



## **SSBC Level System Setup Guide**

# Table of Contents

<b>Part I Introduction</b>	<b>1</b>
<b>Part II Step I: SSBC Service Settings</b>	<b>1</b>
1 1. Select a Service Type for your Services .....	1
2 2. Reset Inventory Service Types .....	2
3 3. Enter Service Price Levels .....	3
4 4. Setup Service Packages .....	4
<b>Part III Step II: Enter Goals by Service Provider Type</b>	<b>6</b>
1 1. View or Edit Standard Plan .....	6
2 2. Update Employees .....	7
<b>Part IV Step III: SSBC Level Employee Settings</b>	<b>8</b>
1 1. Select Service Price Level - Other Tab .....	8
2 2. Select Employee Goal Preferences - Other Tab .....	8
3 3. Setting the Front Desk Operator .....	9
<b>Part V Step IV: SSBC Level Commission Plan</b>	<b>10</b>
1 1. Set Service Commission Options - Service Commission Tab .....	10
2 2. Set Retail Commission Options - Retail Commission Tab .....	11
3 3. Set Employee Payroll Commission Plan - Payroll Tab .....	12
<b>Part VI Notes</b>	<b>13</b>
<b>Index</b>	<b>0</b>

# Introduction

When Envision is enabled with SSBC Level System Reporting, you are able to generate reports that contain required information for SSBC. To accurately use Envision with SSBC Level System Reporting, Envision must be setup with the key information. Follow these Step-by-Step instructions to accurately setup Envision for SSBC Level System Reporting.

## Step I: SSBC Service Settings

When entering services you must select a Service Type and you must also set your different price levels for the service you are entering.

### 1. Select a Service Type for your Services

The Service Type must be set for each of your services so that SSBC reports can be generated with accurate information about the services you have sold.

1. To select Service Types for your services, click on **"Inventory"** on the Menu bar of Envision
2. Select **"Services"** from the drop down menu.
3. Click on the **"New"** button on the List Tool Bar if you are adding a new service or double click (left click) on top of a service to select the Service Type for a service that has already been entered.

The screenshot shows the Envision software interface for editing a service. The service name is "ALL OVER COLOR" with item number 74. The "Service Type" dropdown menu is open, showing a list of options. The "Service Pricing Table" is also visible, showing levels 1 through 10 with corresponding prices.

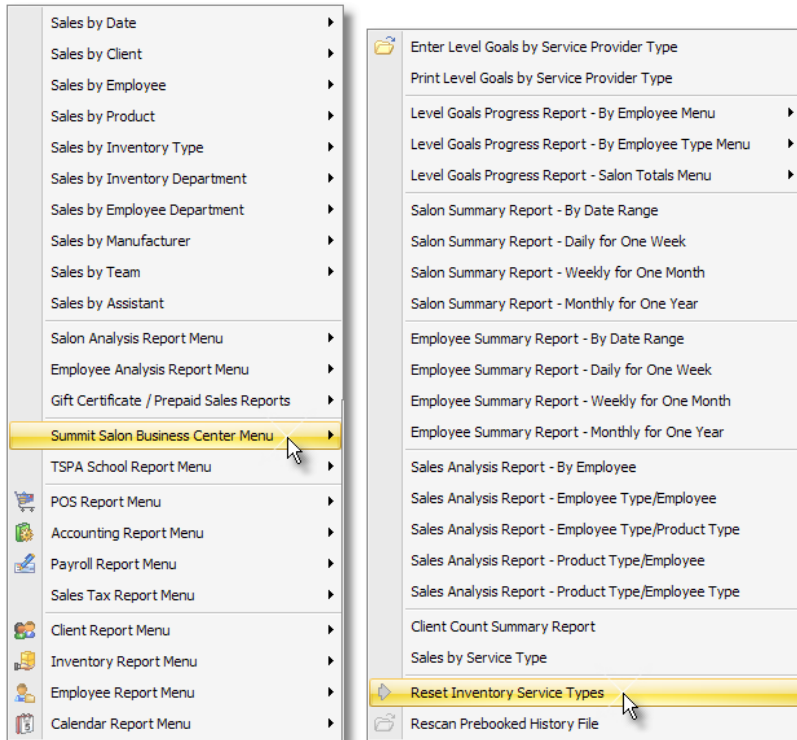
Level	Price
Level 1	
Level 2	
Level 3	
Level 4	
Level 5	90.00
Level 10	0.00

4. The Service Type selection is located below **"1st Resource"** and above **"Web URL"**, as shown in the image above. Click on the drop down arrow to select a **"Service Type"** from the drop down menu as shown in the above image.

## 2. Reset Inventory Service Types

The Reset Inventory Service Types option is used to update your sales history if you make changes to the SSBC Service Types in the Service File AFTER you have been using Envision to sell inventory (service and retail).

1. To reach this option, click on **“Reports”** on the Menu bar of Envision.
2. Click on the **“Summit Salon Business Center Menu”** on the Reports menu.
3. Select **“Reset Inventory Service Types”** from the menu that appears to the right.



4. Click the **“Yes”** button to update the Service Type Codes.

### 3. Enter Service Price Levels

Below are instructions for entering the different Service Price Levels for each of your services,

1. Click on **"Inventory"** on the Menu Bar of Envision
2. Select **"Services"** from the menu.
3. Click the **"New"** button at the top of the list if you are adding a new service or you can double click (left click) on top of a service in the list to edit it.

The screenshot shows the 'Services' management window in Envision. The 'Item Id' is 'ALL OVER COLOR' and the 'Item #' is '74'. The 'Service Pricing Table' is visible, showing 10 pricing levels. The 'Service Type' is 'HAIR - CHEMICAL'. The 'Product / Service Required again' is set to 'in 42 days'. The 'Service Pricing Table' is as follows:

Level	Price	Level	Price
Level 1	70.00	Level 6	95.00
Level 2	75.00	Level 7	65.00
Level 3	80.00	Level 8	0.00
Level 4	85.00	Level 9	0.00
Level 5	90.00	Level 10	0.00

#### Service Pricing Table

Service Pricing Table			
Level	Price	Level	Price
Level 1	70.00	Level 6	95.00
Level 2	75.00	Level 7	65.00
Level 3	80.00	Level 8	0.00
Level 4	85.00	Level 9	0.00
Level 5	90.00	Level 10	0.00

4. Enter your different levels of pricing in the **"Service Pricing Table"**.

**Entry Level Pricing:** If you have Entry Level employees, their pricing should be entered in the "Level 7" field.

## 4. Setup Service Packages

If you are using the Pro version of Envision, you can setup a service package for combination services, like a "Color & Cut". The SSBC reports calculate a quantity of services performed for each service provider. A "Color & Cut" service should be counted as two separate services, however if you create one service in your list called "Color & Cut", the program will only be able to count this as one service. Envision's "Service Package" feature will allow you to create the combination service package so that you only have to schedule one service, but when this service is moved into the Sales Register, there will actually be two services moved over instead of one. Envision will then calculate this as two service performed instead of one. Below are instructions for creating a Service Package in Envision.

Note: The "Color" service and "Haircut" service must be created in your Services list prior to creating the Service Package.

1. Click on "**Inventory**" on the Menu Bar of Envision.
2. Select "**Services**" from the menu.
3. Click on the "**New**" button at the top of the list. The following screen will appear without any information filled in.

The screenshot shows the 'Services' setup window in Envision. The 'Item Id' field contains 'COLOR & CUT' and the 'Item #' is '9454'. The 'Description' field contains 'Color & Cut'. The 'Department' is set to 'HAIR - CHEMICAL' and the 'Class' is 'COLOR'. The 'Service Type' is also 'HAIR - CHEMICAL'. The 'Last Update On' date is '2/12/2010 11:21:56 AM'. The 'Service Pricing Table' is visible, showing levels 1 through 10 with corresponding prices. The 'Service Commission' tab is active, showing a table of pricing levels.

Service Pricing Table			
Level 1	110.00	Level 6	160.00
Level 2	120.00	Level 7	100.00
Level 3	130.00	Level 8	0.00
Level 4	140.00	Level 9	0.00
Level 5	150.00	Level 10	0.00

4. Enter a name for the Service Package in the "**Item Id**" field and the "**Description**" field. For example, "**Color & Cut**".
5. Select a "**Department**" and a "**Class**".
6. Select the "**Hair - Chemical**" Service Type from the drop down menu.
7. Enter your different levels of pricing into the Level fields. The price entered here should be the price for both services.

8. Click on the "Scheduling Options" tab.

The screenshot shows the 'Services' application window. The 'Scheduling Options' tab is selected. The 'Item Id' is 'COLOR & CUT' and the 'Item #' is '9454'. The 'Description' is 'Color & Cut'. The 'Department' is 'HAIR - CHEMICAL' and the 'Class' is 'COLOR'. The '1st Resource' is empty. The 'Service Type' is 'HAIR - CHEMICAL'. The 'Web URL' is empty. The 'Product / Service Required again' is set to 'in 0 days'. The 'Last Sale On' is empty and the 'Last Update On' is '2/12/2010 11:21:56 AM'. The 'Scheduling Options' section includes a table for 'Edit Service Time Options (HH:MM)' with columns for 'Initial / Setup', 'Process', and 'Complete', each with a dropdown menu. There are also checkboxes for 'Enable Service for Online Booking', 'Require Resource Selection', 'Skin Test Required', and 'Formula Required'. The 'Starting Color on Calendar' and 'Ending Color on Calendar' are set to empty dropdown menus.

9. Enter the time that it takes to apply the color into the "Initial / Setup" field.

10. Enter the time that it takes for processing into the "Process" field.

11. Enter the time that it will take for the haircut into the "Complete" field.

12. Click the "Service Package" tab at the top of the screen.

The screenshot shows the 'Services' application window with the 'Service Package' tab selected. The 'Item Id' is 'COLOR & CUT' and the 'Item #' is '9454'. The 'Description' is 'Color & Cut'. The 'Department' is 'HAIR - CHEMICAL' and the 'Class' is 'COLOR'. The '1st Resource' is empty. The 'Service Type' is 'HAIR - CHEMICAL'. The 'Web URL' is empty. The 'Product / Service Required again' is set to 'in 0 days'. The 'Last Sale On' is empty and the 'Last Update On' is '2/12/2010 11:21:56 AM'. The 'Service Package' section includes a table with columns for 'Service Id' and 'Click here to add a new row'. The table contains two rows: 'ALL OVER COLOR' and 'WOMEN'S HAIRCUT'. There are also buttons for 'Save', 'Save & New', and 'Cancel'.

13. To add services 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 service from your list of services. Select your "Color" service from your list of services.

14. After selecting the first service, click in the blank row directly below the row where the first service is selected. The first service will move to the second row and you will be able to add an additional service by clicking in the field labeled "Click here to add a new row". Select your "Haircut" service from your list of services.

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

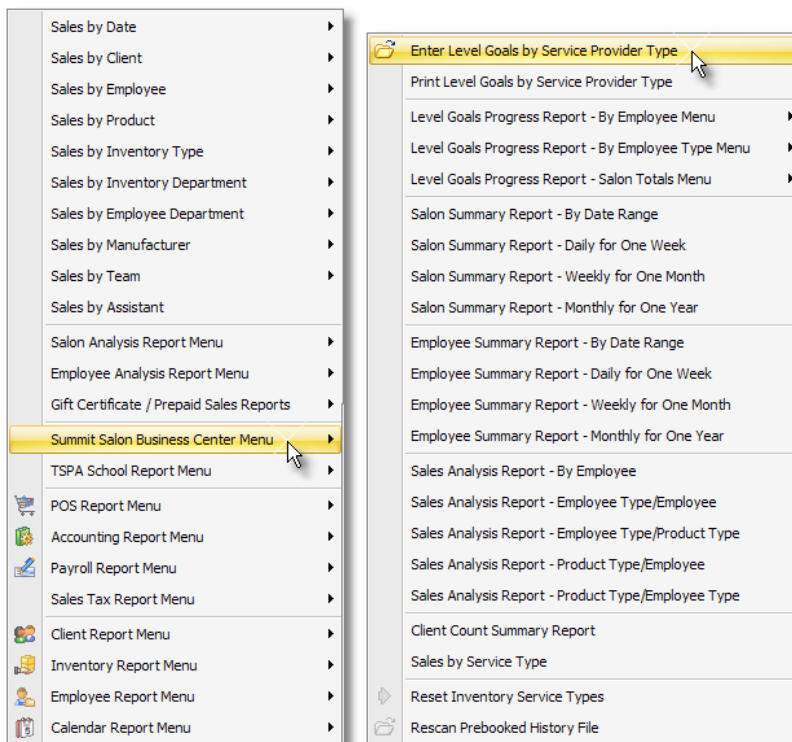
**Combination Services without Pro Version:** If you are not using the Pro version of Envision, it would be best to schedule a "Color & Cut" as two separate services in the calendar. If you are using the processing time for the Color service, enter the "Initial" time and the "Process" time and leave the "Completion" time set to zero. You will be scheduling the Haircut service in place of the Completion time. When you check a client out from the Calendar, both services will be moved into the Sales Register.

## Step II: Enter Goals by Service Provider Type

Target goals must be entered into the system for Envision to generate accurate information for SSBC Level System Reporting. The Standard Plan has already been entered into the system with standard target goals. The goals that are entered in this plan are guidelines for you to use when setting up SSBC Goals. The numbers that have been set for the Standard Plan may not be goals that your employees are capable of reaching or your employees may be capable of higher goals. You may use the Standard Plan with the goals that have been set or you may change these goals to fit the capabilities of your business. You may also create a new plan with your own target goals and leave the Standard Plan as a guideline plan that you may refer back to.

### 1. View or Edit Standard Plan

1. To enter your employees' target goals, click on **"Reports"** on the Menu bar of Envision.
2. Click on the **"SSBC Consulting Menu"** on the Reports Menu.
3. Select **"Enter Goals by Service Provider Type"** from the menu that appears on the right.



The following list will appear:

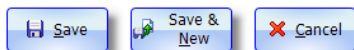
Enter Level Goals by Service Provider Type		
Description	Updated On	Updated By
PART TIME PLAN	2/10/2010 5:39:01	ADMIN
STANDARD PLAN	2/10/2010 5:39:03	ADMIN

4. Double click on the **"Standard Plan"** to open this plan or click the **"New"** button on the List Tool Bar to create a new plan. If you are not sure of what to enter for a new plan, it would be best to open the Standard Plan to view what the standard target goals are for each Employee Type / Level Class. The following screen will appear when you open the Standard Plan:

5. Click on the **"Employee Type / Level Class"** on the left to switch to a different set of goals for the Employee Type / Level Class selected.

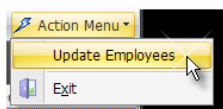
6. The **"Target Goals"** displayed on the right are for the Employee Type / Level Class that is highlighted on the left. You may change the numbers entered for the target goals on the right if they are not goals that the Employee Type / Level Class (selected on the left) will be able to meet. Enter your own target goals for the Employee Type / Level Class selected if you are creating a new plan.

7. When you have entered all of your employees' target goals for all of their specific levels, you may click on the **"Save"** button on the right side of this screen to save the changes you have made to the Standard Plan or to save a new plan. You may also create multiple plans if needed. Click the **"Save & New"** button to save the changes you have made and open a new plan.



## 2. Update Employees

If all of your employees will be under the same plan, click on the **"Actions"** button in the upper right hand corner of the **"Enter Level Goals by Service Provider Type"** list. Select the **"Update Employees"** option in the upper right hand corner of this screen when you are ready to assign this plan to ALL of your employees. If the majority of your employees will be under this plan, select this option and then edit the Plan Type for the employees that are not under this plan.



## Step III: SSBC Level Employee Settings

When entering your employees' information into Envision, you must set a Service Price Level for each employee as well a Plan Type, Employee Type, and Level for each employee.

### 1. Select Service Price Level - Other Tab

Envision allows you to set up to 10 different price levels for each Service. You will need to assign a service price level to each employee. This allows you to charge the client a different price for the same service depending upon who performs the work. This method simplifies setting up your service prices. As you add / hire new employees, you only need to set their appropriate price level and Envision will automatically charge the correct service price according to the level selected for each employee.

1. To enter a Service Price Level for each employee, click on **"Employee"** on the Menu bar of Envision.
2. Select the **"Employee List"** from the menu.
3. Click the **"New"** button on the List Tool Bar if you are adding the employee to the list or the **"Edit"** button if the employee has already been added to the system.
4. Click on the **"Other"** tab to select the Service Price Level for this employee. The Service Price Level setting is located in the middle of the screen as shown in the image below.

Service Price Level

Level 1       Level 4A       Level 9  
 Level 2       Level 4AA       Level 10  
 Level 3       Entry Level  
 Level 4       Level 8

### 2. Select Employee Goal Preferences - Other Tab

Address **Other** Certifications Custom Notes Messages Qualified Services Payroll

Employee Type: [Dropdown]

Birthdate: [Dropdown]

Date Started: 1/7/2010 [Dropdown]

Terminated On: [Dropdown]

Set New Password: [Text Box]

Security Level: [Dropdown]

ID Card: [Text Box]

Employee Client Link: [Dropdown]

Service Provider Type: [Dropdown] Stylist

Service Price Level

Level 1       Level 4A       Level 9  
 Level 2       Level 4AA       Level 10  
 Level 3       Entry Level  
 Level 4       Level 8

Employee Goal Preferences

Plan Type: [Dropdown]

Level: [Dropdown] Level 1

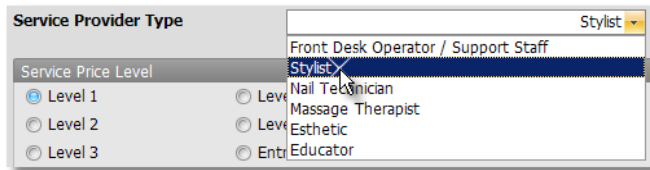
Pager Type

-- Not Selected --  
 Vibration Only  
 Numeric Only  
 Alpha Numeric

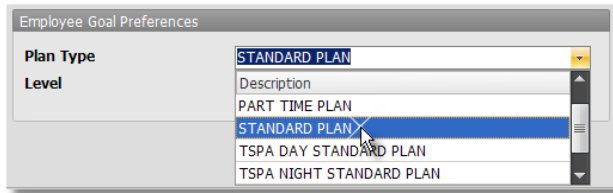
Pager Id: 0 [Dropdown]

Allow Access to Internet Site  
 Enable Internet Site Administration

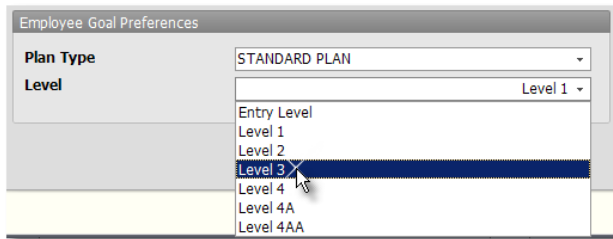
1. Select the **"Service Provider Type"** for this employee, above the **"Service Price Level"** section. You have 6 different options for Service Provider Type as shown in the above image. Select the type that applies to this employee.



2. Select the **"Plan Type"** that you have created if this has not already been set. If you have created more than one plan, select the plan that applies to this employee.



3. Select the **"Level"** that applies to this employee. The selections are 1 through 4AA as shown in the below image.



4. Click the **"Save"** button if you are finished editing your employees' records or click the **"Next"** button to move to the next employee's record in the list.

### 3. Setting the Front Desk Operator

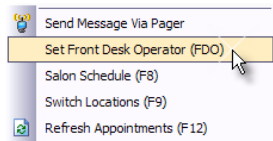
In order for Front Desk employees to receive credit for Add-On Services, it is important that the employee be set as the Front Desk Operator when using the program. If multiple Front Desk Operators are sharing a computer, they must be set as the FDO when they are using the Appointment Calendar and Sales Register.

#### Automatically Set the FDO

The Front Desk Operator can be set automatically when the employee logs in as long as you have Security enabled and the option **"Automatically Set The Front Desk Operator when Logging into Program"** checked under the Calendar Options of your Program Preferences. Click on **"Company"** on the Menu Bar of Envision, select **"Setup Program Preferences"** from the menu and click on the "Calendar Options" button on the left.

#### Manually Set the FDO

The Front Desk Operator can be set manually in the Appointment Calendar. Click the **"Actions"** button in the upper right hand corner and select the **"Set Front Desk Operator (FDO)"** option at the bottom of this menu.



## Step IV: SSBC Level Commission Plan

Envision will also allow you to calculate commission based on an SSBC Level Commission Plan. Follow the steps below for setting up an SSBC Level Commission Plan.

### 1. Set Service Commission Options - Service Commission Tab

1. To create a commission plan, click on **“Accounting”** on the Menu bar of Envision.
2. Select **“Commission Plans”** from the menu.

Commission Plan	Updated On	Updated By
ESTHETIC COMMISSION PLAN	8/20/2009 11:45:29 AM	ADMIN
MASSAGE COMMISSION PLAN	8/20/2009 11:06:01 AM	ADMIN
> NAIL TECH COMMISSION PLAN	8/20/2009 11:06:30 AM	ADMIN
STYLIST COMMISSION PLAN	11/30/2009 11:38:26 AM	ADMIN

3. If you have not yet created a commission plan, the list will be empty. Click on the **“New”** button on the List Tool Bar to create a new commission plan. The following screen will appear without any information filled in.

Service Commission | Retail Commission | Retail to Service Bonus | Manager Commission

Commission Plan Description: SSBC LEVEL COMMISSION PLAN

Service Commission Options

Plan Type: SSBC Level Commission

Service Deductions:
 

- Subtract Before Commission Calculation
- Subtract After Commission Calculation

No Commission Overrides Allowed  
 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 deductions to this percentage: 7

SSBC Level Commission Plan

Enter Commission % for each level

Entry Level /

Level 1	Level 2	Level 3	Level 4	Level 4A	Level 4AA	Level 7	Level 8
50.00	51.00	52.00	53.00	54.00	55.00		

4. Enter a name for this plan. The name can be specific to the type of plan that you are creating. You can enter an easy to recognize name in this field. This will allow you to easily select the correct plan for the employee later.

### Service Commission Plan Type

When Envision is enabled with SSBC Level System Reporting, a specific plan type called "SSBC Level Commission" has already been selected for your Service Commission plans. There is no need to select a Plan Type.

Service Commission Options

Plan Type: SSBC Level Commission

Service Deductions:

- Subtract Before Commission Calculation
- Subtract After Commission Calculation

No Commission Overrides Allowed

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 deductions to this percentage: 7

5. When you are setting up your commission plan, using the check boxes and fields provided, you can override whatever was set in Inventory for an item. When you assign this commission plan to an Employee, these settings will take precedence over any settings in Inventory. You can also add a flat charge per item or ticket as well as set all Overhead deductions to a certain percentage. It is common for Summit salons to have an Overhead Deduction Percentage of 6% or 7%. If this is the case, enter "6" or "7" into the "Set all Overhead deductions to this percentage" field.

6. If there are any costs associated with inventory items that will be deducted from the employee's commission, they can be deducted before or after the commission is calculated. "After" reduces the actual commission money the employee receives more than "Before". The most common selection is "Subtract Before Commission Calculation".

7. Enter a percentage into each level that you will be using.

**Entry Level Percentage:** The "Entry Level / Level 1" field is used for "Level 1" employees as well as "Entry Level" employees. In order to use this field for "Entry Level" employees, you will need to create a separate Commission Plan for the "Entry Level" percentage. After creating this plan, click the "Save & New" button and enter "Entry Level Commission" into the Commission Plan Description and enter the Entry Level percentage into the "Entry Level / Level 1" field.

8. Click on the "Retail Commission" tab at the top of this screen to enter your retail commission settings.

## 2. Set Retail Commission Options - Retail Commission Tab

### Retail Commission Plan Type

When Envision is enabled with SSBC Level System Reporting, a specific plan type called "Retail to Service %" has already been selected for your Retail Commission plan. There is no need to select a Plan Type for Retail Commission.

Commission Plans

Service Commission | Retail Commission | Retail to Service Bonus | Manager Commission

Retail Commission Options

Plan Type: Retail to Service %

No Commission Overrides Allowed

Exclude Service Deductions from RTS%

Exclude Tanning Sales

Exclude Gift Certificate Sales

Minimum Service Sales Required: 0

Maximum RTS Commission %: 20

Minimum RTS % Required: 0

Save, Save & New, Cancel, Next, Previous

9. Check "**Exclude Service Deductions from RTS%**" so that the Retail to Service % is not affected by deductions.
10. Check "**Exclude Tanning Sales**" if you sell any tanning items.
11. Check "**Exclude Gift Certificate Sales**" if you do not pay commission on Gift Certificates.
12. Enter "**20**" into the "**Maximum RTS Commission %**" field if you will not be paying more than 20% in retail commission.
13. Leave the "**Minimum RTS% Required**" set to zero.
14. Click the "**Save**" button if you are finished or click the "**Save & New**" button if you need to create an "**Entry Level Commission Plan**".

### 3. Set Employee Payroll Commission Plan - Payroll Tab

1. To select a commission plan for your employees, click on "**Employee**" on the Menu Bar of Envision.
2. Double click (left click) on top of an employee's name to open their record.
3. Click on the "**Payroll**" tab when entering or editing an employee's information.

The screenshot shows the 'Payroll' tab in the Envision software. The 'Commission Plan' field is highlighted with a red box and set to 'C LEVEL COMMISSION PLAN'. Other fields include 'Hourly Wage' (8.00), 'Yearly Salary' (0.00), 'Daily Booth Rental Fee' (0.00), 'POS Emp Ded Allow' (0.00), 'Employee Client Link', 'Pay Type' (Hourly), 'Employment Status' (Full Time), and 'Payroll Period' (Weekly). There are also checkboxes for 'Self Employed / Independent Contractor' and 'Booth Renter / Self Employed - Do not charge tax'.

4. Click on the drop down arrow in the "**Commission Plan**" field to select one of the Commission Plans that you have created.

The close-up screenshot shows the 'Commission Plan' dropdown menu. The options are: 'C LEVEL COMMISSION PLAN', 'Description', 'ENTRY LEVEL COMMISSION PI', and 'SSBC LEVEL COMMISSION PI'. A mouse cursor is pointing at the bottom of the dropdown.

5. Select or enter any other necessary payroll information for this employee and click the "**Save**" button on the right or click the "**Next**" button to move to the next employee's record.

