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## Introduction

The Envision Implementation Guide can be used during the setup process of Envision to guide you through the recommended implementation process. This guide will provide step by step instructions in logical order. It is important to setup the program in this order so that you do not have to continuously go back into different lists and make changes to the items in a list. For example, it is best to setup your Resources and Resource Categories before setting up your services, so that when you are creating your list of services, you will not need to go back through the entire service list to select the correct Resource Category. It is also important to setup your list of services and commission plans before setting up your list of employees so that when you are setting up your list of employees, you will be able to select Qualified Services and assign the correct Commission Plan for each employee.

The steps provided in this guide are the recommended steps for setting up Envision. It is not a requirement to complete the setup in the order provided and not all of the steps are required. For example, you may not have Resources or Packages that need to be entered into the program. These steps can be skipped if they are not necessary. Also, the program is customizable in many ways, making the program unique for each user. The features and capabilities available in the program are determined by the license that you have purchased for the program as well as the preferences and security that you decide to setup within the program. If there is a feature or option mentioned in this guide that you do not see on your screen, this is probably due to the version that was purchased or the options set in your Security Profiles and Program Preferences.

The Checklist on the following page will allow you to check off the items completed as you complete the implementation process.

#### If you need additional help, please call our Technical Support Hotline:

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# Implementation Checklist

Checklist Items	Notes
1. Enter Retail Products / Inventory Departments	
2. Setup Resources / Assign Resources to Categories	
3. Enter Service Items / Inventory Departments	
4. Setup Packages / Series List	
5. Setup Program Security	
6. Setup Program Preferences	
7. Setup Commission Plans	
□ 8. Setup Employee List	
9. Setup Employee Schedules	
10. Transfer Appointments into the Envision Calendar	
11. Transfer Gift Certificates into Envision	
12. Setup Lead Source List	
🗆 13. Physical Count – Count Retail	

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### **1.** Enter Retail Products / Inventory Departments

The Retail Product List allows you to enter the products you sell or use as Back Bar items. It is best to start with this list first because this list will take the most amount of time to setup. This is due to the fact that there are normally a large amount of retail products sold and there is also more information that you will enter for retail products than other items (services, employees, etc.). It is best to enter as much information as possible and to setup the information correctly the first time so that you will not need to go back through and edit your retail list a second time.

- 1. Click on "Inventory" on the Menu Bar at the top of the screen.
- 2. Select "Retail Products" from the drop down menu.

3. Click the **"New"** button at the top of the list. The following screen will open without any information filled in.

Retail Products		Searc	h RDK SATIN	Sort	• 🕕 Exit
Item Id RDK SATINWE	EAR BLOW DRY LOTION	Item #	8151 🔽 Act	tive? Item Type	Retail 👻
Edit Sales History					
Description	Rdk Satinwear Blow Dry Lotion 1oz		Product	t / Service Required again	Save
Barcode	743877052795		in	0 🗘 🛛 days	Save &
Department	RDK - STYLING	*			<u>N</u> ew
Class	BLOW DRY LOTION	*	Last Sale On	8/7/2009 10:36:55	5 AM
Manufacturer	REDKEN LABORATORIES	•	Last Update On	9/9/2009 12:13:4	7 PM 🔶 Next
Vendor	MID-CITY BEAUTY SUPPLY	*			1 Deviews
Vendor SKU	050012481		J		Previous
Web URL	http://www.redken.com/products/st	yling/mild-control	/satinwear-02		
Price       Sale       Retail Commiss         Product Pricing Table       Unit Cost       []         Unit Cost       []       []         Markup %       []       []         Retail Price       []       []         Wholesale Price       []         UoM       []         Size       []         * Retail Price is automatically	ion Loyalty Overrides Accounting Not 1.25 Qty on Hand 100.000 Qty on Order 2.50 Reorder At Order Level 0.0 calculated with a Markup %	5 ¢ 0 ¢ 10 ¢	Non-Taxable Item  Display on POS But No Discounts on th No Price Overrides Back Bar Item (In-+ Reorder Alert Tax when Ordering	nis Item on this Item House Use)	

#### 4. Enter the name of the product in the "Item Id" field. The Item Id must be unique.

#### Item Id Tips:

Size: If you sell different sizes or types of an item, you should also enter the size or type of the item in this field. A separate item record should be created for each size or type.

**Abbreviated Name or Acronym:** You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

Abbreviated Name of Manufacturer: You can also enter an abbreviation of the name of the manufacturer at the beginning of the "Item Id" so that it is easier to search for all items made by that manufacturer. If the name of the manufacturer is at the beginning of the name, all of the items from this manufacturer will be displayed next to each other when searching for an item.

5. Enter a description for the product in the **"Description"** field.

You may enter exactly what you entered in the "Item Id" field or you may enter a longer more descriptive name here. You may also enter the description provided by the vendor or manufacturer. The name you enter here is what will be displayed on the Inventory List and printed on Receipts, Purchase Orders and reports.

6. Scan the barcode of the product in the "Barcode" field if you will be using a barcode scanner.

If you have a barcode scanner connected to your computer, you may scan the UPC code on the product and the code will be entered here automatically. If there is not a barcode associated with the item, you may enter a unique number in this field if you would like to print your own Inventory Labels or you may choose to have the program enter the Item No. of the product in this field.

Set Inventory Barcode to Item No. Setting: If you would like the program to automatically enter the "Item No." into the barcode field, you will need to turn on the option, "Set Inventory Barcode to Item No." under the "General Options" screen of your Program Preferences. To turn this setting on, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. When the Program Preferences window opens, click on the "General Options" button on the left.

7. Select an Inventory "Department" for the product you are entering.

This field is available to further organize your inventory items. The Inventory Department is the category that you would enter this item into. This is valuable when you are printing reports or viewing a large Inventory List and only want to see for example, "Redken Styling Products". You may setup an unlimited amount of departments. These departments will also be used for selecting products at the Sales Register. Product buttons can be used if you will not be using a barcode scanner. A department must be assigned to each product to be able to use product buttons at the Sales Register.

**Creating Inventory Departments:** You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on "Inventory" on the Menu Bar of Envision and select "Inventory Department List" from the menu. You will then be able to create your list of Inventory Departments.

Inventory Department Tip: If you sell products that are made by a manufacturer that you carry a large amount of, you may want to separate your departments into smaller groups so that it is easier to find that item at the Sales Register. For example, a manufacturer like Redken has many different lines. Examples for departments for Redken are RDK - Shampoo, RDK - Conditioner, RDK - Styling, RDK - Treatments and RDK - For Men. By setting the departments up this way, you are able to click on these departments and see a smaller grouping of products.

8. Select a "Class" for the product you are entering (optional).

The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Hairspray", "Cleanser", "Moisturizer", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

**Creating Inventory Class Types:** You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on "Inventory" on the Menu Bar of Envision and select "Inventory Class Types" from the menu. You will then be able to create your list of Inventory Class Types.

9. Select a "Manufacturer" for the product.

The Manufacturer is the company that makes the product. Selecting a Manufacturer for your products will allow you to run reports for specific manufacturers.

**Creating a list of Manufacturers:** You must create a list of Manufacturers before you are able to select a manufacturer here. To add a Manufacturer, click on "Inventory" on the Menu Bar of Envision and select "Manufacturers" from the menu. You will then be able to create your list of Manufacturers.

10. Select a "Vendor" for the product.

The Vendor is the company that you purchase this product from. Select from the Vendor list the Primary Vendor you use to purchase this item. Selecting a Vendor is extremely important for creating Purchase Orders.

**Creating a list of Vendors:** You must create a list of Vendors before you are able to select a Vendor here. To add a Vendor, click on "Inventory" on the Menu Bar of Envision and select "Vendors" from the menu. You will then be able to create your list of Vendors.

#### 11. Enter the "Vendor SKU" (optional).

Enter the "Vendor SKU" that the primary vendor uses for this item. The Vendor SKU is the number that is displayed next this item on the invoice. It is an identification number for your vendor that is used during the ordering process. Entering this information will be useful for creating accurate Purchase Orders because the Vendor SKU will be printed on Purchase Orders.

12. Enter a "Web URL" (optional).

Enter the URL of the website for this item into this field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

13. Enter the number of days in which this product should be purchased again in the **"Product / Service Required Again"** field (optional).

You may run the Product / Service Expiration Report to find out which clients need to purchase products again or come in for a service again. This report can be reached by clicking on "Reports" in the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

14. Enter the **"Unit Cost"** of the product.

This is your cost per unit and the amount that you pay when this product is purchased from your vendor. If you pay \$36 per case of 12, you would enter \$3 for a single product.

15. Edit or enter the "Markup %" if necessary. If you do not wish to enter a Markup %, you may enter only the "Retail Price".

If you enter a "Markup %", the program will automatically calculate the "Retail Price" for you. If your cost changes, the Retail Price will automatically change for you, based on the Markup %. If the Markup % field is left blank, you will be able to enter your own Retail Price. The most common Markup % is 100%. This will double the cost of the item to set the Retail Price.

#### 16. Enter a "Wholesale Price" if necessary.

The Wholesale Price is the amount that a Booth Renter would pay for this particular item. Since a Booth Renter may sell the retail products that you purchase to their clients, you may want to charge them a specific price that is a marked up price of your cost. The Booth Renter can then sell the product to their clients at their own price. In a sense, you will be acting as a vendor to your Booth Renters. When a bill is created for a booth renter, this price will be added to their bill for each time that they sold this product.

17. Enter a Unit of Measure into the **"UOM"** field, such as "Ea" for each or OZ for ounces (optional). You can also enter the **"Size"** below the "UOM". Entering this information is optional, this screen will be the only screen that you will see this information.

18. In the "Qty on Hand" field, enter the quantity you currently have in stock for this item.

If you are entering your list of retail items and are currently selling these products as well, it will not be necessary to enter the "Qty On Hand" because you will need to do a Physical Count of them again, before you Go Live with the program.

19. Leave the **"Qty on Order"** at "0". This number will automatically change when you create a Purchase Order.

This amount is the quantity on order or the amount that you are waiting to receive. You may leave this quantity at a zero amount and the program will automatically enter the quantity on order for you. This field will be updated when you create a Purchase Order that contains this product.

20. Enter the level you wish to reach before you need to reorder this product in the **"Reorder At"** field. This can be used as the minimum or the maximum of this product. A quantity is necessary for the "Autofill" feature of Envision's Purchase Orders.

#### Reorder At - Minimum Quantity

To use the "Reorder At" as the minimum, you will need to enter the minimum quantity that you would like to keep on hand for this product into the "Reorder At" field and enter how many you would like to order when you get down to the minimum quantity into the "Order Level" field. By doing this, the program will automatically reorder the quantity specified, when you have reached the minimum quantity and when you create a Purchase Order in Envision. For example, if your minimum of a product is 3 and you would like to order 3 more when you have reached the minimum, you would enter a quantity of 3 into the "Reorder At" field and a quantity of 3 into the "Order Level" field.

You may leave the Order Level set to zero if you would like to order the difference between the On Hand and Reorder At, however it will only add this product to a Purchase Order when the item has fallen BELOW the Reorder At amount. So, if you set the Reorder At as the minimum, it will not order this item until it has fallen below the minimum. If you decide to do this, you may want to make the minimum quantity slightly larger so that you do not fall below your minimum.

• Reorder At - Maximum Quantity (Most Commonly Used)

To use the "Reorder At" as the maximum, you will need to enter the maximum quantity that you would like to keep on hand for this product into the "Reorder At" field and leave the "Order Level" set to zero. By doing this, the program will automatically reorder the difference between the On Hand and the Reorder At quantities, when a Purchase Order is created in Envision. For example, if your maximum of a product is 5, you would enter a quantity of 5 into the "Reorder At" field and leave the "Order Level" set to zero. If the current "Qty On Hand" amount is 2, the "Reorder At" is 5 and the "Order Level" is zero, the program will automatically order 3 of this item when a Purchase Order is created.

21. In the **"Order Level"** field, enter the quantity of this item you normally reorder if you have to order a specific amount or if you are using the "Reorder At" as the "Minimum Quantity". If you are using the "Reorder At" as the "Maximum Quantity" leave the "Order Level" set to zero if you would like to order the difference between the "Qty on Hand" and the "Reorder At".

22. Edit the Sales Tax options (optional).

Check the "Non-Taxable Item" box if this item does not have sales tax charged on it when sold.

Check the **"Tax when Ordering"** box if you must pay sales tax on this item when you order it from your supplier (vendor). This is usually not checked as you are buying wholesale and re-selling, but this box will usually be checked for Backbar products. Tax is usually applied to Backbar products when purchased from a Vendor because you will not be selling these products to your clients, you will be using them as "In-house" items.

23. Check the "No Discounts on this Item" and "No Price Overrides on this Item" check boxes if necessary (optional).

Check the **"No Price Overrides on this Item"** check box if you do not want to allow any price adjustments for this item during the checkout process. Checking this option will allow you to easily monitor discounts when viewing sales reports.

**Monitoring Discounts:** If you do not want to completely turn off the ability to discount an item but would like to monitor discounts, check only the "No Price Overrides" option. You will be able to easily see discounts when you run sales reports, but you will not be able to see price overrides unless you know the original price of every item.

24. Check the "Back Bar Item (In-House Use)" check box, only if this product is never sold to your clients, but

used to run your business. For example, professional color products, Pine Cleaner, and Toilet Paper.

25. Check the **"Reorder Alert"** check box if you would like to be reminded when the product needs to be reordered (optional).

Check this box to show an alert at the Sales Register when this item is selected for sale. The alert will appear when the inventory of this item falls to or below the "Reorder At" level you set.

26. Click the **"Save"** button on the right to add the item to the list or click the **"Save & New"** button to add the item and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

### 2. Setup Resources / Assign Resources to Categories

Resources are rooms, stations, or equipment that need to be available for appointments that are scheduled. It is best to setup your resources if they are shared between employees and if you need to keep track of the availability of these resources when scheduling appointments.

- 1. Click on "Appointment" on the Menu Bar at the top of this screen.
- 2. Select "Rooms / Equipment Resources" from the drop down menu.

👔 Rooms / Equipment Resource			🔒 <u>S</u> ave 🛛 🗙	Delete 🛛 🐬 Options 👻 🕼 Exit
Caption	1	Show on Appointment Calendar	Color	Type
		Click here to add a new C	aption	
COUPLES MASSAGE 1		<b>V</b>		Sta
COUPLES MASSAGE 2				Sta
FACIAL BED 1		₹		Sta
FACIAL BED 2		▼		Sta
MANICURE STATION 1		<b>V</b>		Sta
MANICURE STATION 2				Sta
MASSAGE ROOM 1		<b>V</b>		Ro
MASSAGE ROOM 2				Ro
MICRODERMABRASION MACHINE		<b>V</b>		Equipm

- 3. Click in the row labeled "Click here to add a new Caption".
- 4. Enter the name of the resource in the "Caption" field.
- 5. Select a color and type for the resource by clicking on the drop down arrow.
- 6. Click the "Save" button to add the resource to the list.
- 7. Click on "Appointment" on the Menu Bar at the top of the screen.
- 8. Select "Assign Resources to Categories" from the drop down menu.

Assign Resources to Categories			🕕 Exit				
🗄 🗋 New 📝 Edit 🛛 😤 Delete 🛛 💿 Eirst 💿 Previous 💿 Next 💿 Last 🛛 🚱 Refresh							
Description	Number Allocated	Updated On	Updated By				
> COUPLES MASSAGE	2	2 1/26/2010 10:50:50 AM	ADMIN				
FACIAL BED	2	2 1/26/2010 10:50:51 AM	ADMIN				
HAIR STATION	C	) 1/26/2010 10:50:52 AM	ADMIN				
MANICURE STATION	2	2 1/26/2010 10:50:54 AM	ADMIN				
MASSAGE BED	2	2 1/26/2010 10:50:55 AM	ADMIN				
MICRODERMABRASION MACHINE	1	l 1/26/2010 10:50:56 AM	ADMIN				
PEDICURE STATION	2	2 1/26/2010 10:50:58 AM	ADMIN				
SPRAY TAN ROOM	1	L 1/7/2010 5:19:24 PM	ADMIN				
TANNING BED	5	5 1/26/2010 10:51:00 AM	ADMIN				
TREATMENT ROOM	1	L 1/26/2010 10:51:02 AM	ADMIN				
WAXING STATION	2	2 1/7/2010 5:19:24 PM	ADMIN				

9. Click on the "New" button on the Tool Bar at the top of this list to create a new Resource Category.

This screen allows you to create Resource Categories and then assign available resources to the category you are creating.

Resource Category		IANICU	RE STATION			]	Save
Select an available resource(s) and assign	them for use i	in this	category.				Mew New
Available Resource	<b>^</b>	1	Assigned Resource	Order			X <u>C</u> ancel
COUPLES MASSAGE 1		6	MANICURE STATION 2		1	0	Next
COUPLES MASSAGE 2			MANICURE STATION 1		2	•	
FACIAL BED 1		6					🔷 Previou
FACIAL BED 2							
MASSAGE ROOM 1							
MASSAGE ROOM 2					_		
MICRODERMABRASION MACHINE					=		
MULTI SERVICE ROOM 2	=						
MULTI SERVICE ROOM 3							
MULTI SERVICE ROOM 4							
MULTI SERVICE ROOM1							
PEDICURE STATION 1							
PEDICURE STATION 2							
SPRAY TAN ROOM							
TANNING BED 1							
TANNING BED 2							
TANNING BED 3							
TANNING BED 4							
TANNING BED 5							

10. Enter a new Category in the "Resource Category" field at the top of this screen.

11. Move the resources for this category from the available list to the assigned list with the right arrow button in between these two lists.

For example, in the image above, the resource category is "Manicure Station". The "Manicure Station 1" and "Manicure Station 2" resources have been moved from the "Available" list to the "Assigned" list. Whenever a service is selected in the Appointment Calendar that requires the "Manicure Station" Category, the program will check if either the "Manicure Station 1" or "Manicure Station 2" resource is available.

12. Click the "Save" button after assigning resources to the category to add the category to the list.

### 3. Enter Service Items / Inventory Departments

It will be necessary to setup your list of Services so that you are able to setup which services each Employee is qualified to perform and so that you can schedule appointments and create sales transactions for the services provided.

- 1. Click on "Inventory" on the Menu Bar at the top of the screen.
- 2. Select "Services" from the drop down menu.

3. Click the **"New"** button to add a new service to the list or click the "Edit" button to edit a service in the list. The following screen will open without any information filled in.

Services		ch ALL Sort		• 🕼 Exit
Item Id ALL OVER COLOR	Item #	74 🔽 Active?	Item Type	Service -
Edit Price / Time Exceptions Service Page	kage Professional Consumables Sales Hist	tory		
Description All Over Co	or	Product / Servi	ce Required again	Save
Barcode		in 42	🗘 days	Save &
Department HAIR - CHE	MICAL +	·		<u>Id</u> ew
Class COLOR	•	Last Sale On	9/1/2009 12:26:15 PM	1 X Cancel
1st Resource	•	Last Update On	9/4/2009 1:51:36 PM	Next
Service Type	HAIR - CHEMICAL 🗸	]		Previous     Update
	Commission Loyalty Overrides Accountin			Service Types
Service Pricing Table		<ul> <li>Non-Taxable Item</li> <li>Display on POS Button Par</li> </ul>	el	
Level 1 70.00	Level 6 95.00	No Discounts on this Item		
Level 2 75.00	Level 7 65.00	No Price Overrides on this	Item	
Level 3 80.00	Level 8 0.00			
Level 5 90.00	Level 10 0.00			
				1

4. Enter the name of the service in the "Item Id" field.

You may abbreviate the name in this field, however if you choose to abbreviate the name, make sure that it is a name that everyone who will be using the Appointment Calendar and Sales Register screen will be able to remember when searching for the item. The Item Id must be unique.

Tips:

**Types:** If you offer different types of a service, you should also enter the type of the service in this field. A separate item record should be created for each type of service. For example, if you offer massage services, it would be best to enter a separate item for each type of massage for pricing, scheduling, and reporting purposes.

**Abbreviated Name or Acronym:** You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

5. Enter a description in the "Description" field. The name you enter here is what will be displayed on your

product buttons in the Sales Register and printed on receipts and reports.

6. It is not necessary to enter a **"Barcode"** for services, however you may enter a number if you would like to print a sheet of barcodes for your services.

7. Select or add an Inventory "Department" for the service you are entering.

This field is available to further organize your inventory items. The Inventory Department is the category that you would enter this item into. This is valuable when you are printing reports or viewing a large Inventory List and only want to see for example, "Chemical Services". These departments will also be used for selecting services at the Sales Register. Product buttons can be used to select or add a service to a ticket. Clicking on a button for the service will be much easier than searching through a list of services. A department must be assigned to each service to be able to use product buttons at the Sales Register.

**Creating Inventory Departments:** You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on "Inventory" on the Menu Bar of Envision and select "Inventory Department List" from the menu. You will then be able to create your list of Inventory Departments.

**Tip:** If you provide different types of services, you may want to separate your departments into smaller groups so that it is easier to find that service at the Sales Register. For example, if you provide Hair Services, Nail Services, Massage Services and Esthetic Services, it would be best to create a separate department for each type of service. Examples for departments for services are Service - Hair or Hair Services, Service - Chemical or Chemical Services, Service - Nails or Nail Services, Service - Massage or Massage Services and Service - Esthetic or Esthetic Services. By setting the departments up this way, you are able to click on these departments and see a smaller grouping of services.

8. Select or add an Inventory "Class" for the service you are entering (optional).

The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Color", "Highlights", "Perm", "Straightener", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

Creating Inventory Class Types: You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on "Inventory" on the Menu Bar of Envision and select "Inventory Class Types" from the menu. You will then be able to create your list of Inventory Class Types.

9. Select the required resource for the service you are adding in the "1st Resource" field (optional).

Select the type of resource (room, station, or equipment) that this service requires. Please refer to the "Resource Setup" section of this guide for more information on setting up your resources.

10. Select the "Service Type" for the service you are adding.

The "Service Type" is used in Sales Analysis Reports. The "Service Type" is a category separate from the Inventory Department but can be setup exactly the same as the Inventory Department if you wish.

11. In the **"Product / Service Required Again"** field, enter the number of days in which this service should be performed again (optional).

You may run the Product / Service Expiration Report to find out which clients need to purchase products again or come in for a service again. This report can be reached by clicking on "Reports" on the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

12. Enter a "Web URL" (optional).

Enter the URL of the website for this item into this field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

13. Enter the different Levels of prices that you use for your services. If you only have one price for your

services, enter this price in the "Level 1" field.

Enter the price you charge for a service into the "Level 1" field if you do not have different levels of pricing based on experience. The ten levels provided are only used for businesses that have different levels of pricing based on experience. The purpose is to pay more for a service performed by a more experienced employee. Enter how much will be charged for a service in each price level that your employees will be set to.

For example, if you have a stylist with 10 years experience you may set them to Level 5 in the Employee screens. You may also have a stylist who is very new to the trade and set them to Level 1. Now when you enter "Hair Styling" into inventory as a "Service Item", you enter \$25 in "Level 1", \$30 in "Level 2", \$35 in "Level 3", \$40 in "Level 4", and \$50 in "Level 5". When the client gets their hair styled, how much they are charged at the POS will depend upon which Employee is selected (an employee must be selected for every sale in the POS).

**Employee Service Price Level Setting:** To set the Service Price Level for each employee, click on "Employee" on the Menu Bar of Envision and select the "Employee List" from the menu. Double click on top of an employee's name and click on the "Other" tab. You will find a section in the middle of the screen labeled "Service Price Level". Select the appropriate price level for each employee.

14. Check the "Non-Taxable Item" check box if the Inventory item is non-taxable. Some states charge sales tax on all services or some services. If you will not be checking the "taxable" check box for service items in your Program Preferences on the "Tax Options" screen, it will not be necessary to check this box.

15. Check the "No Discounts on this Item" and "No Price Overrides on this Item" check boxes if necessary.

Check the "No Price Overrides on this Item" check box if you do not want to allow any price adjustments for this item during the checkout process. Checking this option will allow you to easily monitor discounts when viewing sales reports.

Monitoring Discounts: If you do not want to completely turn off the ability to discount an item but would like to monitor discounts, check only the "No Price Overrides" option. You will be able to easily see discounts when you run sales reports, but you will not be able to see price overrides unless you know the original price of every item.

16. Click on the "Scheduling Options" tab to enter the amount of time it takes to complete the service.

Price Sale Scheduling Options Service Commission Loyalty O	verrides Accounting Notes
Edit Service Time Options (HH:MM)         Initial / Setup       Process       Complete         00:30 ‡       00:45 ‡       00:30 ‡	Enable Service for Online Booking     Require Resource Selection     Skin Test Required
	Formula Required
Starting Color on Calendar	••••

The three items in this area are the default times that you will setup for this service. This is the time that will be used if you do not have specific times setup for each employee under their Qualified Services list in the Employee List.

- Initial time for Service: All service items need a time filled in to this field. It is the best estimate of the time it takes to perform the service. Use 15-minute increments only. For example, 1 hour would be entered as 01:00, or 30 minutes would be entered as 00:30. For most service items this is the only time needed. For a chemical service, this would be the amount of time that it takes to apply the color or chemical to the hair.
- **Process:** Enter a time (once again 15 minute increments only) here if a delay is required during this service. For example, this would be necessary you apply color and must wait 30 minutes for processing time before you wash, rinse, and style. Entering a time here will allow you to schedule another service with a different client during this time. This allows you to maximize the use of the service provider's time. If you enter a time here, you must enter a "Completion Time".

• **Completion Time:** Enter a time here only if you entered a "Process" time above. This is the time it takes to finish the service after the delay.

17. Click on the "Service Commission" tab if you need to override the commission for this particular service. Please keep in mind that this is only an override, this is not where you will be setting up commission. Check the "Commission Override" check box and enter a dollar amount in the "Commission Override" field if you would like your service providers to receive a specific dollar amount instead of their commission percentage for the service (optional).

Price Sale Scheduling Options Service Commission Loyalty Overrides Accounting Notes								
Overhead Costs	Commission Override Amount	0.00						
Use Commission Plan Defaults	Fixed Overhead Cost	2.25						
Subtract Overhead BEFORE commissions	Fixed Labor Cost	0.00						
© Subtract Overhead AFTER commissions	Fixed Back Bar Cost	5.00						
Labor Costs	New Account Deduction	1.00						
Use Commission Plan Defaults	Additional Sales Incentive	0.00						
Subtract Labor BEFORE commissions	Incentive Starts On							
Subtract Labor AFTER commissions								
Prepay Commission on Series	Incentive Ends On  Report Pkg Sales under Service							

18. Enter any costs associated with this service. The **"Fixed Overhead Cost"**, **"Fixed Labor Cost"** and **"New Account Deduction"** are deductions from the employee's pay. If you wish to retain a small amount of money from the employee's commission each time this item is sold, check these boxes. The "New Account Deduction" is a dollar amount to deduct from an employee's commission when they sell this service to a new client. This is used to offset the advertising costs associated with obtaining new clients. The "Fixed Overhead Cost" and "Fixed Labor Cost" fields are associated with the "Overhead Cost" and "Labor Cost" choices on the left. The **"Fixed Backbar Cost"** is the amount of money that this service costs the business. This will affect the "Cost" and "Profit" figures on sales reports.

19. Select the Overhead and Labor options for the service if these options will be different than what is set in your commission plans.

- Select "Use Commission Plan Defaults" if you would like to use the settings in the commission plan setup for your employees.
- Select "Subtract Overhead / Labor before commissions" to subtract the dollar amount from the total sales
  of this item before calculating the
  commission.
- Select "Subtract Overhead / Labor after commissions" to take the dollar amount directly from the calculated commissions.

20. Click the **"Save"** button on the right to add the item to the list or click the **"Save & New"** button to add the item and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

### 4. Setup Packages / Series List

Packages will allow you to combine items (services and/or retail) so that you may sell these items together at a discounted price. If the package is discounted, your clients will be more enticed to purchase the items that are included in the package because they are being sold at a discounted rate. When a package is sold, this is guaranteed revenue for your business and also allows you the opportunity to upsell items to your clients when they come in for their package or when they come in for one of the items in a series package. A Package can contain either physical products, Services, or Tanning. A package can be a combination of different types of services or you can make a series package. A series package is a prepaid package of the same service in multiple quantities. Selling a prepaid series package also guarantees your business revenue, allows you the opportunity to upsell and also increases your business' retention.

Here are some examples or each:

- Day Package: A 1 Hour Massage, Facial, Manicure and Pedicure can be combined for a day package or Mother's Day Special.
- Series (Prepaid): Offer a package of Pedicures or Massages for a prepaid price that is discounted from the individual prices. Envision will track the customers' use of these packages. Each time the client visits for one of their prepaid items, the item will be deducted from their available prepaid items.
- 1. Click on "Inventory" on the Menu Bar at the top of the screen.
- 2. Select "Package / Series" from the drop down menu.

3. Click the **"New"** button to add a new Package / Series to the list or click the "Edit" button to edit a Package / Series in the list. The following screen will open without any information filled in.

Package/Series		Search	Sort	t	• 🚯 Exit
Item Id DAY AT THE	SPA	Item #	4845 👿 Active?	Item Type	Package 🚽
Edit Package Details Sales	History				
Description	Day At The Spa				🔒 <u>S</u> ave
Barcode	4845				Save &
Department	PACKAGE	<b>•</b>			<u>N</u> ew
Class		* Last	Sale On	8/7/2009 11:08:14 AI	M Cancel
		Last	Update On	8/27/2009 4:57:24 Pf	M 🕨 Next
					Previous
Web URL					
Price Sale Loyalty Overri	des Accounting Notes				
Package Pricing Table					1
Value	270.00 🗑 Series (Prepaid Items)		/ on POS Button Par	nel	
Retail Price	254.41 👿 Set Pkg as a Service		counts on this Item ce Overrides on this	Item	
% Discount	5.80				
Package Expires after	0 🗘 (O to never expire	.)			
	Expire Type Days				
	© Weeks				
	Months				
					_

4. Enter the name of the package into the **"Item Id"** field. You may abbreviate the name in this field, however if you choose to abbreviate the name, make sure that it is a name that everyone who will be using the Appointment Calendar and Sales Register screen will be able to remember when searching for the item. The Item Id must be unique.

#### Item Id Tips:

**Types:** If you sell different types of a package, you should also enter the type of the package in this field. For example, if you offer different types of pedicures and you are creating a package of pedicures, it would be best to enter the type of pedicure in the Item Id field so that separate items are created for the different types of pedicure packages. This is necessary for pricing, scheduling, and reporting purposes.

**Abbreviated Name or Acronym:** You may also abbreviate the name of the product in this field. If you choose to abbreviate the name or enter an acronym, make sure that it is a name or acronym that everyone who will be using the Appointment Calendar and Point Of Sale screen will be able to remember when searching for the item.

5. Enter the name of the package into the "**Description**" field. You may enter the same name that was entered in the "Item Id" field, or you can enter a longer more descriptive name here. The Description will be displayed at the Sales Register and will be printed on your receipts.

6. It is not necessary to enter a barcode number for package items, however you may enter your own unique barcode number into the **"Barcode"** field or you may leave the default that Envision placed here if you have chosen to have the program enter the Item No. of the item in this field. This is the option"Set Inventory Barcode to Item No." under the "Options" tab on the "Program Preferences" screen.

Set Inventory Barcode to Item No. Setting: You will need to turn on the option, "Set Inventory Barcode to Item No." under the "General Options" screen of your Program Preferences.

Path to Setting: To turn this setting on, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. When the Program Preferences window opens, click on the "General Options" button on the left.

7. Select a **"Department"** from your list of Inventory Departments. It is best to create a separate department for your packages so that they are easier to locate at the Sales Register. If you are selling a Series (Prepaid) package and the name of the package is similar to the name of the service, it will be difficult to differentiate between the single service item and the package. By placing the package in a separate department, this problem will not occur.

The Departments that you setup are also the departments that create the department tabs in the Sales Register. In the Sales Register you are able to turn on Product Buttons (displayed below). Because you will not be using a barcode to select these packages, these product buttons will be your main method for adding a package to a ticket in the Sales Register. These product buttons are all placed into categories, which are the Inventory Departments. When an item is assigned to an Inventory Department and you are displaying your product buttons in the Sales Register, a button will appear for that item when you click on the correct Department Tab.



**Creating Inventory Departments:** You must create a list of Inventory Departments before you are able to select a department here. To add an Inventory Department, click on **"Inventory"** on the Menu Bar of Envision and select **"Inventory Department List"** from the menu. You will then be able to create your list of Inventory Departments.

8. Select a **"Class"** from your list of Inventory Class Types (optional). The class is a subcategory of the department. The Class, along with "Department", can help you organize your inventory into logical groups. Some examples of Class might be, "Salon", "Spa", "Massage", etc. Using the Class field will allow you to view a smaller inventory grouping when running sales reports. These classes can be used to run the "Sales by Inventory Department - Sales by Department / Class" report.

Creating Inventory Class Types: You must create a list of Inventory Classes before you are able to select a class here. To add an Inventory Class, click on "Inventory" on the Menu Bar of Envision and select "Inventory Class Types" from the menu. You will then be able to create your list of Inventory Class Types.

Path to Report: Click on "Reports" on the Menu Bar of Envision, select "Sales by Inventory Department" and then select "Sales by Department / Class" from the menu that appears to the right.

#### 9. Enter a "Web URL" (optional).

Enter the URL of the website for this item into the "Web URL" field. You will be able to easily access the web page specified by right clicking on top of the item in the Sales Register and selecting the "Web Link" option.

#### 10. Check the "Series (Prepaid Items)" check box if necessary.

For having a short name and only one check box, this is one of the most powerful features of the program. It tells the program that this item is packaged by "Count". If you wish to create a pre-paid package that must be used within a time period, you would not check this box. You would select the number of weeks in the "Package Expires After" field.

By checking this box, you are telling the program this package will be used up when the client checks out at the Sales Register, the number of times equal to the "Qty" you set on the "Package Details" screen. This also allows you to track the usage of the items the client has prepaid for. For example, if you wish to create a prepaid package of 10 Swedish Massages, you would check this box on the "Package Details" screen and select the inventory item Swedish Massage. Then enter a quantity ("Qty") of 10. When a client gets a Swedish Massage and checks out at the Sales Register, you would offer to sell them the package of 10, explaining that this is a savings over the individual purchases. If the client decides to purchase the package, you would select the package from inventory, select the client from your client listing (add them "On the Fly" if they're not already entered), and complete the sale. The package count of 10 is assigned to this customer and they are charged for the total package (prepaid). You will then need to create a separate sales transaction for the Swedish Massage they used that day. When their Client Id is selected along with the Swedish Massage, the Extended Price of the service will be "\$0.00" because they paid for the service when they purchased the package in the first sales transaction. The count on their prepaid Swedish Massages will be reduced to 9. The next time they come in for this service, and they are checked out in the Sales Register, they will not be charged but their count will be reduced to 8. Envision will not charge the client at the Sales Register for this item until all the items in their package have been used.

11. Check the "Set Pkg as a Service" check box if you would like to report your Packages as a Service Type item.

12. Use the **"Package Expires After/Expire Type"** fields if you would like the package to expire after a certain amount of days, weeks or months.

You may set an expiration to this package if you would like to limit the amount of time that a client has to use this package. Select "Days", "Weeks", or "Months" in the "Expire Type" section for the amount you enter in the "Package Expires After" field.

13. Click the **"Package Details"** tab at the top of the screen to select the items and quantities of the items that will be included in the package.

🎽 🛛 Pac						arch		Sort			•	🕩 Exit
em Id	DAY AT THE SPA				Item #		4845 👿 Acti	/e? Item	Туре		Packag	e -
dit Pack	age Details Sales History	/										
Seq #	Item Id		Qty	Description			Retail	Price	Exter	nd		Save
					add a new ro							Save &
	1 HOUR SWEDISH M	ASSAGE 🗾 👻			WEDISH MAS	SAGE	85.00			76.50	- P	<u>N</u> ew
	2 FACIAL			1 Facial			85.00			76.50		Cancel
	3 LUNCH			1 Lunch			15.00			13,50		
	4 ULTIMATE SPA MAN				E SPA MANICU		45.00			40.50		Next
	5 ULTIMATE SPA PEDI	CURE		1 ULTIMATE	E SPA PEDICU	RE	65.00	0 58.50	10	58.50		
											•	
	₩t,∀x⊙ Item	Assign a p	price or	discount t	to entire pag	kage	Value			295.	00	

14. Click in the field labeled "Click here to add a new row" or click the "Add Item" button to add an item to this list. All the items that make up the "Package" you are putting together can be selected here. Click the drop down arrow that appears to open a drop down menu of your inventory items. After selecting the first item, enter how many of that item will be included in this package under the "Qty" column. You may also set the order that these items should be scheduled in under the column labeled "Seq #". You will not need to set the "Seq #" if the items you will be selecting are selected in the correct order.

15. Enter a "Price" or "%Disc" in the "Assign a price or discount to entire package" section at the bottom of this screen.

The "Price" field and "% Discount" fields at the bottom of this screen work in conjunction with the large **"Set a Discount % or Package Price"** button. You may enter a flat price for the package into the "Price" field. When you click the "Set Discount % or Package Price" button, the program will automatically calculate the percent of discount, individual item "Package" prices and the "% Discount" amounts. This greatly simplifies the task of pricing packages. If you choose to enter a "% Disc" instead of a flat package "Price", the same automatic events will occur.

16. Click the "Set Discount % or Package Price" button to set the price.

17. Click the **"Save"** button on the right to add the package to the list or click the **"Save & New"** button to add the package and open a blank entry screen. The **"Save & New"** button can be used when you are entering one item after another.

## 5. Setup Program Security

The following instructions will walk you through the three different parts of setting up your program security. You will first need to setup your security profiles, then you will need to assign passwords and security levels to each employee in your Employee List and finally you will be able to enable the program security.

- 1. Click on "Company" on the Menu Bar at the top of Envision.
- 2. Select "Setup Security Profiles" from the drop down menu.
- 3. Click on the "New" button on the Tool Bar at the top of this list to create a new Security Profile.

Setup Security Profiles Menu Options Other Options				C Exit
Security Profile Description Check or Uncheck Menu Access:   Bestore from Floppy or Local Drive Use DEMO Data  Utilities: Fole That Directory Utilities: Sole Access to Database Utilities: Sole Access to Database Utilities: Reset Database Editor Utilities: Reset Clent Prepaid History File Utilities: Reset Calendar Links Utilities: Reset Automatic Confirmation Flags Utilities: Purge Expired Appointments Utilities: Change Calendar Time Slot Values Utilities: Change Calendar Links Utilities: Change Calendar Links Utilities: Change Calendar Links Utilities: Purge Expired Appointments Utilities: Change Calendar Links Utilities: Lange Calenda	FRONT DESK The title of the menu options screen that you are currently editing will be displayed here	File Menu The list of menu options you to give access to in selections in the prograu Place a check mark next wish members of this gr access to. Remove the to any item you wish to The Next/Previous butt this screen allow you to eleven main menu group program. After you have finished to the main menu. Proc Option's page.	dividual menu m. : to every item you oup to have check mark next remove access to. ons at the bottom of scroll through the sings in the selecting the rights	Save & New Cancel Next
Utilities: Edit AOS.INI File	Each menu option screen is numbered. Use the number displayed here to keep track of which menu option screen you are currently editing and to keep track of how many screens you have left to edit	Menu 1/11	screen of menu optic button, you will see t to the next menu op menu options will a the screen. Each scr is displayed above	Itton to go to the next ons. When you click this he menu options change tions and the title of the so change at the top of een is numbered, which the "Previous" button.

4. Enter a name for the Security Profile you are creating, at the top of this screen.

- 5. Under the "Menu Options" tab, check and uncheck the items that this profile will have access to.
- 6. Click the "Next" button in the lower right hand corner to open the next screen of Menu Options.
- 7. When you have finished going through all of the Menu Option screens, click on the "Other Options" tab.
- 8. Place a check mark next to every item you wish members of this group to have access to.

9. Click the **"Save"** button to save the new security profile you have created or **"Save & New"** to create additional security profiles.

10. After creating security profiles for the different levels of access that you would like to use, you will need to assign passwords and security levels to each employee. Click on "Employee" on the Menu Bar of Envision and select the "Employee List" from the menu.

11. Double click on top of an employee's name to open their record and click on the "Other" tab.

Manager Employee List	
Address Other Certifications Custor	m Notes Messages Qualified Serv
Employee Type	
Birthdate	<b>•</b>
Date Started	4/6/2005 🔹
Terminated On	•
Set New Password	***
Security Level	FRONT DESK -

12. Enter a password in the "Set New Password" field and select a "Security Level" from the drop down menu.

13. Click the "Next" button on the right to go to the next employee's record.

14. After setting a Password and selecting a Security Level for each employee, you will then need to enable the program security. Click on **"Company"** on the Menu Bar of Envision and select **"Setup Program Preferences"** from the menu.

15. Click on the "Security Options" button on the left.

Activate and Enable Default Security Options	
✓ Enable Program Security	
Default Security Profile	SERVICE PROVIDERS
belaut becanty i folie	SERVICE INCOLLERS
Employee Timecard / Login	Login via Employee Id and Password 👻
Inactivity Logout (Seconds, 0 = Disable)	0 ‡
Forced Password Change (Days, 0 = Disable)	0 ‡

16. Check the **"Enable Program Security"** checkbox to turn on the security. You will not be able to check this box until every employee in your Employee List has a Password and Security Level set to their employee record.

17. Select a "Default Security Profile". This should be the profile with the least access.

18. Select the method that you would like your employees to use to login to the program from the **"Employee Timecard / Login"** menu. They can login by entering their Employee Id and Password, with an Employee Id Card or both.

19. If you would like the system to automatically Logout if the system has been inactive for certain amount of seconds, enter how many seconds in the "Inactivity Logout" field.

20. If you would like your employees to be prompted / forced to enter a new password after a certain amount of days, enter how many days in the **"Forced Password Change"** field.

21. Click the "Save" button in the upper right hand corner to save these settings.

### 6. Setup Program Preferences

These setup screens should be completed before you start using the program. They set the operation of nearly every screen in the program. The preferences explained here are only the preferences most commonly used. For more information on all of the preferences, please refer to the Envision Users' Guide or Help File. These preferences will depend on how you run your business. All of the preferences available in your Program Preferences are optional. The settings suggested in this guide are only suggestions. It is completely up to you if you would like to turn these options on or off.

- 1. Click on "Company" on the Menu Bar of Envision
- 2. Select "Setup Program Preferences" from the menu.

3.	On the	"Company	Options"	screen,	enter your	Company Information.

Setup System	Preferences	Save
	Company Options	
Options 🌣	Location Id	MAIN
	Business Name	ENNOVIEW
Company	Address	123 Sunny St.
	City	Sunnyville
Hours of Operation	State / County	FL
	Postal Code	32XXX
<b>*</b>	Fax	
Taxes	Tax ID 1	
<b>-</b>	Tax ID 2	
Credit Card / ACH Options	Phone	555-555-1212
S 🖓 👘	Email Address	
General Options	Country	
		Last Backup
Define Service Types		2/18/2010
		Last File Maintenance
Calendar Options		2/16/2010

4. Click on the "Hours of Operation" button on the left.

Setup Program Preferences	s			x
Setup System	Preferences			Save
A	Hours of Operation			
Options A			Store Opens at	Store Closes at
	Sunday	🗖 Open	08:00 AM 🛟	08:00 PM 🛟
Company	Monday	🔽 Open	09:00 AM 🗘	06:00 PM 🗘
	Tuesday	💟 Open	09:00 AM 🗘	10:00 PM 💲
Hours of Operation	Wednesday	Open	09:00 AM 🗘	08:00 PM 🗘
	Thursday	🔽 Open	09:00 AM 🗘	08:00 PM 🗘
Taxes	Friday	🔽 Open	09:00 AM 🛟	08:00 PM 🗘
	Saturday	🗖 Open	08:00 AM 🗘	08:00 PM 🗘
<b>-</b>				
Credit Card / ACH Options				

5. Check the days that your store will be open in the check boxes to the right of the weekdays that you will be open. Enter the **"Store Opens At"** and **"Store Closes At"** hours in the fields to the right of each weekday.

Scheduling Outside of Your Store Hours: If you would like to schedule appointments before or after your store hours, enter additional hours in the "Store Opens At" and "Store Closes At" fields. For example, if you close at 7 PM but still allow appointments to be scheduled at 7:30 PM, you will need to open your hours to 8 PM or 9 PM so that you are able to see those time slots in the calendar. If the hours are set to close at 7 PM, you will not be able to see anything past 7 PM.

6. Click on the "Taxes" button on the left.

Setup Program Preferer	ices					×	
📑 Setup Syster	n P	references				Save	
	A Tax Options						
Options 🕆		Select Appropriate Region (Presets Tax Options)					
~		🖲 US Sales Tax					
		🔘 Canadian (GST / PST or H	ST)				
Company		🔘 Canadian (Quebec / Prince	e Edward GST/QST)				
		© European VAT					
Hours of Operation		🔘 Australian GST					
		New Zealand GST					
Taxes		Setup Rates					
_ <b>7</b>				Rate 1	Rate 2	Rate 3	
Credit Card / ACH Options		Retail Products	🔽 Taxable	6.500	0.000	0.000	
		Service Items	🕅 Taxable	10.000	0.000	0.000	
		Tanning Products	🕅 Taxable	10.000	0.000	0.000	
General Options		Memberships	🔳 Taxable	10.000	0.000	0.000	
		Gift Certificates	🔳 Taxable	0.000	0.000	0.000	
Define Service Types		Tax Included in Product P	rice				
		Compound Tax Rate 2 (Include Ticket Total + Tax 1)					
Calendar Options		🕅 Compound Tax Rate 3 (In	clude Ticket Total + Tax 2)				
Sec. 1		Setup Tax Options		_	_		
Point of Sale Options 1		Remove Tax Line on Printed Receipt					
<b>\$</b>		Add Tax to Gift Certificates					
Point of Sale Options 2		Tax Name					

7. Select the appropriate Tax Region and setup your tax rates by checking which items are taxable and entering the correct tax rates in the fields to the right. The tax rate should be entered as a whole number. For example, if your tax rate is 7%, this should be entered as "7.000". The "Rate 2" and "Rate 3" fields are for city or county taxes. Entering these types of taxes as separate tax rates will allow you to keep separate records of each type of tax so that you can run reports with these tax rates separated into their own separate totals.

8. Click the "Credit Card / ACH Options" button on the left (optional).

Setup Program Preferen	nces X		
📑 Setup System	m Preferences Save		
	Credit Card Options		
Options 🌣	Credit Card Processor Selection		
	Credit Card Software Terminal (Credit & Debit Transactions)		
Company	CIVerify (Credit Transactions Only)		
	O UK Only - Yes Pay		
Hours of Operation			
	Preauthorize Credit Card Receipts to Allow for Tip Entry (**May cause higher Processing Fees**)		
Taxes	Credit Card Terminal Software Setup ICVerify Credit Card Processing Information		
5	Please call 1-407-253-0913 for help setting up a merchant account.		
Credit Card / ACH Options	PNS Merchant No. (MID)		
) 💓 🔰	Client No. (CID)		
General Options	Terminal No. (TID)		
	User Name		
Define Service Types	Password		
Calendar Options	ACT University (Decouved Information		
	ACH Username / Password Information		
Point of Sale Options 1	User Name		
	Password		
Point of Sale Options 2	Please call 1-407-253-0913 to setup an ACH account for membership billing.		

20

9. If you have purchased Envision's Credit Card Processing Module or if you are using the ACH Billing Module, you will need to setup your account information here. Fill in the information provided to you for your merchant account.

10. Click on the "General Options" button on the left.

Setup Program Prefere	nces	x
📑 Setup Systen	n Preferences	Save
	General Options	
Options 🌣	Mgr Override Password	****
	Default Inventory Markup	100
Company	Default Employee Markup	20
	Inventory Cost Method	LIFO (Last Entered Cost) 👻
	Skin Test Check in Days	90 ‡
Hours of Operation	Tan Warning in Hours	24 ‡
	Set Inventory Barcode to Item No.	
Taxes	Disable Weekly Backup & File Maintenance Checks	
<b>_</b>	Leave Report Option Window Open after Preview/Print	
Credit Card / ACH Options	🕅 Disable Initial Start-Up Processing	
Credit Card / ACH Options	Enable Automatic Membership Renewal Processing	
	Auto Open Calendar     Auto Open Walk In Queue	Vales Regiser
General Options	Print Schedule when Loggin	g In
	Force the following items to be entered when adding a new clier	nt
Define Service Types	▼ First / Last Name	New Client ID Format
	☑ Address	Last Name (Space) First Name 👻
	Email Address	
Calendar Options	Home Phone     Vicead Source	V Mobile Phone
Point of Sale Options 1	Default Client Address Information	
	City	
Deint of Colo Online O	State / County	
Point of Sale Options 2	Postal Code	
<b>1</b>	Phone Prefix	
Loyalty Programs		
Security Options	<b>T</b>	

11. Enter the "Mgr Override Password" in the first field at the top.

Manager Override		×
🔒 Enter Pass	sword	
Password		
	🗸 ОК	🗙 Cancel

Whenever the program detects that a manager approval for an action is required, you will be asked for this password. As the password is entered it will be shown as asterisks to prevent anyone from viewing it. You will be asked for this password when you use any of the following features:

- Recall Ticket
- Void Ticket
- Remove Ticket
- No Sale
- Pay Out
- Override Time Clock (Override Button on the Time Clock screen)

• Discount Button when discounts are turned off

12. Enter the **"Default Inventory Markup"** in the field provided. The Inventory Markup is a percentage that will be filled in automatically for each new retail item added to your retail list. Remember, it is only a default and can be changed for particular inventory items as you enter them. Use whole numbers, for example "100" for 100%. 100% is the most common setting.

13. Enter the **"Default Employee Markup"** (optional). If you markup your products by a small percentage when products are sold to your employees, enter a number that is a percent of markup that will be used as the default for Employee purchases. Setting a percentage here will automatically set the "Employee Price" from retail products, based on the cost of the product.

14. Select the "New Client ID Format". This selection is one of the most important settings in your Program Preferences. This option will set the format that you will use to search for your clients. When adding a Client outside of your Client List, the Client Id can automatically be entered for you. The system is defaulted to enter the first initial and last name of the client, however we strongly recommend setting this New Client Id Format to Last Name (Space) First Name, First Name (Space) Last Name, First Name / Last Name or Last Name / First Name. Selecting clients will be much easier with any of these Client Id formats and you will not come across a situation where you will need to enter a number in a Client Id because more than one client has the same first initial and last name.

Add New Client				
🕵 Enter Client Information				
First Name	Sarah	Middle Initial		
Last Name	Jones			
Client Id	JONES SARAH	* must be unique		

15. Click on the "Calendar Options" button on the left.

Setup Program Preferen	ices	x	
Setup System	) Preferences	Save	
	Appointment Options		
Options 🌣	Show Popup Window of Client Notes at	POS / Calendar	
	V Disregard Employee Work Schedule and S	Show ALL timeslots as Available	
1 I I I I I I I I I I I I I I I I I I I	Only Display Employees on Calendar that	have Work Hours Scheduled	
Company	Disregard Qualified Services in Calendar		
	Allow Double Booked Appointments		
	Auto Check Waiting List for Openings		
Hours of Operation	Prompt before Appointment Drag-n-Drop		
	Prevent Editing of History Appointments		
Taxes		urity is enabled, this option is set via the Security Profiles)	
	Require Note to be Entered when Blocki		
E .	<ul> <li>Require Initials and Note when Cancelling</li> <li>Automatically set the Preferred Stylist Af</li> </ul>		
Credit Card / ACH Options	<ul> <li>Automatically set the Preferred Stylist Ar</li> <li>Allow Appointments to be Booked during</li> </ul>		
S) 👔	Automatically Set the Front Desk Operat		
General Options	Require Initials to be Entered when Book		
	Force Selection of the Retention Code w		
	Make ALL future appointments eligible fo	2	
Define Service Types	Print Ticket to Receipt Printer upon Chee	ck In	
ALCON .	🗖 Walk In Queue - Rotate Employees		
	🔲 Walk In Queue - Print Work Ticket upon	Check In	
Calendar Options	😨 Walk In Queue - Force Client Selection		
	Color of Appointments	Standard Colors 👻	
Point of Sale Options 1	Double Book Type	Resources and Employees +	
	Calendar Name Format First Last *		
Point of Sale Options 2	Calendar Day Buttons Move by Week 👻		
<b>1</b>	Employee Image Path         C:\Documents and Settings\My Documents\My Pictures\Employee Images		
Loyalty Programs			
	Images can be stored in a shared directory, however for speed, we recommend that you copy the images to each local pc in a similar area and set the Employee Image path here to indicate the common path on each workstation that will hold the images.		
Security Options	<b>*</b>		

16. Check the **"Show Popup Window of Client Notes at POS / Calendar"** option if you would like client notes to popup when the client is selected. When you select a Client in the Appointment Calendar or Point of Sale, notes that have been entered for the client will automatically pop up. This could be an important reminder for your front desk staff or the employee that is booking the appointment.

View Notes	x
Client Notes for PEMBROOKE, ANNE	
Client prefers 2 creams and 2 sugars in her coffee.	
	V OK X Cancel

17. Uncheck the "Disregard Employee Work Schedule and show ALL timeslots as Available" check box if you have setup your employees' schedules. If you do not plan on entering the hours that your employees work or if their schedule varies, it will not be necessary to uncheck this option.

18. Check **"Only Display Employees on Calendar that have Work Hours Scheduled"** if you would like to only display employees that are actually scheduled to work on the current day. If you have a large listing of employees, this will make the list smaller when viewing the calendar and the employees that are displayed will have wider columns, allowing you to view more information about the appointments scheduled.

19. Uncheck the **"Disregard Qualified Services in Calendar"** check box if you have setup your employees' list of qualified services. To setup the qualified services for each employee, open the Employee List and click on the "Qualified Services" tab when an employee record is open.

20. Check the **"Prompt before Appointment Drag-n-Drop"** check box if you would like a warning to popup when dragging and dropping an appointment into a different timeslot. If someone drags and drops an appointment by accident, they will be asked if they are sure they would like to move the appointment. This gives them the opportunity to cancel the move if this was done by accident.

21. Check the **"Prevent Editing of History Appointments"** check box if you do not want your employees to be able to go to a past date in the Calendar and edit information about the appointments on past dates.

22. Leave the **"View Phone Number on Calendar"** option checked if you would like your employees to view the client phone numbers on top of the appointments.

23. Check the "Require Note to be Entered when Blocking Time on Calendar" option if you would like to force your employees to enter their initials and a reason when blocking out time in the Calendar. They will not be able to block out time without entering this information.

24. Check the **"Require Initials and Note when Canceling an Appointment"** option if you would like to force your employees to enter their initials and a reason when canceling an appointment in the Calendar. They will not be able to cancel an appointment without entering this information.

25. Check the **"Automatically Set the Front Desk Operator when Logging into Program"** option if you are running reports that track Add-On sales and Prebooks and would like to view who was set as the "FDO" when there was an Add-On or a Prebook scheduled.

26. Check the **"Require Initials to be Entered when Booking Appointment"** option if you would like to force your employees to enter their initials when booking an appointment in the Calendar. They will not be able to book an appointment without entering their initials.

27. Check the **"Force Selection of the Retention Code when Booking Appointment"** option if you would like to keep track of how many of your clients were "New Client", "Salon Client (Returning Clients)", "Repeat / Request" or "Referral". This can be used for the "Client Count Summary" report.

28. Click on the "Point of Sale Options 1" button on the left.

Setup Program Prefere	nces		x
📑 Setup System	m P	Preferences	Save
	^		
Options 🌣		🗹 Disable Automatic Daily Z-Out	
~		Allow Multiple POS On-Hold tickets per Client	
<b>1</b>		Automatically clear employee id field after adding a product / service to the ticket	
Company		Allow negative inventory quantity values during POS checkout	
		Enable Tan / Massage Bed Selection in POS	
		Check for Prebooked Appt at POS Checkout	
Hours of Operation	≡	Show Service Price Level 1 on POS Product Buttons	
		🖻 Do not add Duplicate Services to an existing On-Hold Ticket from the POS Checkout option	
Taxes		Disable printing of Gift Certificate at POS	
		😨 Receipt - Print Next Appointment	
<b>_</b>		Receipt - Print Balance on Gift Certificates	
Credit Card / ACH Options		Receipt - Print Item Id Instead of Description	
<b>S</b>		Receipt - Print Signature Line for On Account Payments	
100 C		Receipt - Print Remaining Balance on Prepaid Items	
General Options		Receipt - Print Available Loyalty Points	

29. Check the "Disable Automatic Daily Z-Out" option if you will be performing a Z-Out (Reconciling your Cash Drawer) every night or every morning before the start of business for the next day. If you will be performing the Z-Out each night or each morning, it will not be necessary to have the program automatically do the Z-Out. Leaving this check box unchecked will create an extra drawer for the day if you close the drawer and then the program closes the drawer again.

30. Check the **"Automatically clear employee id field after adding a product / service to the ticket"** option if your clients are serviced by multiple service providers in one day. Every time a service or product is added to a ticket you will be asked to select the employee that performed the service or sold the product to the client.

31. Check the **"Check for Prebooked Appt at POS Checkout"** option to receive a prompt if a client does not have a future appointment. When you click the "Sale / Cash Out" button to complete their sales transaction, you will be asked if you would like to create an appointment before checking the client out. If you click "Yes", the program will open or return to the Appointment Calendar.

Confirm	ı x
2	This client does NOT have a future prebooked appointment set: Employee: COLLEEN MORRIS has no prebook for Anne Pembrooke
	Do you wish to create an appointment now?
	<u>Yes</u> <u>N</u> o

32. Check the **"Receipt - Print Next Appointment"** option if you would like the client's next appointment printed on their receipt.

33. Check the **"Receipt - Print Balance on Gift Certificates"** option if you would like the client's remaining gift certificate balance printed on their receipt. This will be printed if they use their gift certificate for the transaction that the receipt is being printed for.

34. Check the **"Receipt - Print Signature Line for On Account Payments"** option if you will be using the On Accounts payment feature. This will print a signature line on your receipts when the "On Account" payment type has been selected.

35. Check "Receipt - Print Remaining Balance on Prepaid Items" if you would like the client's remaining

prepaid item balance printed on their receipt. This will be printed if they use one of their prepaid items on the transaction that the receipt is being printed for.

36. Check **"Receipt - Print Available Loyalty Points"** option if you would like the client's amount of available loyalty points printed on their receipt. This will be printed if the client has used any loyalty points on the transaction that the receipt is being printed for.

Setup Program Preferer	ices					
📑 Setup Syster	nΡ	references			$\checkmark$	Save
	1	Point of Sale Options (Page 2)				
Options 🌣		Initial Cash in Drawer		200.00		
H		Client Retention Options	Deter	mine Ret	tention and Only Prompt if Conflict	•
Company		POS Inhouse Sales Emp Id	INHOUSE			•
		POS Receipt Emp Format			First Name Only	-
Hours of Operation		POS Receipt Client Format			Name Only	•
		POS Inventory Display Order	Ba	rcode 👻		
<b>*</b>		Walk In Price Level	0 ‡	Selecting	g a Level > 0 Overrides the Standard e Price module and calculates	
Taxes		POS Change Window Delay (Sec)	30 ‡		e Price module and calculates Pricing based upon this fixed level.	
		Number of Receipts to Print	1 ‡			
Credit Card / ACH Options		Gift Certificate Template				•
) 💓 🔰		Gift Certificate Expiration in Months		0 ‡		
General Options		Force CC Scan when CC type is selected	Remin	id -		
Define Service Types		Other Payment 1 Title				4
ALL		Other Payment 2 Title				_
Calendar Options		Other Payment 3 Title				_
		Other Payment 4 Title				_
		Other Payment 5 Title				4
Point of Sale Options 1		Other Payment 6 Title				4
		Other Payment 7 Title				4
Point of Sale Options 2		Other Payment 8 Title				
Loyalty Programs		You can display custom images on the buttons by placing image files in IMGOTHER8.8MP. Button images must be windows bmp format and sh				
	-					

37. Click on the **"Point of Sale Options 2"** button on the left.

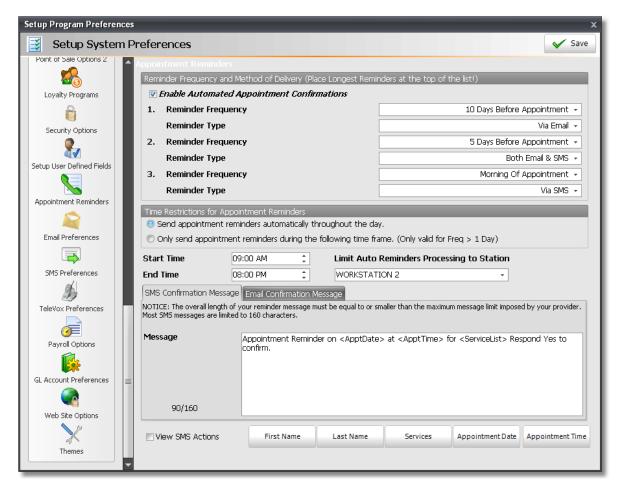
38. Enter the **"Initial Cash in Drawer"** in the field provided. This is the default amount that will show up on the Z-Out window. This amount can be changed each morning when the starting balance is counted.

39. If you will be using a barcode scanner, set the "POS Inventory Display Order" to "Barcode".

40. If you will be using Envision's Credit Card Processing Module, set the **"Force CCard Scan if CC Payment Type Selected"** option to **"Remind"** or **"Require"**. If you select the "Remind" option and someone forgets to process a credit card when a credit card payment type is selected, you will be reminded to process the card before completing the sales transaction. If you select the "Require" option, they will not be able to complete the transaction without processing a credit card first.

Confirm	ı ×
?	** Notice ** A credit card type has been selected, however, it does not appear that you have scanned a card. Do you wish to scan the card at this time?

41. If you would like to send out Automated Appointment Reminders, click on the "Appointment Reminders" button on the left.



42. Setup the frequencies that you will be using for Appointment Confirmations. For example, if you would like to send a confirmation via email seven days before your clients' appointments, choose the "7 Days Before Appointment" Reminder Frequency and then set the "Reminder Type" to "Via Email". You can also send another email one or two days before your clients' appointments and then a text message the morning of their appointment, so they can be reminded up to 3 times. You can set all three of the Reminder Frequency settings or just one or two of them. You will need to setup your Email Preferences and SMS Preferences before you are able to send the Automated Appointment Confirmations via email and SMS.

43. If you do not want Appointment Confirmations sent throughout the day, select the **"Only send** appointment reminders during the following time frame" in the **"Time Restrictions for Appointment Reminders"** section and set the **"Start Time"** and **"End Time"**. Appointment Reminders will only be sent during the times set here. You can also select a station that Appointment Reminders will be sent from if you do not want Appointment Reminders sent from all workstations that have Envision installed.

44. Check the **"Enable Automated Appointment Confirmations"** check box when you are ready to turn on the Automated Appointment Confirmations. It would be best to setup your Email Preferences and SMS Preferences before checking this box.

45. If you will be sending out Automated Appointment Confirmations or Email Marketing, click on the **"Email Preferences"** button on the left.

Setup Program Preferen	nces	x
📑 Setup Syste	m Preferences	Save
Point of Sale Options 1 Point of Sale Options 2 Point	In Preterences      Uutgoing Mail Server (SMTP) Mail Server User Name Mail Server Password Mail Server Port	state smtp.domain.com yourusername%domain.com ******* 25  SMTP Server Authentication Type UserName / Password NTLM C CRAMMDS
Appointment Reminders	Owner's Email Address Salon's Email Address	ownersemail@domain.com businessemail@domain.com Validate Account and Send Test Email INVALID

46. Enter the **"Outgoing Mail Server (SMTP)"** in the field provided. If you are not sure what this is, your email provider should be able to provide you with this information.

47. Enter the "Mail Server User Name" and "Mail Server Password" in the fields provided. If you are not sure what this information is, your email provider should also be able to provide you with this information.

48. The most commonly used "Mail Server Port" is "25", however you may need to enter a different port number depending on the port used by your email provider.

49. Enter the "Owner's Email Address" and the "Salon's Email Address" into the fields provided.

50. Click the "Validate Account and Send Test Email" button to test these settings. The word "Valid" will be displayed below this button when the settings have been validated.

51. If you have signed up for an Envision SMS Account, click on the "SMS Preferences" button on the left.

etup Program Preference	;		
📑 🛛 Setup System I	Preferences		Save
Calendar Options	SMS Options		
S	Envision SMS Account Setup		
Point of Sale Options 1	Please ca	ll 1-407-253-0913 or via email at sales@en	noview.com to setup your SMS account.
<b>S</b>	Client Id		
Point of Sale Options 2	UserName		
	Password		
Loyalty Programs	SMS Country Code Prefix		1
ê	SMS Account	INVALID	Validate Account & Check Balance
Security Options	Confirm Key yes	Cancel Key cancel	View SMS Billing History
2	Automatically notify employ	yee on appointment cancellations.	
Setup User Defined Fields		yee on new appointments scheduled	for today.
	Automatically notify employ	·	
Appointment Reminders	Allow Clients to Cancel App	pointments via SMS by texting above k	key
	Modify SMS Messages 160	character length	
M	Waiting List Message Walk-In	n Queue Message Employee Cancel M	lessage Employee Today Message
Email Preferences	Please call the salon, we now	have an opening on the schedule for	your appointment.
3			
SMS Preferences			
Web Options			
Payroll Options			
<b>V</b> <sup>y</sup>		First Name Last Name	Services Appointment Date Appointment Time
Themes	83/160	First Name Last Name	Appointment Date Appointment Time
memes			

52. Enter your SMS Account information into the fields provided. You can also check your balance, history and edit your SMS messages. If you are not signed up for an SMS Account and would like to be, please contact us at 1-407-253-0913 or email us at sales@ennoview.com to setup your SMS account.

53. Check the "Automatically notify employee on appointment cancellations" check box if you would like a text message sent your employees when one of their appointments has been canceled.

54. Check the **"Automatically notify employee on new appointments scheduled for today"** check if you would like a text message sent to your employees when a new appointment is scheduled for them on the current day.

55. Check the **"Automatically notify employee on Client Check In"** check box if you would like a text message sent to your employees when their client is checked in.

56. Check the "Allow Clients to Cancel Appointments via SMS by texting above key" check box if you would like your clients to be able to automatically cancel their appointment by texting the word that you enter into the "Cancel Key" field above.

53. If you have a Twitter Account for your business or if you are using one of Envision's Online Booking options, click on the **"Web Options"** button on the left.

Setup Program Preferenc	es	x
📑 Setup System	Preferences	Save
Point of Sale Options 2	Envision Web Options     Twitter Account Information	
<u>A</u>	UserName	UserName
Security Options	Password	*******
8	Size of Viewing History (20 - 200)	20 🛟
Setup User Defined Fields		
	Online Appointment Web Site	
Appointment Reminders	Please call 1-407-253-0913 or via email a	it sales@ennoview.com to setup your Web Site account.
	Client Id	
Email Preferences	UserName	
	Password	
SMS Preferences		

54. Enter your Twitter Account Information in the fields provided.

55. Enter your Online Booking account information in the fields provided. If you have not setup a Web Site account yet and would like to do this, please contact us at 1-407-253-0913 or via email at <u>sales@ennoview.</u> <u>com</u>.

56. Click the **"Save"** button in the upper right hand corner of the **"Setup Program Preferences"** screen to save your settings.

### 7. Setup Commission Plans

If you will be using Envision to calculate commissions for payroll, it will be important to setup Commission Plans before setting up your Employee List. There are multiple ways of setting up Commission Plans. The following instructions will provide steps for setting up a Straight Commission Percentage Plan, a Sliding Scale Commission Plan and an Inventory Department Commission Plan.

### **Straight Commission Plan**

The following instructions are for setting up a Straight Commission Plan of 50% for service items and 10% for retail items.

- 1. Click on "Accounting" on the Menu Bar of Envision.
- 2. Select "Commission Plans" from the menu.
- 3. Click on the "New" button at the top of the list.

rvice Commission	Retail Commission	Retail to S	ervice Bonu	s Manager	Commissior	1			
ommission Plan De	scription	50% SE	50% SERVICE / 10% RETAIL PLAN						
Service Commission (	Options	_	_	_	_	_	_	_	
Plan Type Straight Scale Commission -				- Servic	Service Deductions				
No Commission O	verrides Allowed	) Su	btract Before	e Commission	Calculation				
Exclude Inv Overhead Deductions									
Exclude Inv Labor Deductions									
Exclude Inv New	Account Deductions								
Add a Flat Charge	per Item					0			
Add a Flat Charge	per Ticket					0			
Set all Overhead d	eductions to this pe	ercentage				0			
Service Commission Pl	lan								
	Enter Low	values first	and increas	e the range	/ percenta	ges to the l	right		
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	
From Sales	0	0	0	0	0	0	0	0	
To Sales	99999999	0	0	0	0	0	0	0	
	50.00	0.00	0.00	0.00	0.00	0.00	0.00		
Percent %	30.00	0.00							
Percent %	30.00								
Percent %	30,00								
Percent %	30.00								

- 4. Enter a name for the Commission Plan in the "Commission Plan Description" field.
- 5. Click on the drop down arrow in the "Plan Type" field and select the "Straight Scale Commission" plan type.
- 6. Leave the "From Sales" field under the "Level 1" column set to zero.
- 7. Click in the "To Sales" field under the "Level 1" column and enter "999999999".
- 8. Click in the "Percent %" field under the "Level 1" column and enter "50".

9. Click on the "Retail Commission" tab at the top of the screen.

Gervice Commission Retail Co	ommission	Retail to Se	ervice Bonu	s Manager	Commission	1			
Retail Commission Options									
Plan Type Stra	aight Scale Co	ommission		•					
No Commission Overrides Allowed       Minimum Service Sales Required       0         Exclude Service Deductions from RTS%       Maximum RTS Commission %       0         Exclude Tanning Sales       Minimum RTS % Required       0         Exclude Gift Certificate Sales       Minimum RTS % Required       0									
Retail Commission Plan			_						
Select From / To Scale O Total Retail Sales	_	_		Calculate Co	ommission % ail Sales	_	_	_	
<ul> <li>Total Retail Profit</li> </ul>				© On Ret					
Total Service Sales				On Serv	/ice Sales				
Enter Low values first and increase the range / percentages to the right Level 1 Level 2 Level 3 Level 4 Level 5 Level 6 Level 7 Level 8									
From Sales	0	0	0	0	0	0	0	0	
To Sales	99999999	0	0	0	0	0	0	0	
Percent %	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

10. Click on the drop down arrow in the "Plan Type" field and select the "Straight Scale Commission" plan type.

11. Check the **"No Commission Overrides Allowed"** check box if you do not want commission overrides for retail items to affect the retail commission for anyone under this commission plan. If you have any Commission Overrides setup for any of your retail items, they will not be used with this box checked.

12. Check the **"Exclude Tanning Sales"** check box if you sell tanning services and do not want anyone under this commission plan to receive commission on Tanning sales.

13. Check the **"Exclude Gift Certificate Sales"** check box if you do not want anyone under this commission plan to receive commission on Gift Certificate sales.

- 14. Leave the "From Sales" field under the "Level 1" column set to zero.
- 15. Click in the "To Sales" field under the "Level 1" column and enter "99999999".
- 16. Click in the "Percent %" field under the "Level 1" column and enter "10".
- 17. Click the "Save" button on the right.

### **Sliding Scale Commission Plan**

The following instructions are for setting up a Sliding Scale Commission Plan. The Sliding Scale Commission for service will specifically be from \$0 to \$1000, 50%, from \$1000 to \$2000, 52%, and from \$2000 and up, 53%. The Sliding Scale Commission for Retail will specifically be from \$0 to \$500, 10%, from \$500 to \$1000, 15% and from \$1000 and up, 17%.

- 1. Click on "Accounting" on the Menu Bar of Envision.
- 2. Select "Commission Plans" from the menu.
- 3. Click on the "New" button at the top of the list.

rvice Commission									
ommission Plan Des	SLIDING	SLIDING SCALE COMMISSION PLAN							
Service Commission O	ptions							_	
Plan Type	e Sliding Scale Commission -				Service Deductions				
No Commission Ove	errides Allowed	🙁 Su	btract Befor	e Commission	Calculation				
Exclude Inv Overhead Deductions     Subtract After Commission Calculation									
Exclude Inv Labor Deductions									
Exclude Inv New A	account Deductions								
Add a Flat Charge p	er Item					0			
Add a Flat Charge p	er Ticket					0			
						-			
Set all Overhead de	ductions to this pe	ercentage				0			
Set all Overhead de	ductions to this pe	ercentage				_			
	-	ercentage	_	_		_	_		
	'n	-	and increas	e the range	/ percenta	0	right	_	
	n Enter Low	-		-	/ percenta Level 5	0	right Level 7	Level 8	
Set all Overhead de Service Commission Pla From Sales	n Enter Low	values first		-		0 ges to the	-	Level 8	
Service Commission Pla	n Enter Low Level 1	values first Level 2	Level 3	Level 4	Level 5	ges to the Level 6	Level 7		
Gervice Commission Pla From Sales	n Enter Low Level 1	values first Level 2 1000	Level 3	Level 4	Level 5	ges to the Level 6	Level 7		

- 4. Enter a name for the Commission Plan in the "Commission Plan Description" field.
- 5. Click on the drop down arrow in the "Plan Type" field and select the plan type.

Sliding Scale Commission vs. Straight Scale Commission: You can choose either the "Straight Scale Commission" plan type OR the "Sliding Scale Commission" plan type for a Sliding Scale Commission Plan. Using the sliding scale commission specified for these instructions and in the image above, if an employee sells \$1500 in Service Sales and you would like to pay the employee 52% on the entire \$1500, you would select a "Straight Scale Commission" plan type. If you would like to pay the employee 50% on the first \$1000 and then 52% on the remaining \$500, select the "Sliding Scale Commission" plan type.

- 6. Leave the "From Sales" field under the "Level 1" column set to zero.
- 7. Click in the "To Sales" field under the "Level 1" column and enter "1000".
- 8. Click in the "Percent %" field under the "Level 1" column and enter "50".
- 9. Click in the "From Sales" field under the "Level 2" column and enter "1000".
- 10. Click in the "To Sales" field under the "Level 2" column and enter "2000".
- 11. Click in the "Percent %" field under the "Level 2" column and enter "52".

- 12. Click in the "From Sales" field under the "Level 3" column and enter "2000".
- 13. Click in the "To Sales" field under the "Level 3" column and enter "99999999".
- 14. Click in the "Percent %" field under the "Level 3" column and enter "53".
- 15. Click on the "Retail Commission" tab at the top of the screen.

ervice Commission Retail	Commission	Retail to S	ervice Bonu	s Manager	Commission	1		
Retail Commission Options								
Plan Type	Sliding Scale Cor	nmission		•				
No Commission Override				inimum Serv		•		0
Exclude Service Deductions from RTS%     Maximum RTS Commission %     0       Exclude Tanning Sales     Minimum RTS % Required     0								
Exclude Gift Certificate Sales								
Retail Commission Plan								
Select From / To Scale					ommission %			
💿 Total Retail Sales				😑 On Ret				
💿 Total Retail Profit				© On Ret				
Total Service Sales				© On Serv	/ice Sales			
				e the range		-	-	1 1 0
	Level 1	Level 2	Level 3				Level 7	Level 8
From Sales	0	500	1000		0	0		0
To Sales	500	1000	999999999	0	0	0	0	0
Percent %	10.00	15.00	17.00	0.00	0.00	0.00	0.00	0.00

16. Click on the drop down arrow in the "Plan Type" field and select the plan type.

Sliding Scale Commission vs. Straight Scale Commission: You can choose either the "Straight Scale Commission" plan type OR the "Sliding Scale Commission" plan type for a Sliding Scale Commission Plan. Using the sliding scale commission specified for these instructions and in the image above, if an employee sells \$550 in Retail Sales and you would like to pay the employee 15% on the entire \$550, you would select a "Straight Scale Commission" plan type. If you would like to pay the employee 10% on the first \$500 and then 15% on the remaining \$50, select the "Sliding Scale Commission" plan type.

17. Check the **"No Commission Overrides Allowed"** check box if you do not want commission overrides for retail items to affect the retail commission for anyone under this commission plan. If you have any Commission Overrides setup for any of your retail items, they will not be used with this box checked.

18. Check the **"Exclude Tanning Sales"** check box if you sell tanning services and do not want anyone under this commission plan to receive commission on Tanning sales.

19. Check the **"Exclude Gift Certificate Sales"** check box if you do not want anyone under this commission plan to receive commission on Gift Certificate sales.

- 20. Leave the "From Sales" field under the "Level 1" column set to zero.
- 21. Click in the "To Sales" field under the "Level 1" column and enter "500".
- 22. Click in the "Percent %" field under the "Level 1" column and enter "10".
- 23. Click in the "From Sales" field under the "Level 2" column and enter "500".
- 24. Click in the "To Sales" field under the "Level 2" column and enter "1000".

- 25. Click in the "Percent %" field under the "Level 2" column and enter "15".
- 26. Click in the "From Sales" field under the "Level 3" column and enter "1000".
- 27. Click in the "To Sales" field under the "Level 3" column and enter "99999999".
- 28. Click in the "Percent %" field under the "Level 3" column and enter "17".
- 29. Click the "Save" button on the right.

### Inventory Department Commission Plan

The following instructions are for setting up an Inventory Department Commission Plan. The percentage will depend on the percentage setup for each Inventory Department. The Inventory Department Commission Plan can only be setup for Service Commission.

- 1. Click on "Accounting" on the Menu Bar of Envision.
- 2. Select "Commission Plans" from the menu.
- 3. Click on the "New" button at the top of the list.

Service Commis	ion	Retail Commission	Retail to Service Bonu	s M	lanager Commission
Commission Plan Description INVENTORY			INVENTORY DEPT C	DMM	ISSION PLAN
Service Commi	sion C	ptions			
Exclude Inv	Plan Type       Inventory Department Commission         No Commission Overrides Allowed         Exclude Inv Overhead Deductions         Exclude Inv Labor Deductions         Exclude Inv New Account Deductions				Service Deductions           Subtract Before Commission Calculation           Subtract After Commission Calculation
Add a Flat Cl	Add a Flat Charge per Item Add a Flat Charge per Ticket Set all Overhead deductions to this percentage				

4. Enter a name for the Commission Plan in the "Commission Plan Description" field.

5. Click on the drop down arrow in the "Plan Type" field and select the "Inventory Department Commission" plan type.

6. Click the "Save" button on the right.

Inventory Department Commission Percentages: To setup the percentages for each Inventory Department, click on "Inventory' on the Menu Bar of Envision and select "Inventory Departments" from the menu. Click in the "Commission %" field on the right side of the list and enter the correct commission percent for each service department.

Inventory Departments	🔒 Save	🗙 <u>D</u> elete 🛛 🐬 Opti	ons 🗸 🕕 Exit
Inventory Department	🛆 Display Order	Display on POS Tabs	Commission %
Click here	to add a new Inventory Department		
ESTHETIC - ADDL SERVICE	12		60.00
ESTHETIC - FACIAL	9	<b>V</b>	60.00
ESTHETIC - MAKEUP	11	<b>V</b>	65.00
ESTHETIC - WAXES	10	<b>V</b>	60.00

### 8. Setup Employee List

It will be necessary to setup your list of employees so that you are able to schedule appointments for them and select them as the service provider or sales person for sales transactions.

- 1. Click on "Employee" on the Menu Bar at the top of the screen.
- 2. Select the "Employee List" from the drop down menu.

3. Click the **"New"** button on the Tool Bar to add a new employee to the list or you may left click on an employee's name (must be highlighted) and click the "Edit" button to edit the employee's file.

Manager Employee List		Search	Sort	• 🚯 Exit
Address Other Certifications	Custom Notes Messages Quali	fied Services Payroll		
Employee Id	ANNE CREW		Employee is Active	🔒 Save
Employee #		2		Save &
First Name	Anne			<u>iv</u> ew
Middle			Gender	X <u>C</u> ancel
Last Name	Crew		Female	Next
Nick Name				Previous
Address 1			Appointment Book	
Address 2			Show on Appointment Book	
City			Display Order 5 💲	
State / County		Department	ESTHETICIAN -	
Postal Code		Alt Contact		
County		Alt Phone		
Phone		Location	MAIN	
Mobile		Send Messages Via	Both Email & SMS 👻	
Work		]		
Beeper		Last Update -	8/20/2009 11:01:50 AM	
Email				
Image File Name	C:\Documents and Settings\My D	ocuments\My Pictures\Emp	loyee Images\c-2.jpg ····	
	Images can be stored in a sh each local pc in a similar area	nared directory, however for spi a and set the Employee Image p	eed, we recommend that you copy the images to ath in the company setup options.	

4. Enter an **"Employee Id"** at the top of this screen. The Employee ID is used to Login/Logout an employee and is also used for searching for an Employee in the Point of Sale or Appointment Calendar windows. It is best to enter a name into this field.

5. Enter all available employee contact information on this "Address" screen.

6. Uncheck the **"Show in Appointment Book"** check box if the employee you are entering does not take appointments.

Appointment Book Settings: If the employee is front desk staff, they will not need their own column in the calendar. You may also specify the Display Order. The number that you enter into the Display Order field will specify which column the employee shows up in on the Appointment Calendar.

7. Select or add a "**Department**" for the employee. Select the Employee Department by clicking on the drop down arrow in the Department field. Setting up departments for your employees will allow you to view employees in the Calendar by the Employee Department. For example, if you have Stylists, Nail Techs, Estheticians and Massage Therapists and would like to view only your Stylists to book a haircut appointment, you will be able to click on a department for your stylists if you have created an Employee Department for this.

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**Creating Employee Departments:** You must create a list of Emloyee Departments before you are able to select a department here. To add an Employee Department, click on **"Employee"** on the Menu Bar of Envision and select **"Employee Departments"** from the menu. You will then be able to create your list of Employee Departments.

8. Select a **"Location"** if you have multiple business locations and you are using the Enterprise version of Envision, select the appropriate location that the employee normally works at.

9. In the "Send Messages Via" field, select the method that the employee prefers to have messages and confirmations sent to them. Envision can send messages to the employee to inform them of a new appointment or a canceled appointment. If the employee does not use a phone for text messaging, you will need to select "Email Only" or "Disable Confirmations" if they do not want to receive any confirmations. If they use their phone for text messaging they will probably prefer the "SMS Only" option or "Both Email & SMS".

Employee List		Search	Sort	- 🕕 Exit
Address Other Certifications	s Cus <u>t</u> om Not <u>e</u> s <u>M</u> essages Qualifi	ied Services Payroll		
Employee Type Birthdate Date Started Terminated On Set New Password Security Level ID Card Employee Client Link Service Provider Type	s Custom Notes Messages Qualif	ed Services Payrol	Pager Type      Not Selected     Vibration Only     Numeric Only     Alpha Numeric  Pager Id     O     S     Allow Access to Internet Site     Enable Internet Site Administration	Save       Save &       Save &       Next       Previous
FAME Id Service Price Level © Level 1 © Level 2 @ Level 3 © Level 4	© Level 4AA © I © Entry Level © Level 8	Level 9 Level 10		
Employee Goal Preferences Plan Type Level	STANDARD PLAN	▼ Level 3 ▼		

10. Click on the "Other" tab at the top of the screen.

#### 11. Select or add an "Employee Type" (optional).

You may create or select an Employee Type if your Employee Departments have different types of employees under each department. You may also use this for categorizing your employee. An example of an Employee Type would be Hair Color Specialist, or you may use the Type to specify which level the employee is. It is not necessary to enter an Employee Type, however they can be displayed below the employee's name at the top of their column in the calendar.

Address Other Certifications Custon	Not <u>e</u> s Messages Qualified Ser <u>v</u> ices Pay
Employee Type	· ·
Birthdate	Description
Date Started	
	LEVEL 1
Terminated On	LEVEL 2
Password	LEVEL 3
Socurity Loyal	LEVEL 4

<b>Setting Up Employee Types:</b> To setup your Employee Types, click on "Employee" on the Menu Bar of Envision and select "Employee Types" from the menu.
<b>Displaying Employee Types on the Calendar</b> : To display the Employee Types below the employee's name at the top of their column in the calendar, click on the "Calendar" button on the Tool Bar at the top and click on the "Theme" button at the top of the calendar. Click on the drop down arrow to select the "Employee Description" in the lower right hand corner. You can display the Employee Department or the Employee Type.
Employee Descriptions Show Department Name Show Department Name Show Employee Type Name

12. Select the Employee's "Birthdate" and "Date Started" if you would like to keep this information on record.

13. Enter a **"Password"** and select a **"Security Level"** if you will be using the Time Clock and Program Security (optional). A password for each employee will need to be entered if you would like to use Envision's Security feature and Time clock. This is the password that each Employee will need to Log In and Log Out with. The Pager Type and Page ID are to be entered if you are using the pager system.

Setting Up Security: There are three parts to setting up the Program Security. First Security Profiles are created, then Passwords and Security Profiles are assigned to each employee, and last is enabling the Program Security. This is the second step of setting up the security. For more information on setting up the Security Profiles, please refer to the "Setup Security" section of this guide. For information on enabling the security, please refer to "Enable Program Security" under the "Setup Program Preferences" section of this guide.

14. Select a **"Service Price Level"** if your employees are setup for different levels of pricing based on experience (optional). The Service Price Level is the level associated with the price levels you setup for services. This is the price level that the employee will charge their clients.

13. Click on the **"Certifications"** tab at the top of this screen if your employees have certifications or licenses that you need to keep on record.

🌈 Employee List		Search	Sort		• Exit
Address Other Certifications Custom	Notes Messages Qualified Se	ervices Payroll			
List Employee Certifications & Licenses					📙 <u>S</u> ave
Certification Id	Start Date	Expires On	Updated On U	pdated By	Save &
*	Click here to ad	d a new row			Save & <u>N</u> ew
> STATE LICENSE			2/11/2005 2:57:5€ A	SHAS	X Cancel
CITY LICENSE			2/11/2005 2:57:5€ A	SHAS	
					Next
					Previous
					=

14. To add certifications to this list, click in the field labeled "Click here to add a new row". Clicking in this field will provide a drop down arrow. Click the drop down arrow to select the first certification from your list. If you need to add additional certifications, click in the blank row directly below the row where the first certification was selected. The first certification will move to the second row and you will be able to add an additional certification by clicking in the field labeled "Click here to add a new row". After selecting the Certification, enter the dates the Certification is good for. If a Certification or qualification has no expiration date, leave that field blank.

es <u>M</u> essages (
Start
Click
<b>*</b>
<b>^</b>
=
-

Setting Up Employee Certifications: To create your list of Employee Certifications, click on "Employee" on the Menu Bar of Envision and select "Employee Certifications" from the menu. 15. Select the "Start Date" and "Expires On" date of the Certification.

**Removing Certifications:** If you would like to remove a certification, right click on top of the certification in the list and select "Remove this Item".

16. Click on the **"Custom"** tab at the top of this screen if you would like to enter information into your User Defined Fields for the employee.

Manual Employee List		Search	Sort	• 🕕 Exit
Address Other Certification	ns Custom Notes Messages Qualit	fied Ser <u>v</u> ices Payroll		
Emergency Contact	Molly			Save
Emergency Phone	555-555-3652			Save & New
Driver's License				
USER04				X Cancel
USER05				Next
USER06				- Next
USER07				Previous
USER08				+ Plevious
USER09				

Setting Up Custom Fields: To setup your custom fields, click on "Company" on the Menu Bar of Envision and select "Setup Program Preferences" from the menu. Click on the "Setup User Defined Fields" button on the left to enter your own User Defined Fields.

17. Click on the "**Notes**" tab at the top of this screen if you would like to enter notes about this employee that you may want to keep on record.

Market Employee List	Search	Sort	• 🚺 Exit
Address Other Certifications Custom Notes Messages Qualified Services Employee Notes Notes for Anne	Bayrol .		Save & Save & New Cancel Next

**Employee Notes:** The notes entered here can also be viewed in the Appointment Calendar. These notes should not be personal or private notes for the employee. The notes entered here can be used to assist your Front Desk with scheduling appointments if there is any information that the employee needs to remember when scheduling an appointment for this service provider.

18. Click on the "Messages" tab at the top of this screen. Use the Messages screen to send a message to an employee when they clock in with the Employee Time Clock.

ddress Other Certi					Sort	• 🕕 Exit
CONTRACTOR OF TAXABLE PARTY.	fications Cus <u>t</u> om Not	es M	essages Qualified Services Payroll			
						🔒 <u>S</u> ave
inter Message			☑ Alert Employee at Clock In		🖌 Add New Msg	Save & <u>N</u> ew
						X <u>C</u> ancel
						Next
						Previous
Entered On	Entered By	Alert	Note	Received	Updated Or Updated By	
8/7/2009 4:23:31 PM	ASANTIAGO		Please complete a physical count of inventory today		ADMIN	

**Employee Messages:** The Message screen can be used when a message needs to be passed on to an employee and you are not sure if they will receive the message or if you do not have time to give them the message yourself. You may enter the message in this screen and it will pop up when they clock in. You will also be able to see when the message was received.

19. Click on the "Qualified Services" tab at the top of this screen. Select the services that the employee is qualified to perform. To do this, click the "Add Item" button in the lower left hand corner of this screen or you may select a service department in the lower right hand corner of this screen and click the "Add All" button to add all of the services from the selected department.

ist Services this Employee is Qualified to Perform	1 & Price Overri	ides				🔒 Save
Service	Setup	Process	Complete	Price Override	Commission Override	Save &
ALPHA BETA PEEL FACIAL	01:00	00:00	00:00	0.00	0.00	Save & <u>N</u> ew
ANTI-AGING AND FIRMING FACIAL	01:30	00:00	00:00	0.00	0.00	X Cancel
BACK TREATMENT (30MIN)	00:30	00:00	00:00	0.00	0.00	< cancer
BACK TREATMENT (60MIN)	01:00	00:00	00:00	0.00	0.00	Next
BODY WRAPS	00:45	00:00	00:00	0.00	0.00	
BRIDAL MAKEUP APPLICATION	01:30	00:00	00:00	0.00	0.00	Previous
BRIGHTENING ENHANCEMENT TREAT	00:30	00:00	00:00	0.00	0.00	
CAMOUFLAGE LESSON	01:00	00:00	00:00	0.00	0.00	
CHIN WAX	00:15	00:00	00:00	0.00	0.00	
COLOR COSMETIC LESSON	00:45	00:00	00:00	0.00	0.00	
EYE MAKEUP LESSON	01:00	00:00	00:00	0.00	0.00	
EYEBROW WAX	00:15	00:00	00:00	0.00	0.00	
FACIAL	01:15	00:00	00:00	0.00	0.00	
FACIAL WAX	00:30	00:00	00:00	0.00	0.00	
FULL ARM WAX	00:30	00:00	00:00	0.00	0.00	
FULL LEG WAX	00:30	00:00	00:00	0.00	0.00	
HALF ARM WAX	00:30	00:00	00:00	0.00	0.00	
HALF LEG WAX	00:30	00:00	00:00	0.00	0.00	
INTENSE HYDRATING FACIAL	01:00	00:00	00:00	0.00	0.00	
LIP WAX	00:15	00:00	00:00	0.00	0.00	
MAKEUP CONSULTATION	01:00	00:00	00:00	0.00	0.00 👻	
(+++ +> +> ++ ++ - + - + × ∩						
Add Item Departme	nt			•	Add All	
hemove Cancel Class				•	Remove All	

20. You may also enter a specific price that this employee charges for these services if they charge a different price than the one you have entered in the service list (optional).

**Employee Price:** If the employee does not charge a different price than the prices you have setup for each service, leave the price at "0.00".

21. Enter the amount of time that it takes for this employee to complete the selected services. If When this employee is selected in the Appointment Calendar for an appointment, the times that you enter here will override the time that you have set for the service in the Service List.

22. Enter a specific dollar amount in the Commission Override field if the employee needs to receive a specific dollar amount of commission for a specific service (optional).

**Commission Override:** It is not necessary to enter an amount in this field if you would like the employee to be paid according to the Commission Plan you will be setting up for your employees. It is only necessary to enter a dollar amount here when the employee will be receiving a specific dollar amount instead of their commission percentage.

23. Click on the **"Payroll"** tab at the top of this screen. Enter the employee's payroll information on this screen. A Commission Plan can only be selected after you have set up your Commission Plan List.

Market Employee List		Search	Sort	- 🕕 Exit
Address Other Certifications Cus	s <u>t</u> om Not <u>e</u> s <u>M</u> essages Qualified S	ervices Payroll		
Payroll Options / YTD Payroll Figure				Bave
Hourly Wage	8.00	Рау Туре	Hourly -	Save &
Yearly Salary	0.00	Employment Status	Full Time 🔹	
Commission Plan	ESTHETIC COMMISSION PL/ -	Payroll Period	Weekly 🗸	X <u>C</u> ancel
Daily Booth Rental Fee	0.00	Pay Greater of Wages or	Commissions	Next
POS Emp Ded Allow	0.00			Previous
Employee Client Link		•		
Self Employed / Independent				
Booth Renter / Self Employed	- Do not charge tax			
Payroll Options 2009 YTD Payroll F	Figures Adjustments			

Setup Commission Plans: Commission Plans can be setup by clicking on "Accounting" on the Menu Bar of Envision and selecting "Commission Plans" from the menu.

Pay Greater of Wages or Commission: The "Pay Greater of Wages or Commission" option allows you to pay an employee whichever is greater during the payroll period. If their hourly wage or yearly salary is greater than the commission they make during the payroll period, the payroll will pay this amount instead of the amount they made from commissions.

24. Click the **"Save"** button on the right to add the employee to the list or click the **"Save & New"** button to add the employee and open a blank entry screen. The **"Save & New"** button can be used when you are entering one employee after another.

# 9. Setup Employee Schedules

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The Employee Schedule is where you will set the hours that each employee is available for in the Appointment Calendar.

- 1. Click on "Employee" on the Menu Bar at the top of the screen.
- 2. Select "Employee Schedule" from the drop down menu.

Schedule For: 9	)/27/2009 to				9/28/2009	•	関 Tod	ау		- 4	Actio	ns 👻	- Ø	Exit
Employee Phone No.	Sun Sep 27	Mon Sep 28	Tue Sep 29	Wed Sep 30	Thu Oct 01	Fri Oct 02	Sat Oct 03		<b>4 4</b> Sun 30	Mon 31	Si Tue N 1	ep 2009 Wed TI 2	nu Fri 3 4	► ₩ Sat
USE, ADMIN 57.00 Hours	08:00 a 08:00 p OFF	09:00 a 08:00 p WORK	09:00 a 10:00 p WORK	09:00 a 08:00 p WORK	09:00 a 08:00 p WORK	09:00 a 08:00 p WORK	08:00 a 08:00 p OFF		6 13	7 14	8 15	9 .	10 11 17 18	12
CREW, ANNE	08:00 a 08:00 p OFF	09:00 a 08:00 p WORK	09:00 a 10:00 p WORK	09:00 a 08:00 p WORK	09:00 a 08:00 p WORK	09:00 a 08:00 p WORK	08:00 a 08:00 p OFF		20 27 4	21 28 5	22 29 6	30	24 25 1 2 8 9	26 3 10
DUNTS, BARBARA 0.00 Hours	08:00 a 08:00 p OFF	Add Mode							Today	Monda	ay, Sep	/ itember 2 e's Star	8, 2009	
RIDGES, BRENDA 0.00 Hours		day to	ble left click enter the S and End Tin	tart				ſ	Name			and Act		Ĩ
SWANSON, CAMILLE						4. Enter the '	'Start Time".			: Date : Time		9/28/2 09:00		÷
CONNOR, CARRIE						End Time", " and "Type"he also select a	Break Time", ere. You can		End 1 Breal	fime < Time	•	08:00 00:00		÷
MORRIS, COLLEEN 0.00 Hours						assistant if	necessary.	1	<b>Type</b> Work	:				Ŧ
MARLOW, CONNER 0.00 Hours									Optic	onal A	ssista	int		•
COLLINS, DANIKA 0.00 Hours						b	lick the "Upda utton save the ied time in th	9		V U		e 🔉	Cano	_
COLE, DEBRA 0.00 Hours							you selected.	~	╵┢			py Sch		
		Double di	ck on the cell	you wish to n	nodify / Or or	Name for Mon	thly Calendar	w v	hedul: vould: veek's	ick the e" but like to sched mount	ton if copy t ule fo	you the r a		_

3. Double Left Click on the cell for the day you would like to modify.

4. Enter the "Start Time", "End Time", "Break Time", and "Type" on the right.

Under each employee's name and telephone number are the total Hours scheduled for the week. Don't forget to schedule in "Break Time" for meals and breaks. These deduct from the total hours for the week. You can also clear a selected day for an employee by highlighting the day and clicking the "Clear Selected Day" button.

5. Click the "Update" button save the modified time in the cell you selected.

6. Click the "Copy Schedule" button if you would like to copy the week's schedule for a certain amount of weeks.

The following screen appears when you click the "Copy Schedule" button. This screen allows you to copy a schedule you have created for one week to as many weeks as you wish. If there are duplicates already scheduled in the destination time period you will be warned and allowed to make choices.

Copy Work Schedules	x
🧃 Copy Work Schedules	
Select Schedule to Copy	
Copy All Schedules	
Copy Individual Employee Schedule     ANNE CREW	•
Select Options	
Num of Weeks to Copy Schedule	52 ‡
Frequency to Copy	Weekly -
Copy Assigned Assistant	
Copy Schedule Rules	
Prompt for each duplicate work schedule	
Automatically overwrite existing schedule	
C Leave all existing schedules as-is	
	V OK X Cancel

7. Select either **"Copy All Schedules"** or **"Copy Individual Employee Schedule"**. If you select an Individual schedule, you must select the employee from the drop down list in the Employee field to the right.

8. In the "Num of Weeks to Copy Schedule" field, use the small arrow buttons to select how many weeks you want to copy the schedule you created. For example, if you would like to copy the employee's schedule out for a year, enter "52" into the number of weeks field.

9. Select the **"Frequency to Copy"**. This is how often the employee has this schedule. If they have the same schedule every week, the frequency should be set to **"Weekly"**. If they have the same schedule every other week, the frequency should be set to **"2 Weeks"**. If this is the case, you will need to go to the very next week in the calendar, enter their schedule for that week and then copy that week's schedule out for a frequency of **"2 weeks"**. This will create a schedule of two different weeks that alternate. This is commonly used if an employee works every other Friday or Saturday.

10. Select the "Copy Schedule Rules" option that you would like to use.

In case you have created future weeks schedules for this employee, you may not want to overwrite them. For example, you may have gone 8 weeks into the future to change a days schedule for this employee because of personal reasons. There are 3 options you may use to determine If and How you will overwrite future schedules.

- Prompt for each: You will be prompted before overwriting future schedules.
- Automatically Overwrite: This will overwrite all future weeks without prompting you.
- Leave all Existing: This will not overwrite any future weeks.

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### **10.** Transfer Appointments into the Envision Calendar

Before you are able to schedule appointments in Envision for new appointments or for new clients, you will need to transfer appointments from your old program or old appointment book into the Envision Calendar. In order to do this efficiently, it would be best to select a "Go Live Date" for Envision. The "Go Live Date" is the date that you would like to start using Envision exclusively. After deciding what the best date is to do this, you will want to start entering all of the appointments that are already scheduled on that date and any appointment scheduled after that date, into the Envision Calendar. By doing this, all of your appointments will be in the Envision Calendar when you start to use the program. You will not need to go back to the old program or appointment book to check for an appointment. This also will give you the opportunity to add the clients into Envision that already have an appointment scheduled. Below are instructions for scheduling an appointment.

The instructions here are simple instructions for scheduling an appointment.

1. Double left click on a time slot in the correct employee's column for the appointment you would like to schedule. It is important that you click on the correct timeslot. This will automatically set the "Appt Date", "Appt Time" and "Employee Id" for you.

Schedule Appointment				
PhoneH: 5Balance Due0.00GC Outstanding100	HIS, CHARLENE 55-555-9826 M: 555-555-1784 W: 00 Active Prepaids Available	First Visit         11/23/           Last Visit         8/19/2009 1           Birthday         2/17/	0:58 2005 Salon Clie Repeat/R Referral	Add Client
	ervices Slots Available Available Prepaid	s Purchases Appointment List	Cancel / No Show	s
Step 2     Enter Appo       Appt Date     10/1/2009	intment Details Appt Time Employee Id 02:30 PM  CARRIE CONNOR	(Prefers Female Only) (Prefers: CAMILLE SWANSON)	\$	
Service Id	MANICURE	•	Show All	
Room / Equipment	MANICURE STATION	•		Booked By
Group	HILLARY'S BRIDAL PARTY	•		DM Coupon / Promo
Adjust Service Times		0:00 ¢ Reset		×
Client Notes Today's	Notes Today's Appointments Service N Employee Descript			Return to Schedule
> 10/1/2009 12:00 PM	CAMILLE SWANSON UPDOS		GENERAL	Book & Add
10/1/2009 01:00 PM	ANNE CREW BRIDAL	MAKEUP APPLICATION ESTHET	TC - MAKEUP	Services
ાલ લ લ ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ►	02:32 PM by FDO ADMIN Updated On 12/	30/1899 12:00 AM <b>By</b> ADMIN		Finished Return to Schedule POS Checkout Print Options Images Options

2. Select the client that you are scheduling the appointment for or click on the "Add Client" button to the right to add the client to your Client List.

Selecting a Client: Start typing in the name of the client to narrow down the search. This will populate names into the Client ID field. If there are similar names in your Client List, the program will narrow down the search by every additional letter you enter. You may also click on the drop down arrow in the "Client Id" field to get a drop down list of clients you may select from.

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Searching for a Client: Click on the small button (icon of two people with a magnifying glass) to the right of the Client ID field to populate the Client Search screen. This button will open a list of your clients. This screen will allow you to search for a client by their "Full Name", "Home Phone", "Client No." or "Client Card No." Click the "Add New" button to add a client to this list.

Search		Sort Order	Full Name	-	
Client No	. Client Id	Full Name	Home Phone	First Name	
>	238 CLARK SARAH	, SARAH		Sarah	
	166 ARNOLD DEBBIE	ARNOLD, DEBBIE		Debbie 🚃	
	2 BAXTER KATHERINE	BAXTER, KATHERINE	555-555-9845	Katherine	
	3 BLOOM GEORGIA	BLOOM, GEORGIA		Georgia	
	184 BOONE FRANCINE	BOONE, FRANCINE		Francine	
	114 BROWN JOHN	BROWN, JOHN		John	
	4 BROWN JULIE	BROWN, JULIE		Julie	
	5 BROWN KARRY	BROWN, KARRY	555-555-3296	Karry	
	6 CARPENTER EDWARD	CARPENTER, EDWARD		Edward	
	185 CARTWRIGHT HEATHER	CARTWRIGHT, HEATHER		Heather	
	7 CLARKE SARAH	CLARKE, SARAH		Sarah	
	9 CLAYBORNE DARCY	CLAYBORNE, DARCY		Darcy	
	10 CLAYTON MAUREEN	CLAYTON, MAUREEN		Maureen	
	11 CLEMENS JOSEPHINE	CLEMENS, JOSEPHINE		Josephine	
	12 CLEO CHARLIE	CLEO, CHARLIE		Charlie	
144 44 4 <b>F</b> F	13 CLEVELAND KAREN	CLEVELAND, KAREN		Karen 🔽	

3. Select the Client **"Retention"** Type if required. Select whether the client is a new client, a salon client, if they requested to see that employee or if they were referred.

4. Select the **"Service Id"** for the appointment you are scheduling. Click the small drop down arrow and select the service to be performed for this appointment. You may also click on the search button to the right of the Service Id field to open a list of services. You may make this list smaller by selecting a specific department.

#### Note: The Date, Time and Employee have already been selected because you have double left clicked on a specific time slot.

5. Edit the time if necessary in the **"Adjust Service Times"** fields. The time that it takes to complete the service will appear as soon as you select a service. If the client or employee needs more or less time for this service, you may edit the time before you complete the scheduling of the appointment.

6. Select a **"Resource"** if necessary. If a resource such as a Massage Room is required for this service, click the drop down arrow and select the resource from the listing. If you have selected a Resource Category for the service you have selected for this appointment, the resource field will show the selected resource category grayed out.

7. Enter your initials in the **"Booked By"** field if required. Initials of the employee that is booking the appointment may be entered into this field. This may be useful if there are any discrepancies of who booked the appointment.

- 8. Click the "Book & Save" or "Book & Add" button.
- Book & Save: This button will save the information you have entered, close this screen, and bring you back to the Appointment Schedule screen.
- Book & Add: Click this button if you would like to schedule more services for the same client. The Appointment Time will change to the next available time for the client and employee and the Service Id field will clear so that you may select an additional service.

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# **11. Transfer Gift Certificates into Envision**

If there are outstanding gift certificates that are not in Envision that you would like your clients to be able to redeem and if you would like to keep track of the remaining balances for these gift certificates in Envision, it would be best to manually enter these into the Gift Certificates list in Envision. This can be very time consuming if there are many outstanding gift certificates. If you do not wish to do this, you can use one of the "Other" payment types in the Sales Register for old gift certificates, however Envision will not be able to provide a remaining balance for these gift certificates, you will need to track this manually. Below are instructions for manually entering a gift certificate in Envision that has already been sold.

- 1. Click on "Client" on the Menu Bar of Envision.
- 2. Select "Gift Certificates" from the menu.
- 3. Click on the "New" button at the top of the list.

Purchased By     WARE KILEY     Item of a state out of a stat	Gift Certificate #		000000000000000000000000000000000000000	036524789247	Deactivate &
Starts On 1/26/2010   Expires On 1/24/2020   Original Amount 100.00 Amount Used 0.00 Fees Applied 0.00 Remaining Balance 0.01 Note  Ticket Number Date Client Number Client Id Amount Used	Purchased By		WAKE KILEY		• Reuse Card
Starts On 1/26/2010 - Indexed Client Number Client Id Amount Used 0.00 Frees Applied 0.00 Ticket Number Date Client Number Client Id Amount Used	Date Sold		1/26/2010 -		📕 Rescan Card
Driginal Amount     100.00       Amount Used     0.00       Fees Applied     0.00       Note     0.01	Starts On		1/26/2010 -		Number Number
Amount Used 0.00 Fees Applied 0.00 Remaining Balance 0.01 Note 0.00 Ticket Number Date Client Number Client Id Amount Used	Expires On		1/24/2020 -		
Fees Applied     0.00     Remaining Balance     0.01       Note     Image: Client Number     Image: Client Number     Image: Client Number	Driginal Amount		100.00		
Note	Amount Used		0.00		
	Fees Applied		0.00	Remaining Balance	0.01
	Note				
≺No data to display>					
	Ticket Number	Date	Client Number	Client Id	Amount Used

4. Enter the gift certificate number or gift card number into the "Gift Certificate #" field. After entering this number and clicking in another field, zeros will be add to the front of the number, this is normal and should not be changed.

5. Select from your Client List the **"Purchased By"** client. This is the client that paid for the gift certificate.

6. If you know the original date that the gift certificate was sold on, select the **"Date Sold"**. If not, select today's date.

- 7. Edit the "Starts On" and "Expires On" date if necessary.
- 8. Enter the "Original Amount" that the gift certificate was purchased for.
- 9. If the gift certificate has already been used before, enter the amount into the "Amount Used" field.
- 10. Enter a "Note" if necessary.
- 11. Click the **"Save"** button on the right.

# **12. Setup Lead Source List**

Setting up your list of Lead Sources is necessary for entering new clients into the program. The Lead Source is how the client has heard of you. When adding a client, it is best to ask how they heard of you so that you can select their Lead Source when adding the client. This will allow you to run Lead Source Analysis reports to find out which types of advertising are working the best and which ones might not be necessary. You can also find out how many clients came from a specific Lead Source and how much money they spent.

1. Click on "Client" on the Menu Bar of Envision.

#### 2. Select "Lead Source List" from the menu.

📝 Lead Source List	🔚 Save 🛛 🗶 Delete 🛛 ኛ Options 🗸 🕕 Exit
Lead Source	/ Monthly Budget
	Click here to add a new Lead Source
CUSTOMER REFERRAL	0.00
EMPLOYEE REFERRAL	0.00
INTERNET	0.00
NEWSPAPER	150.00
RADIO	0.00
REFERRAL	0.00
WALK-IN	0.00
YELLOW PAGES	0.00

#### 3. Click in the row labeled "Click here to add a new Lead Source".

4. Enter the name of the Lead Source in the "Lead Source" field.

5. Enter the amount of money you normally spend per month on this type of advertising in the "Monthly Budget" field.

6. Click the "Save" button at the top of this screen.

### 13. Physical Count – Count Retail

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Before you start to sell retail in Envision, you will need to perform a Physical Count of all your retail products so that the program has an accurate count of how many products you currently have. You can enter the "Qty On Hand" when you are setting up your list of retail products, however if you are currently selling those retail products while setting up the program, you will need to recount them before you start using the Sales Register in Envision. Once the first count has been completed, the system will automatically deduct the amount sold from the "Qty On Hand" each time an item is sold and the quantity will increase each time a Purchase Order is received. Even though the program will automatically reduce and increase the quantity of your retail products, it is still a good idea to perform a Physical Count every month or every three months to ensure that the program has an accurate count.

1. Click on "Inventory" on the Menu Bar of Envision.

#### 2. Select "Physical Count - Manual Adjustment Screen" from the menu.

	🦉 Physic	al Count - Manual Adjustment 9	Screen			Actions	• 🕩 E	xit
C	)rag a colum	n header here to group by that colu	imn					<b>^</b>
	Item #	Item Description	Barcode	Department	Manufacturer	Stated Qty	Actual Qty	
>	9321	RDK ALL SOFT SHAM 10.10Z/CON		RDK - SHAMPOO	REDKEN LABORATORIE	6		0
	9234	RDK ROUGH PASTE STORE INTRO		RDK - STYLING	REDKEN LABORATORIE	5		0 🗐
	9233	RDK ROUGH PASTE SALON INTRO		RDK - STYLING	REDKEN LABORATORIE	6		0
	9217	RDK ALL SOFT ADDICTIVE SALON		RDK - SHAMPOO	REDKEN LABORATORIE	3		0
	9184	RDK ALL SOFT SHAM/HEAVY CREA	743877099400	RDK - SHAMPOO	REDKEN LABORATORIE	2		0
	9183	RDK ALL SOFT HEAVY CREAM MDS		RDK - SHAMPOO	REDKEN LABORATORIE	5		0
	9180	RDK ALL SOFT HEAVY CREAM INT		RDK - SHAMPOO	REDKEN LABORATORIE	4		0

3. Click on the "Actions" button in the upper right hand corner and select "Print Item Count Worksheet" from the menu.

4. Select the preferred options and click the "**Print**" button to print a worksheet that can be used to write down how many products you have for each item listed.

5. On the **"Physical Count - Manual Adjustment Screen"**, enter the correct quantity for each item under the **"Actual Qty"** column.

Actual Qty: You will only need to enter a number in this field if the quantity you counted is different than the "Stated Qty". If you need to change the "Stated Qty" to zero, enter a negative amount of the "Stated Qty" into the "Actual Qty" field. This will bring the amount to zero when you update the list.

6. After entering the "Actual Qty" for each item that needs to be edited, click the "Actions" button again and select "Update Inventory Quantities".

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