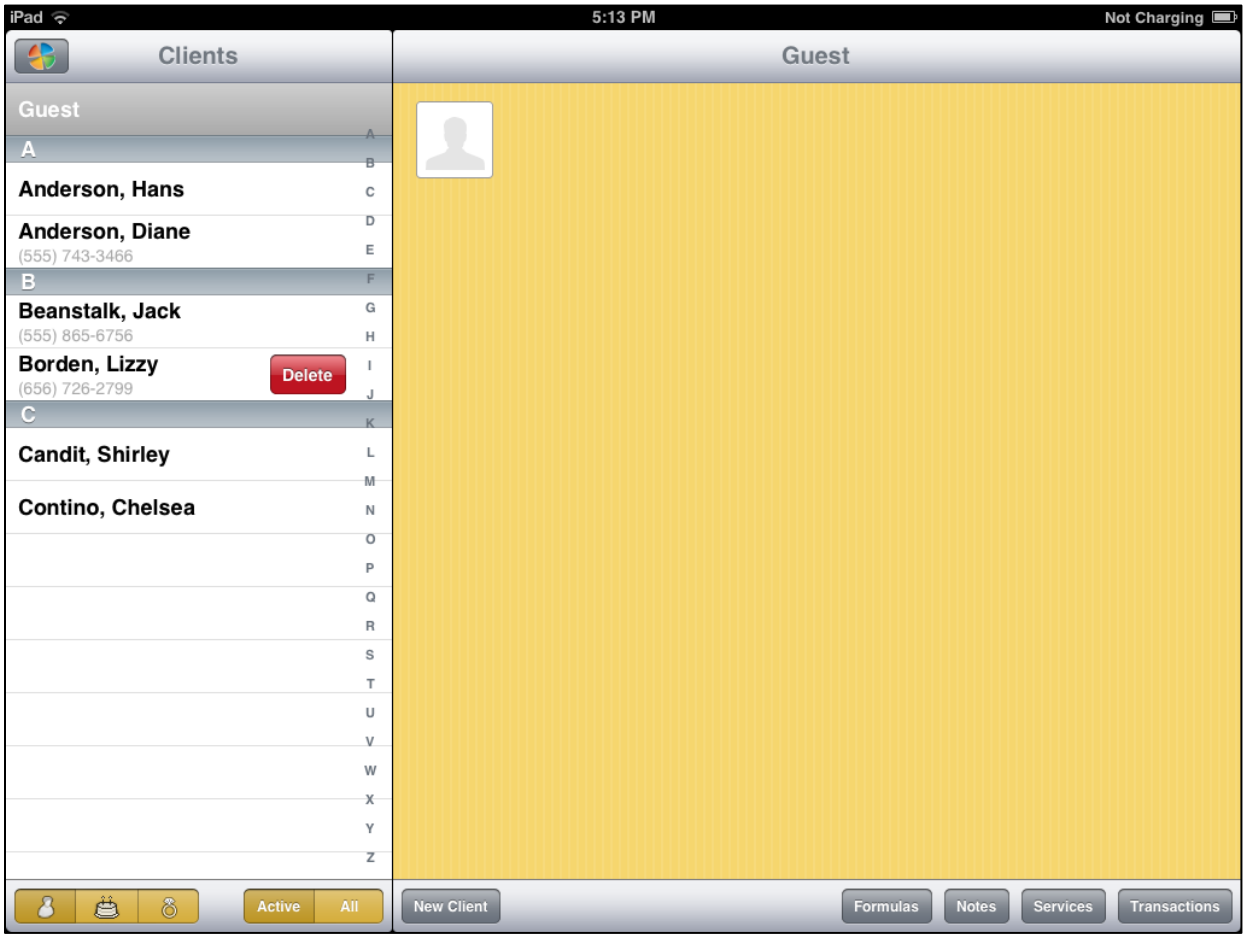
New Contact


iPad
5:07 PM
Not Charging
Clients
Guest
Search
Guest
Import Contact
New Contact
Active
All
New Client
Formulas
Notes
Services
Transactions


iPad
5:09 PM
Not Charging
Cancel
New Contact
Done
add photo
First
Last
Company
mobile
Phone
home
Email
ringtone
Default
text tone
Default
home page
URL
add new address
add field

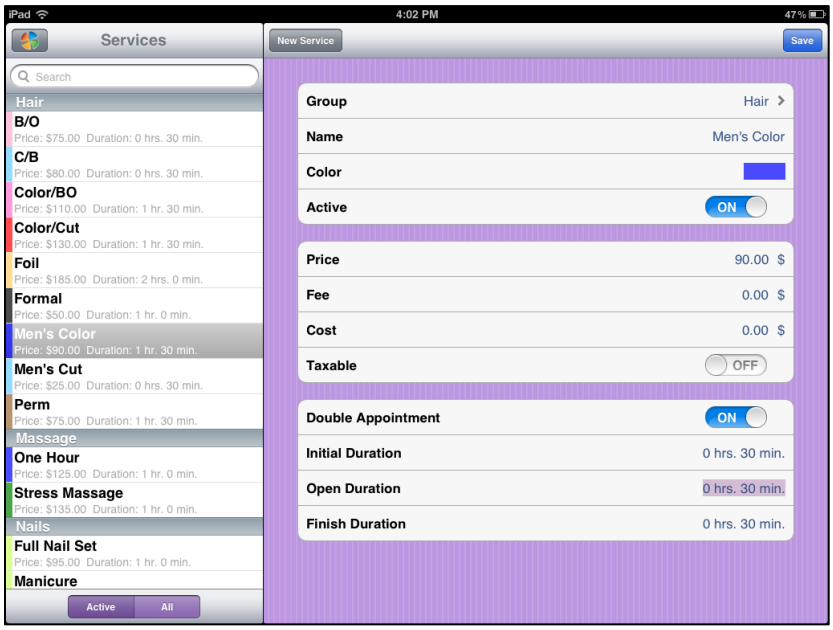
Deleting Clients

Delete

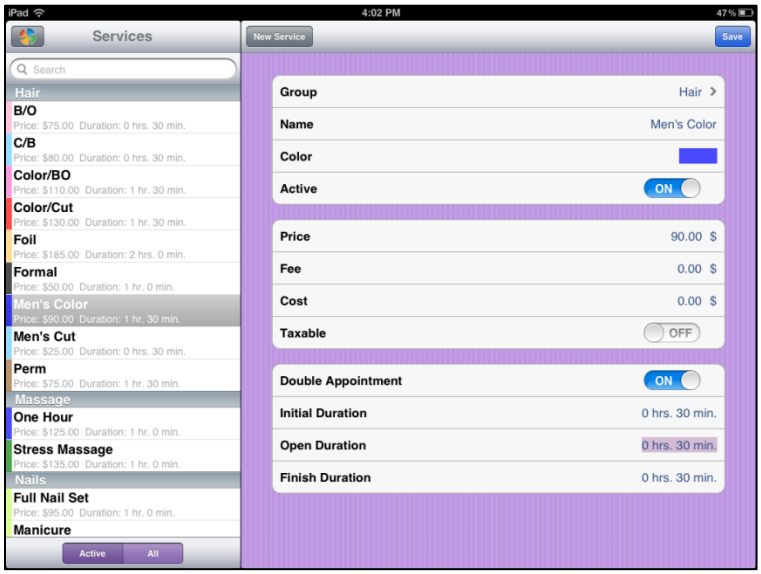


CHAPTER 4 - SERVICES

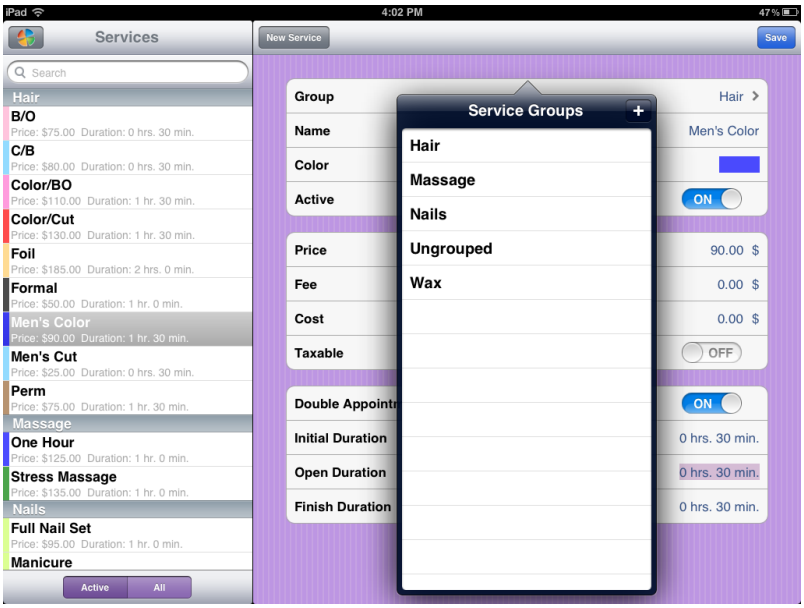
Overview

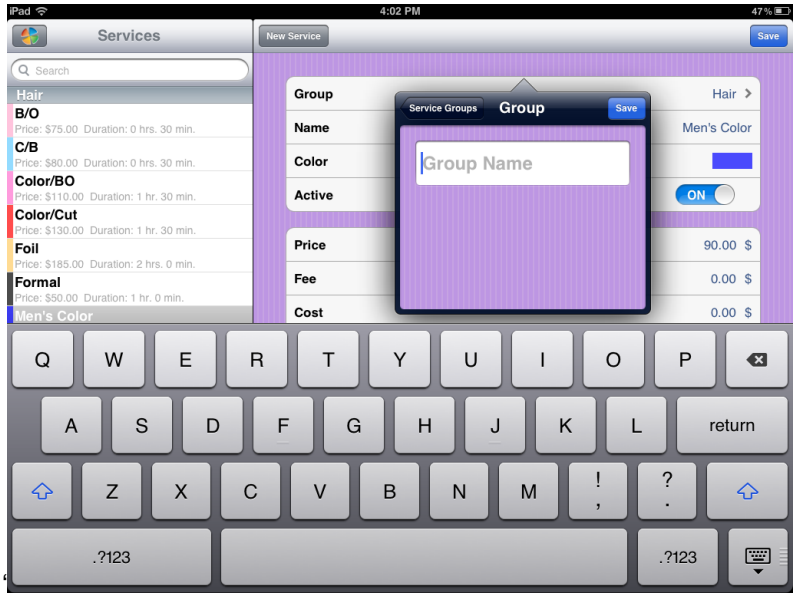


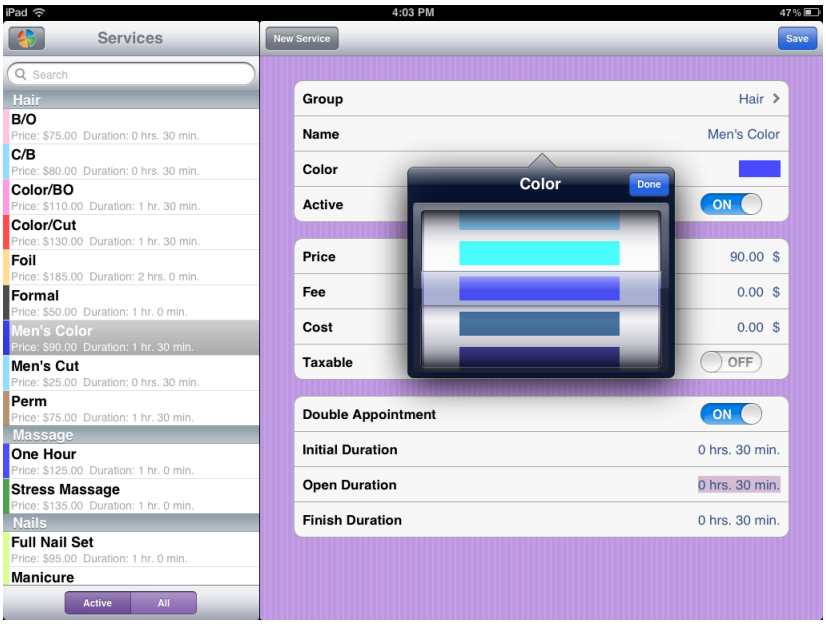
Adding A Service

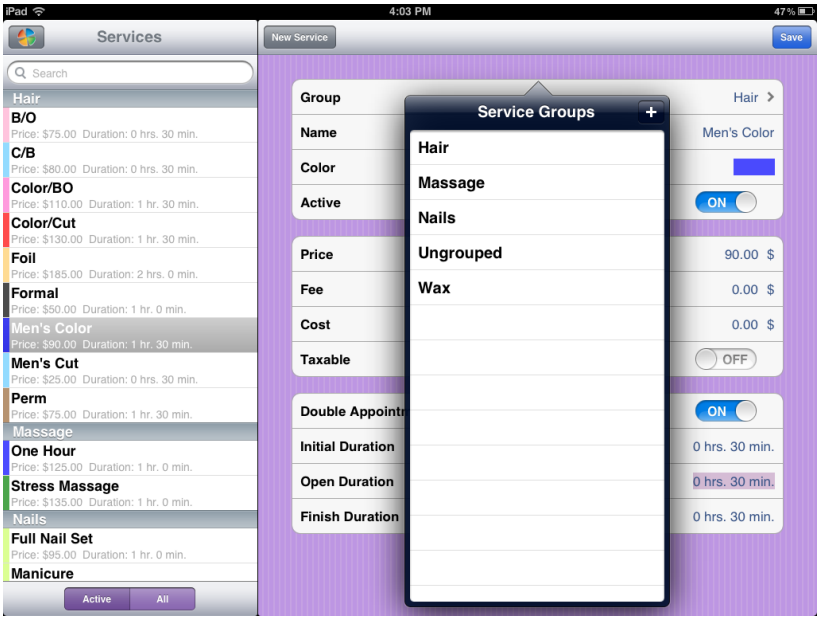


SERVICES
Group
Name
Color
Active
Price
Fee
Cost
Taxable
Double Appointment
Initial Duration
Open Duration
Finish Duration


iPad
4:02 PM
47%
Services
Search
New Service
Save
Hair
B/O
Price: $75.00 Duration: 0 hrs. 30 min.
C/B
Price: $80.00 Duration: 0 hrs. 30 min.
Color/BO
Price: $110.00 Duration: 1 hr. 30 min.
Color/Cut
Price: $130.00 Duration: 1 hr. 30 min.
Foil
Price: $185.00 Duration: 2 hrs. 0 min.
Formal
Price: $50.00 Duration: 1 hr. 0 min.
Men's Color
Price: $90.00 Duration: 1 hr. 30 min.
Men's Cut
Price: $25.00 Duration: 0 hrs. 30 min.
Perm
Price: $75.00 Duration: 1 hr. 30 min.
Massage
One Hour
Price: $125.00 Duration: 1 hr. 0 min.
Stress Massage
Price: $135.00 Duration: 1 hr. 0 min.
Nails
Full Nail Set
Price: $95.00 Duration: 1 hr. 0 min.
Manicure
Active
All
Group
Hair
Name
Men's Color
Color
Active
ON
Service Groups
Hair
Massage
Nails
Ungrouped
Wax
Price
90.00 $
Fee
0.00 $
Cost
0.00 $
Taxable
OFF
Double Appointr
ON
Initial Duration
0 hrs. 30 min.
Open Duration
0 hrs. 30 min.
Finish Duration
0 hrs. 30 min.


iPad
4:02 PM
47%
Services
Search
New Service
Save
Hair
B/O
Price: $75.00 Duration: 0 hrs. 30 min.
C/B
Price: $80.00 Duration: 0 hrs. 30 min.
Color/BO
Price: $110.00 Duration: 1 hr. 30 min.
Color/Cut
Price: $130.00 Duration: 1 hr. 30 min.
Foil
Price: $185.00 Duration: 2 hrs. 0 min.
Formal
Price: $50.00 Duration: 1 hr. 0 min.
Men's Color
Group
Hair
Name
Men's Color
Color
Active
ON
Service Groups
Group
Save
Group Name
Price
90.00 $
Fee
0.00 $
Cost
0.00 $
Q W E R T Y U I O P
A S D F G H J K L return
Z X C V B N M ! , ? .
.?123
.?123


iPad
4:03 PM
47%
Services
Search
New Service
Save
Hair
B/O
Price: $75.00 Duration: 0 hrs. 30 min.
C/B
Price: $80.00 Duration: 0 hrs. 30 min.
Color/BO
Price: $110.00 Duration: 1 hr. 30 min.
Color/Cut
Price: $130.00 Duration: 1 hr. 30 min.
Foil
Price: $185.00 Duration: 2 hrs. 0 min.
Formal
Price: $50.00 Duration: 1 hr. 0 min.
Men's Color
Price: $90.00 Duration: 1 hr. 30 min.
Men's Cut
Price: $25.00 Duration: 0 hrs. 30 min.
Perm
Price: $75.00 Duration: 1 hr. 30 min.
Massage
One Hour
Price: $125.00 Duration: 1 hr. 0 min.
Stress Massage
Price: $135.00 Duration: 1 hr. 0 min.
Nails
Full Nail Set
Price: $95.00 Duration: 1 hr. 0 min.
Manicure
Active
All
Group
Hair
Name
Men's Color
Color
Active
ON
Color
Done
Price
90.00 $
Fee
0.00 $
Cost
0.00 $
Taxable
OFF
Double Appointment
ON
Initial Duration
0 hrs. 30 min.
Open Duration
0 hrs. 30 min.
Finish Duration
0 hrs. 30 min.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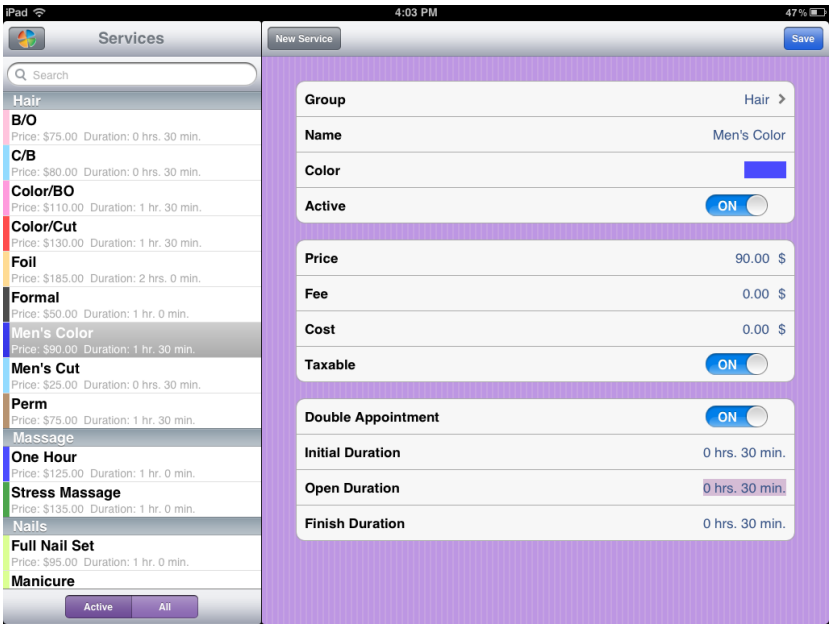
Services
Search
New Service
Save
Hair
B/O
Price: $75.00 Duration: 0 hrs. 30 min.
C/B
Price: $80.00 Duration: 0 hrs. 30 min.
Color/BO
Price: $110.00 Duration: 1 hr. 30 min.
Color/Cut
Price: $130.00 Duration: 1 hr. 30 min.
Foil
Price: $185.00 Duration: 2 hrs. 0 min.
Formal
Price: $50.00 Duration: 1 hr. 0 min.
Men's Color
Price: $90.00 Duration: 1 hr. 30 min.
Men's Cut
Price: $25.00 Duration: 0 hrs. 30 min.
Perm
Price: $75.00 Duration: 1 hr. 30 min.
Massage
One Hour
Price: $125.00 Duration: 1 hr. 0 min.
Stress Massage
Price: $135.00 Duration: 1 hr. 0 min.
Nails
Full Nail Set
Price: $95.00 Duration: 1 hr. 0 min.
Manicure
Active
All
Group
Hair
Name
Men's Color
Color
Active
ON
Service Groups
Hair
Massage
Nails
Ungrouped
Wax
Price
90.00 $
Fee
0.00 $
Cost
0.00 $
Taxable
OFF
ON
Initial Duration
0 hrs. 30 min.
Open Duration
0 hrs. 30 min.
Finish Duration
0 hrs. 30 min.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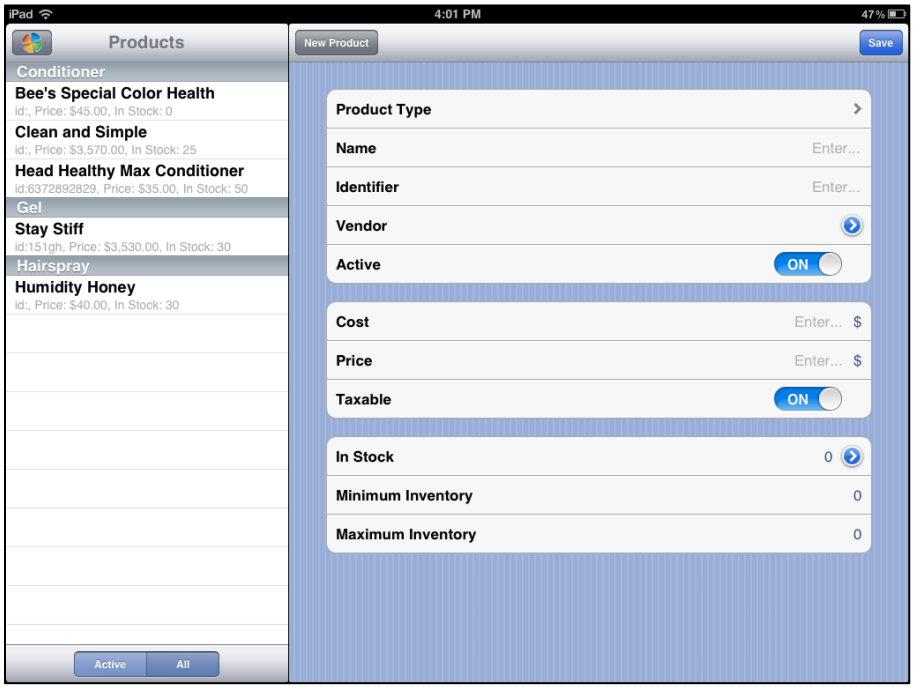
Services
Search
Hair
B/O
Price: $75.00 Duration: 0 hrs. 30 min.
C/B
Price: $80.00 Duration: 0 hrs. 30 min.
Color/BO
Price: $110.00 Duration: 1 hr. 30 min.
Color/Cut
Price: $130.00 Duration: 1 hr. 30 min.
Foil
Price: $185.00 Duration: 2 hrs. 0 min.
Formal
Price: $50.00 Duration: 1 hr. 0 min.
Men's Color
Price: $90.00 Duration: 1 hr. 30 min.
Men's Cut
Price: $25.00 Duration: 0 hrs. 30 min.
Perm
Price: $75.00 Duration: 1 hr. 30 min.
Massage
One Hour
Price: $125.00 Duration: 1 hr. 0 min.
Stress Massage
Price: $135.00 Duration: 1 hr. 0 min.
Nails
Full Nail Set
Price: $95.00 Duration: 1 hr. 0 min.
Manicure
Active
All
New Service
Save
Group
Hair
Name
Men's Color
Color
Active
ON
Price
90.00 $
Fee
0.00 $
Cost
0.00 $
Taxable
ON
Double Appointment
ON
Initial Duration
0 hrs. 30 min.
Open Duration
0 hrs. 30 min.
Finish Duration
0 hrs. 30 min.

Deleting A Service

FDSALKJFDAS

CHAPTER 5 – PRODUCTS

Overview

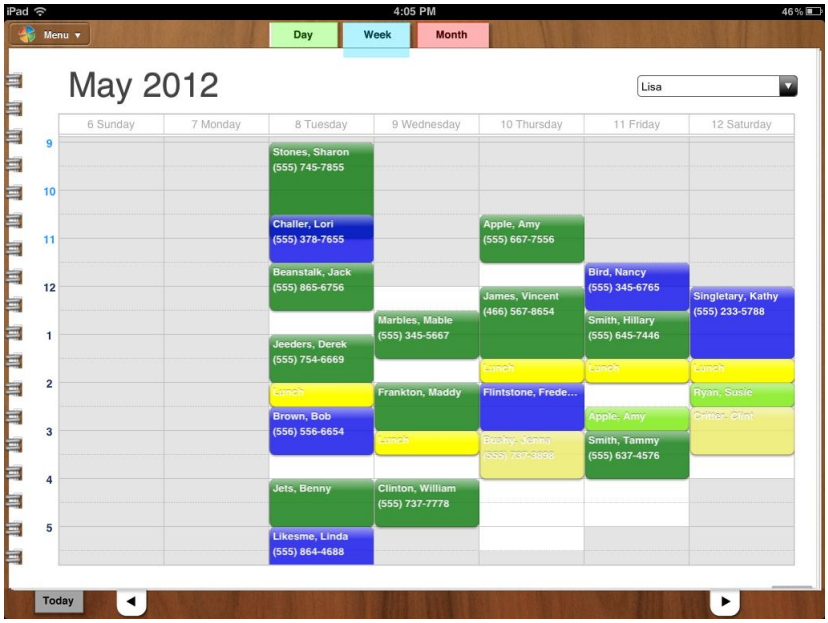


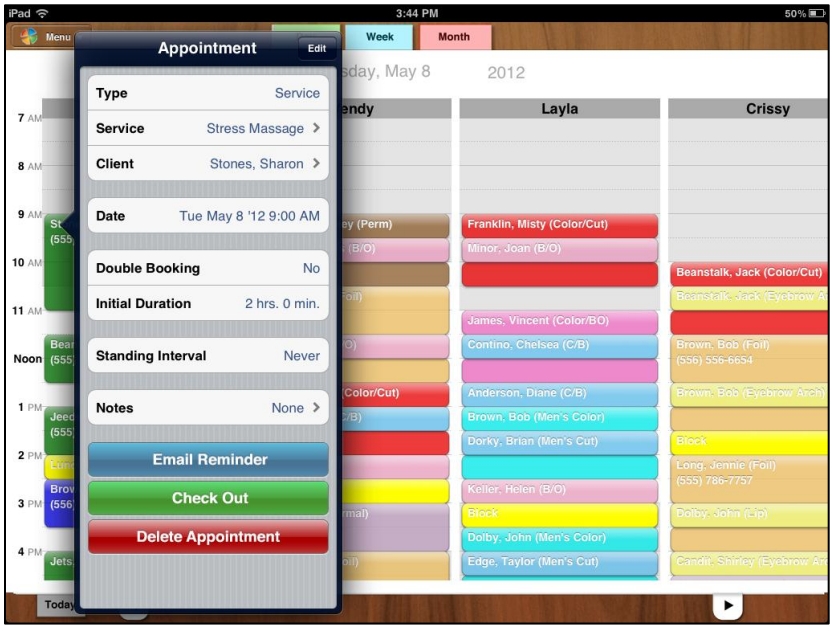
Adding A Product

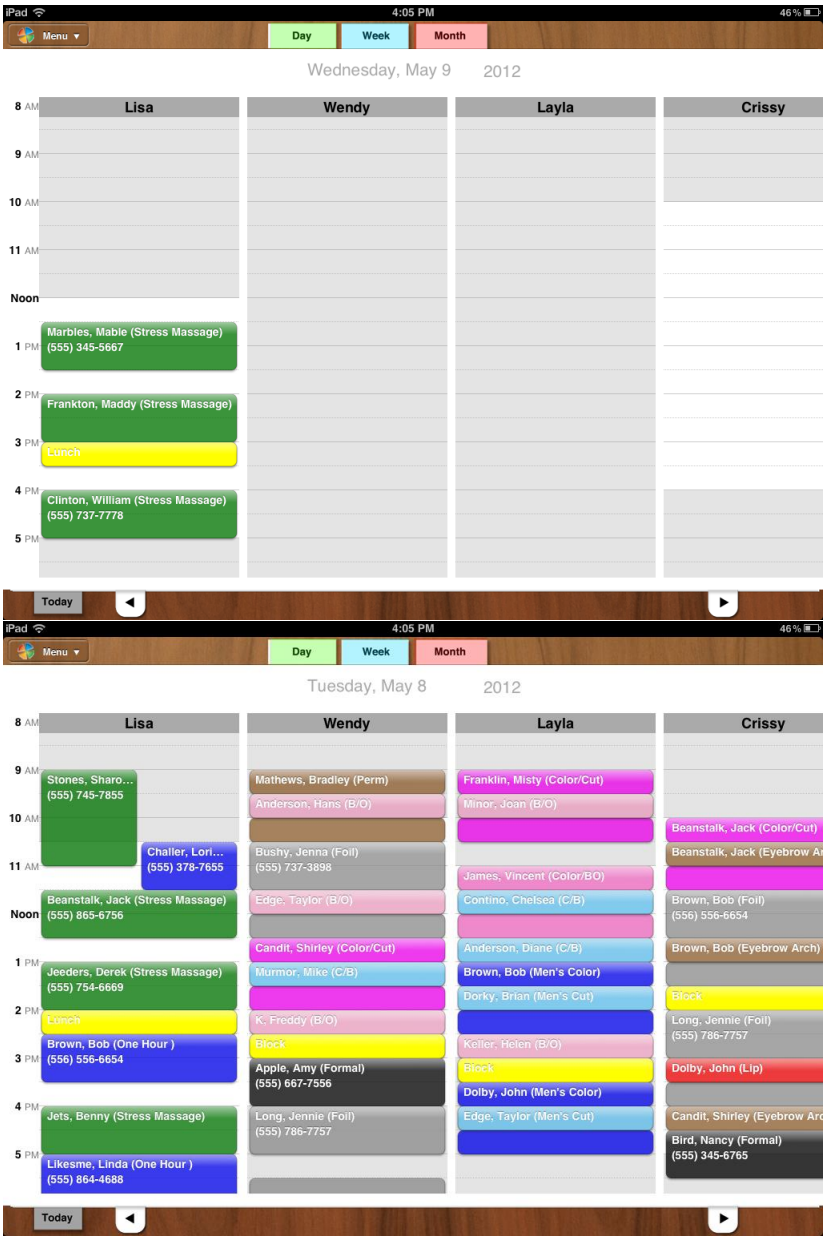
SERVICES
Product Type
Name
Identifier
Vendor
Active
Cost
Price
Taxable
In Stock
Minimum Inventory
Maximum Inventory

CHAPTER 7 – THE SCHEDULE

Overview



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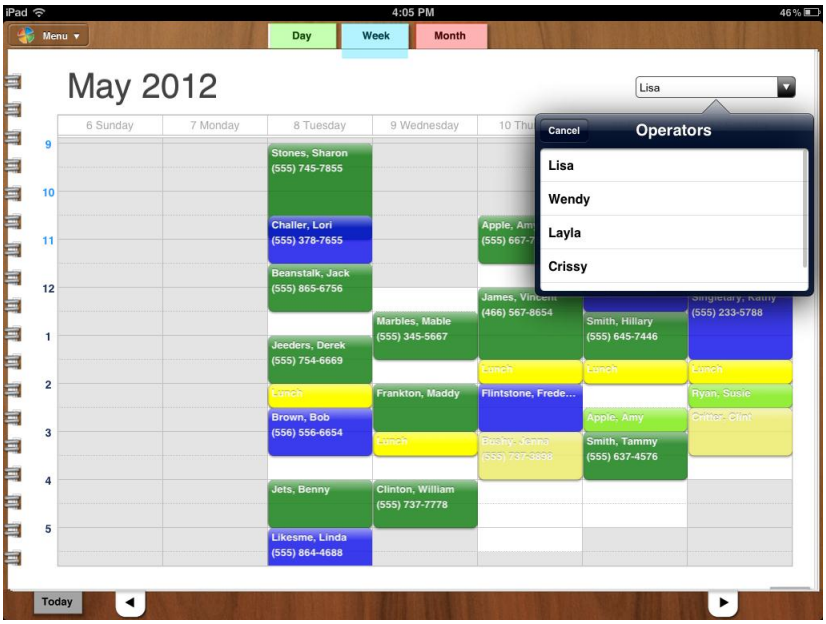
Menu
Day
Week
Month
Wednesday, May 9 2012
Lisa
Wendy
Layla
Crissy
8 AM
9 AM
10 AM
11 AM
Noon
1 PM
2 PM
3 PM
4 PM
5 PM
Marbles, Mable (Stress Massage)
(555) 345-5667
Frankton, Maddy (Stress Massage)
Lunch
Clinton, William (Stress Massage)
(555) 737-7778
Today
iPad
4:05 PM
46%
Menu
Day
Week
Month
Tuesday, May 8 2012
Lisa
Wendy
Layla
Crissy
Stones, Sharo...
(555) 745-7855
Challer, Lori...
(555) 378-7655
Beanstalk, Jack (Stress Massage)
(555) 865-6756
Jeeders, Derek (Stress Massage)
(555) 754-6669
Lunch
Brown, Bob (One Hour)
(556) 556-6654
Jets, Benny (Stress Massage)
Likesme, Linda (One Hour)
(555) 864-4688
Mathews, Bradley (Perm)
Anderson, Hans (B/O)
Bushy, Jenna (Foil)
(555) 737-3898
Edge, Taylor (B/O)
Candit, Shirley (Color/Cut)
Murmor, Mike (C/B)
K, Freddy (B/O)
Block
Apple, Amy (Formal)
(555) 667-7556
Long, Jennie (Foil)
(555) 786-7757
Franklin, Misty (Color/Cut)
Minor, Joan (B/O)
James, Vincent (Color/BO)
Contino, Chelsea (C/B)
Anderson, Diane (C/B)
Brown, Bob (Men's Color)
Dorky, Brian (Men's Cut)
Keller, Helen (B/O)
Block
Dolby, John (Men's Color)
Edge, Taylor (Men's Cut)
Beanstalk, Jack (Color/Cut)
Brown, Bob (Foil)
(556) 556-6654
Brown, Bob (Eyebrow Arch)
Block
Long, Jennie (Foil)
(555) 786-7757
Dolby, John (Lip)
Bird, Nancy (Formal)
(555) 345-6765
Today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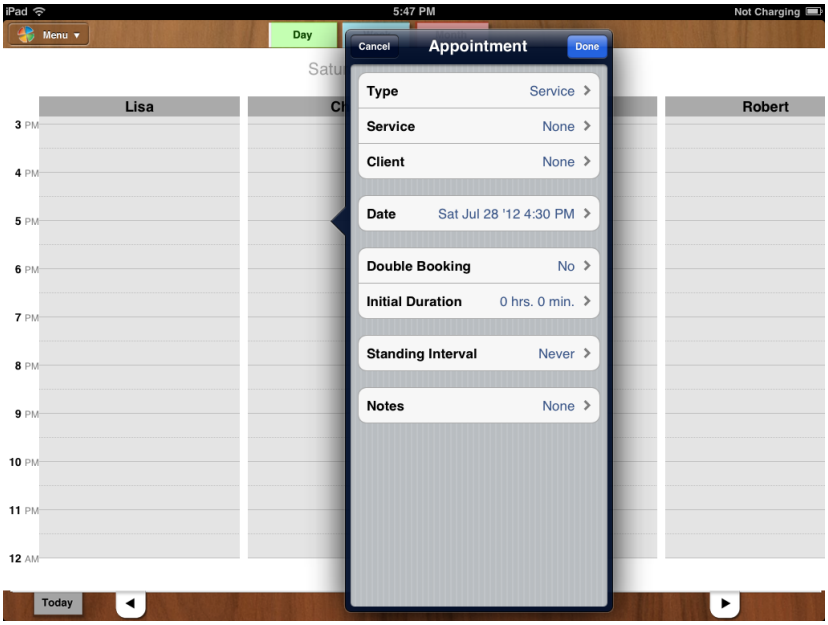
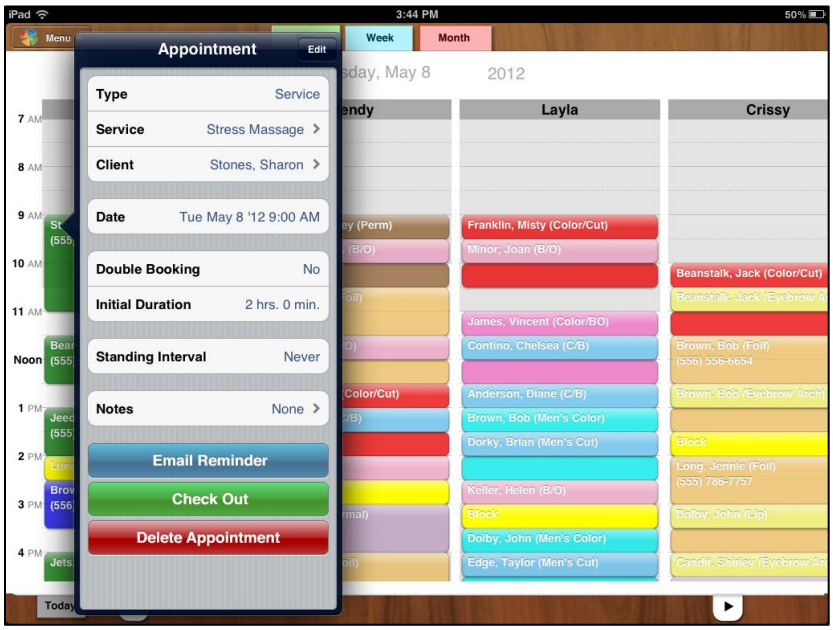
Menu
Day
Week
Month
May 2012
Lisa
6 Sunday
7 Monday
8 Tuesday
9 Wednesday
10 Thu
Cancel
Operators
Lisa
Wendy
Layla
Crissy
Stones, Sharon
(555) 745-7855
Challer, Lori
(555) 378-7655
Beanstalk, Jack
(555) 865-6756
Jeeders, Derek
(555) 754-6669
Lunch
Brown, Bob
(556) 556-6654
Jets, Benny
Likesme, Linda
(555) 864-4688
Marbles, Mable
(555) 345-5667
Frankton, Maddy
Lunch
Clinton, William
(555) 737-7778
Apple, Amy
(555) 637-4576
Smith, Hillary
(555) 645-7446
Lunch
Ryan, Susie
Smith, Tammy
(555) 637-4576
Today

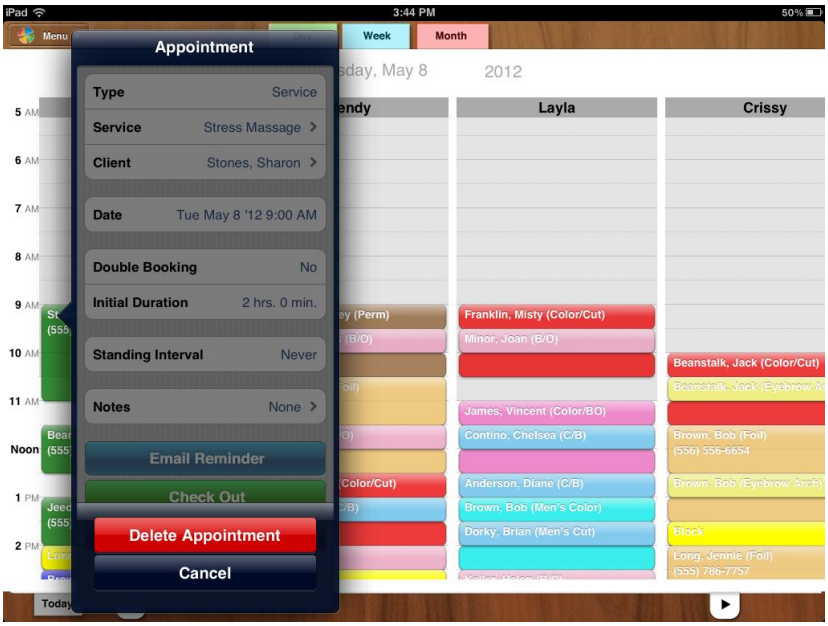
Adding An Appointment



Changing An Appointment

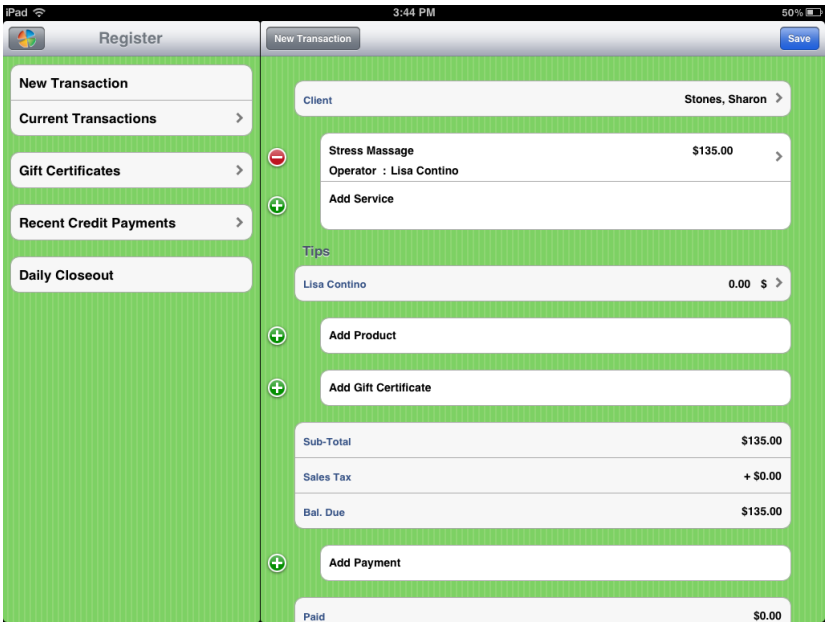


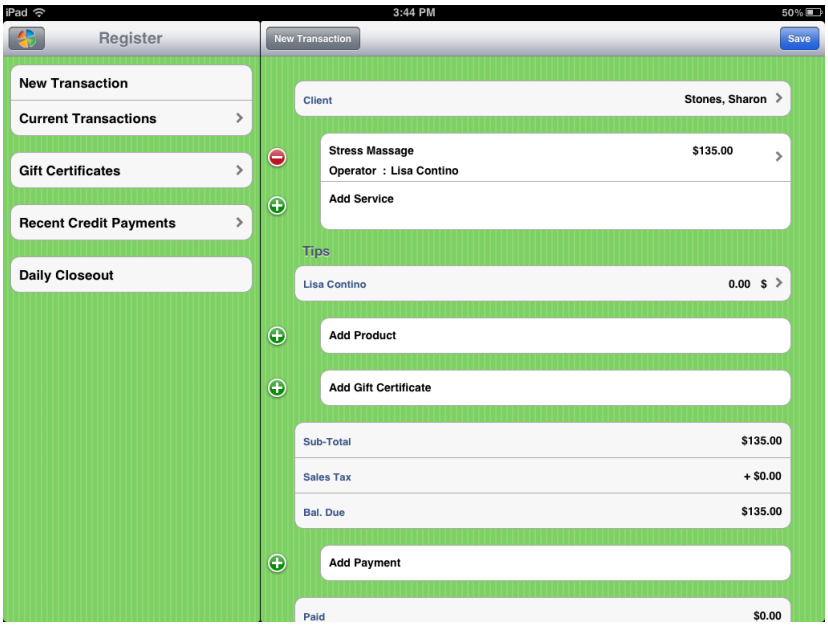
Deleting An Appointment



CHAPTER 8 - REGISTER

Overview





New Transaction

Adding A Service

Adding A Product

Adding A Gift Certificate

Adding A Payment

Current Transaction

Gift Certificates

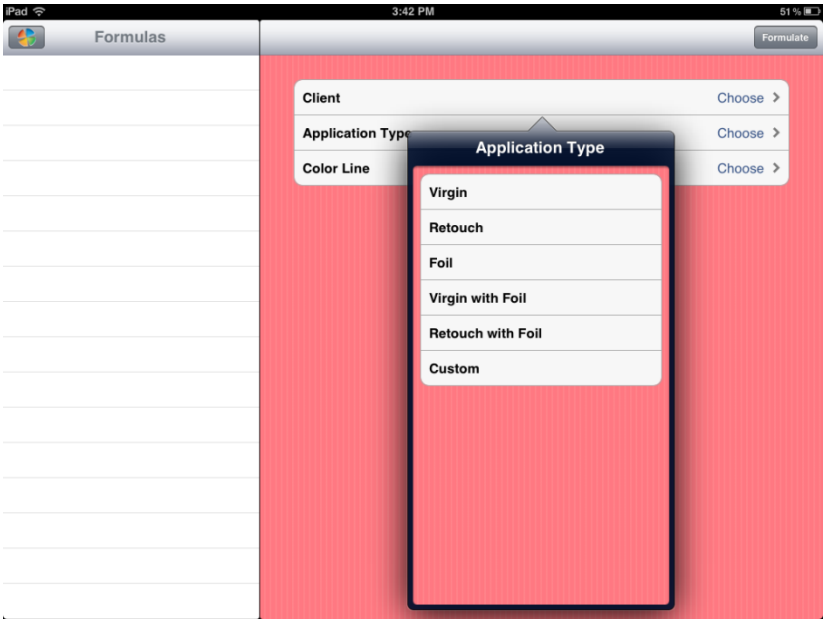
Recent Credit Payments

Daily Closeout

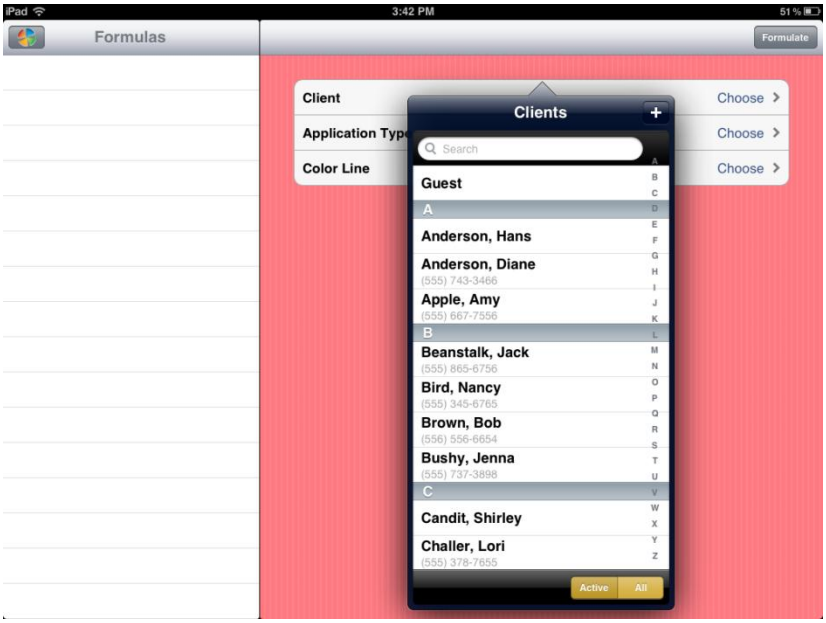
Voiding A Transaction

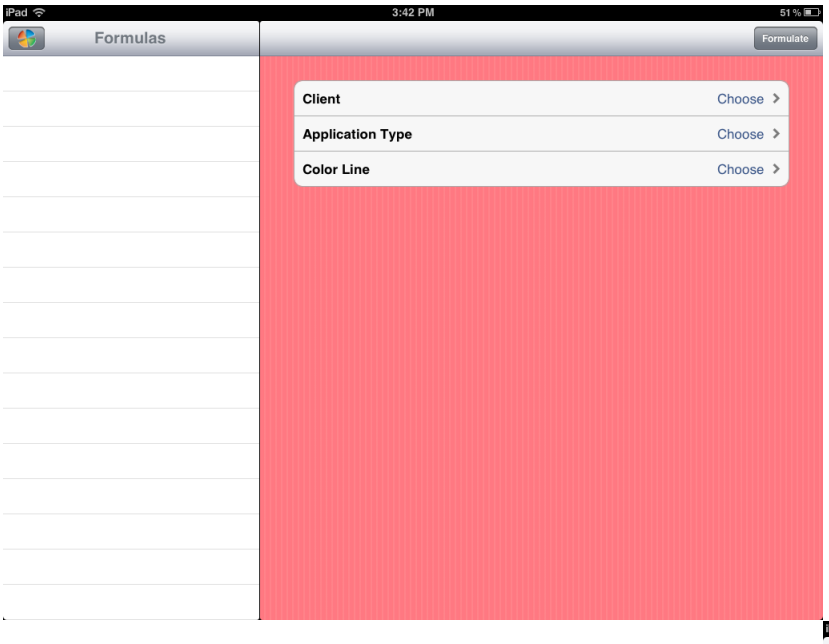
CHAPTER 8 - FORMULATIONS

Overview



Adding A Formula For A Client

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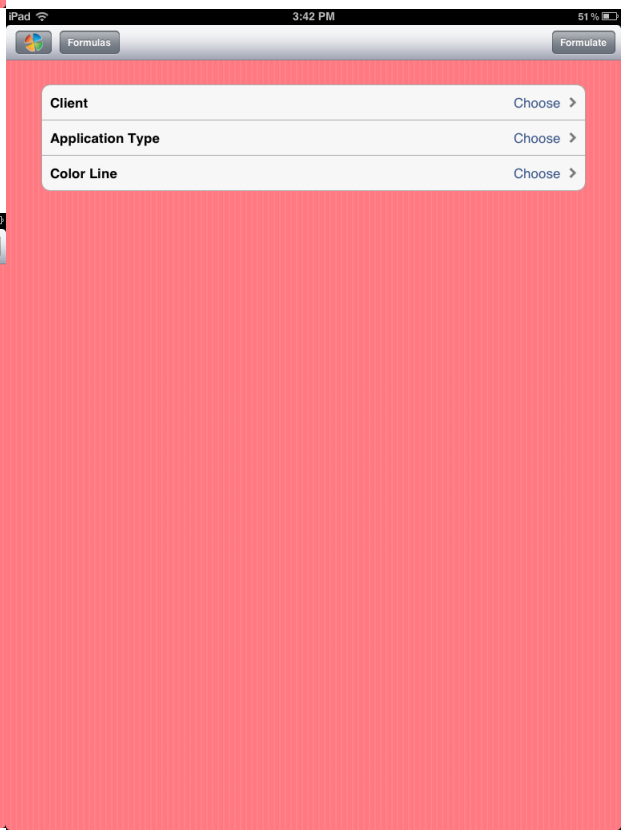
Formulas
Formulate
Client
Choose
Application Type
Choose
Color Line
Choose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Formulate
Client
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Application Type
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Color Line
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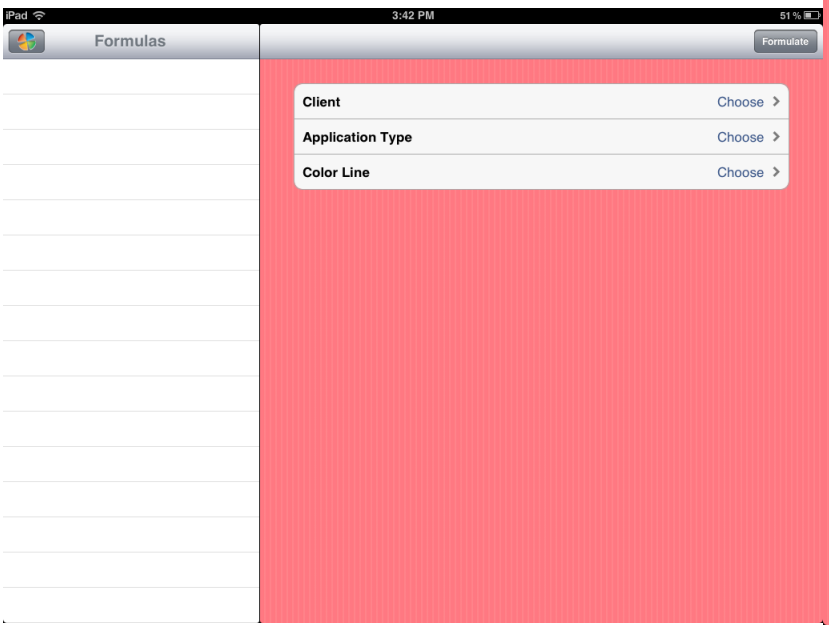
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Formulas
Formulate
Client
Choose
Application Type
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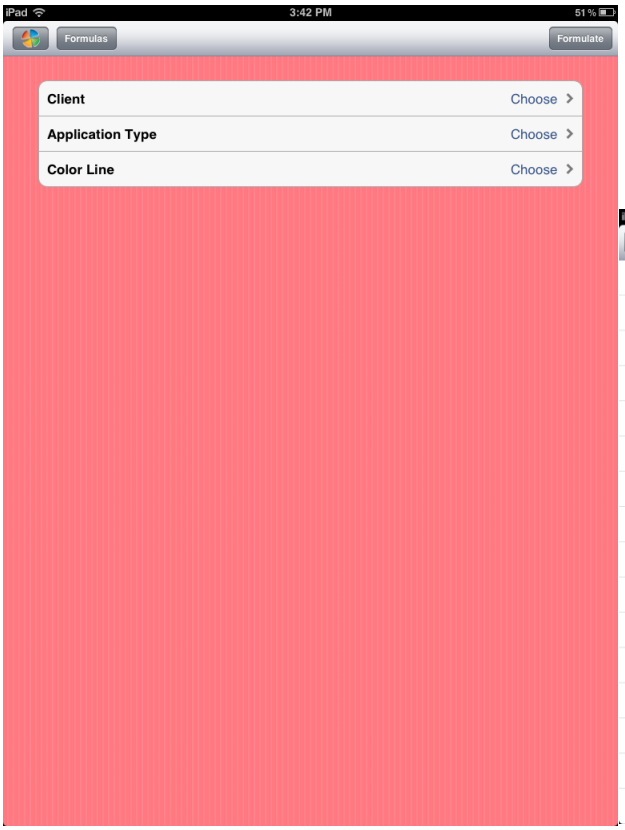
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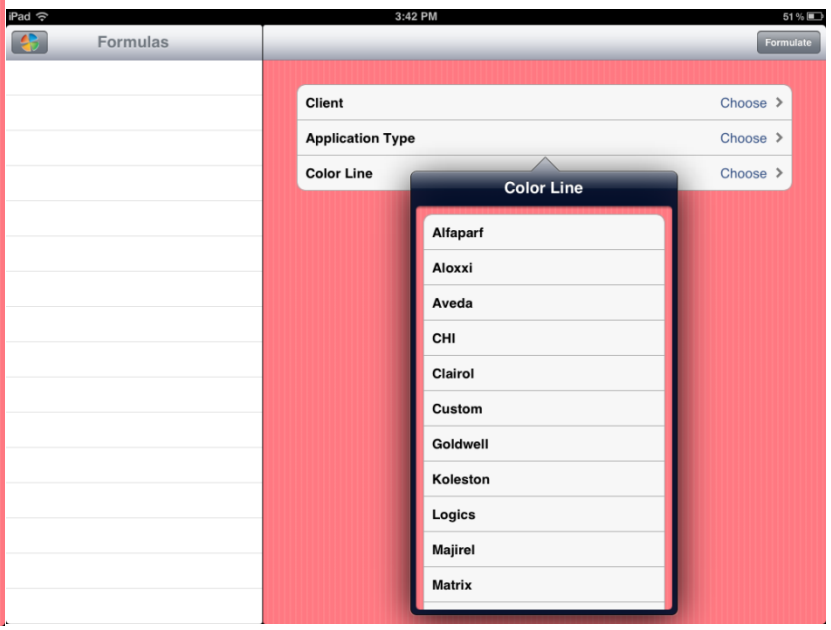
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Formulas
Formulate
Client
Choose
Application Type
Choose
Color Line
Choose
Color Line
Alfaparf
Aloxxi
Aveda
CHI
Clairol
Custom
Goldwell
Koleston
Logics
Majirel
Matrix

CHAPTER 9 - ICLOUD