envision

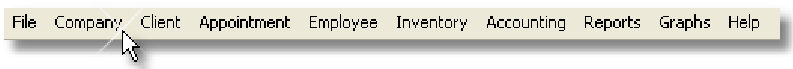
Training Guide

Setup Program Preferences

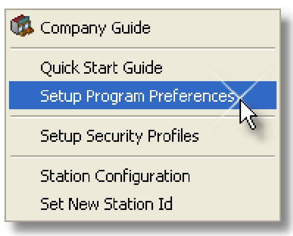
Setup Company Information

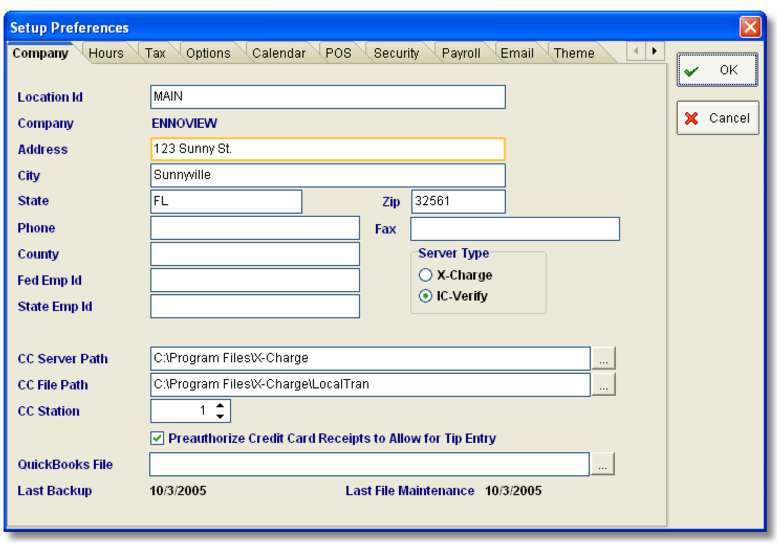
These setup screens should be completed before you start using the program. They set the operation of nearly every screen in the program. This screen is reached by selecting "Setup Program Preferences" from the "Company" menu as shown in the images below.

1. Click on "Company" on the Menu Bar at the top of the screen.



2. Select "Setup Program Preferences" from the drop down menu.





3. Setup a Location ID.

For stores with multiple locations, this field is critical as it identifies this particular store to the network server. All sales, employees, clients, etc., will be associated with this name. For single site stores, an entry is still required. Just enter an abbreviated name of your store.

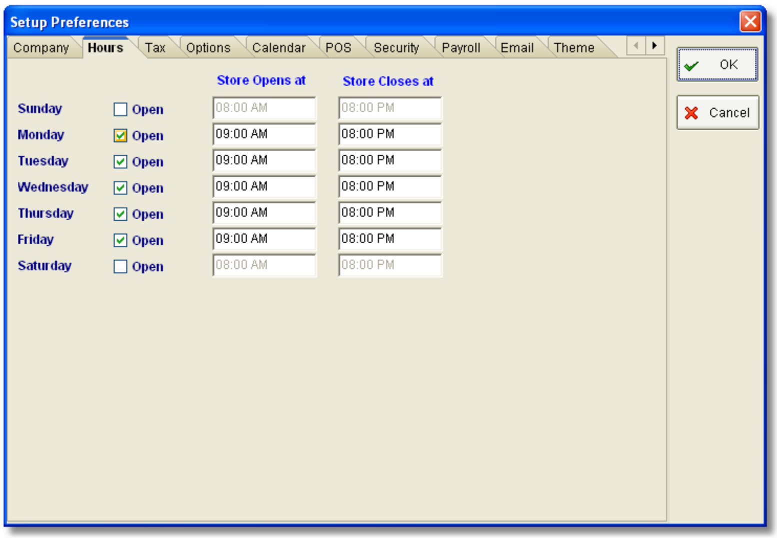
4. Enter Company Information.

Enter the company's address, city, state, zip, phone number, fax number, and county. Enter the Federal and State Employer Identification Number. The Federal and State Employer Identification Number are used on all W-2's and other federal and state income tax forms that you print.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Setup Store Hours

5. Click on the "Hours" tab.

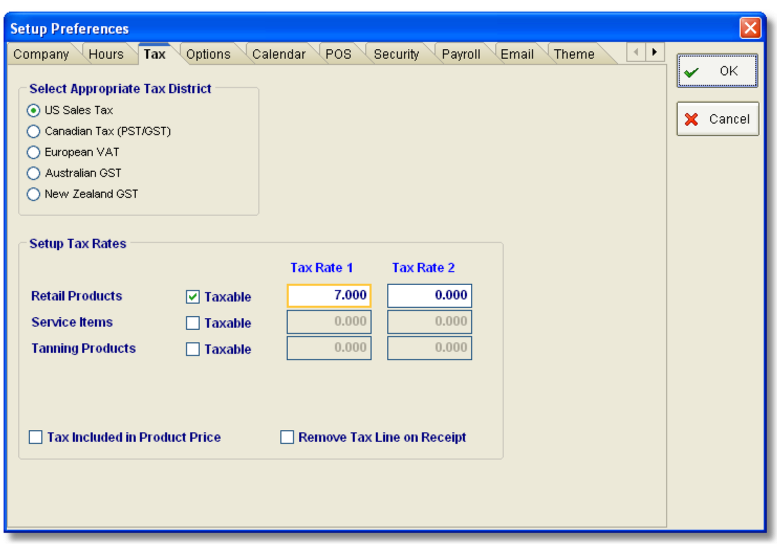


6. Enter the hours and weekdays that your store will be open on.

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.

Setup Tax Options

7. Click on the "Tax" tab.



8. Select the appropriate tax district.

Select the type of tax setup you will be using depending on the country you are in.

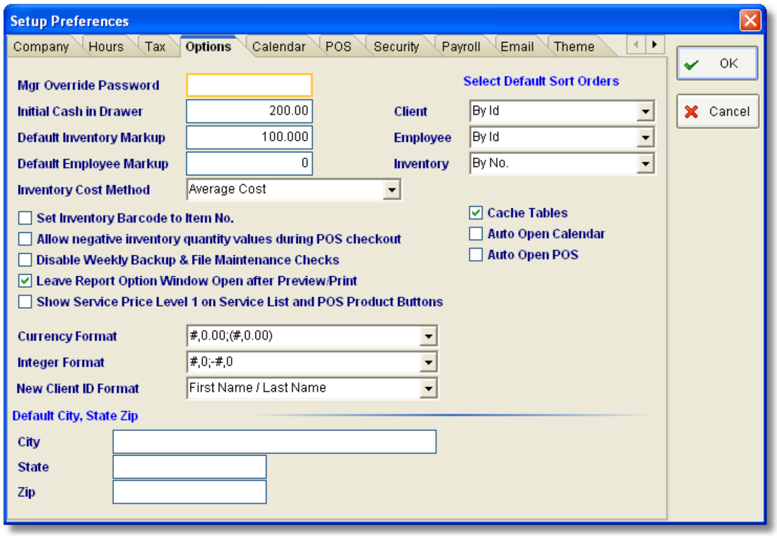
9. Enter the tax rates for the items that are taxable.

If any of these items are not taxable, do not place a check in the "Taxable" check box.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Setup Program Options

10. Click the "Options" tab.



11. Enter a Manager Override Password (optional).

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 specific features that may require a manager's approval. Setting a password is optional, however it is recommended.

12. Set the Initial Cash In Drawer.

Enter the dollar amount you start your cash drawer off with each day. This number is then used by the Zero Out (Z-Out) function of the Point Of Sale screen as a starting point. This is only a default setting and may be changed each day if you do not always start each day with the same amount of money.

13. Set the Default Inventory Markup Percent (optional).

Enter a number here that is a percent of markup that you would like used as the default when entering Inventory products. Remember, it is only a default and can be changed for particular inventory items as you enter them. Use whole numbers, for example "50" for 50%.

14. Set the New Client Id Format.

When adding a Client outside of your Client List, the Client Id can automatically be entered. The system is defaulted to enter the first initial and last name of the client, however this option will allow you to change the format of the Client Id that is automatically entered.

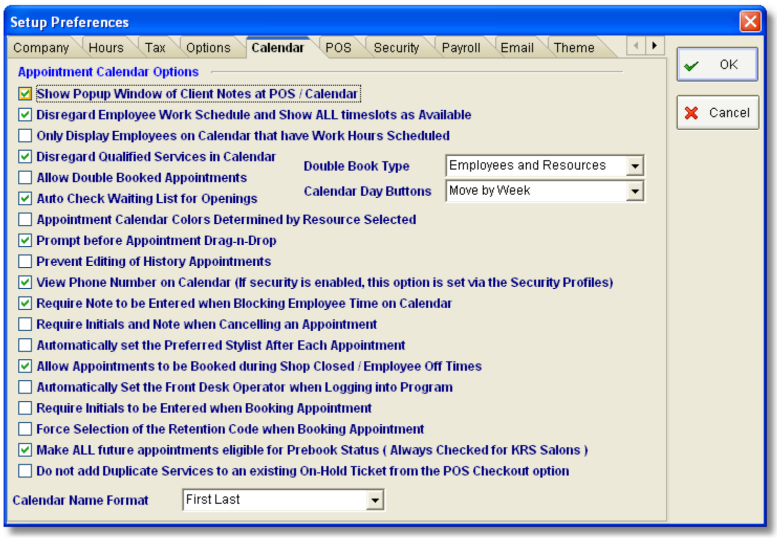
15. Select Default Sort Orders (optional).

The Client, Employee, and Inventory sort orders are automatically defaulted to ID. You may want to change this as you continue to use the software and become familiar with how to search for these items. If you have a barcode scanner, set Inventory to "Barcode".

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Setup Calendar Options

17. Click on the "Calendar" tab.

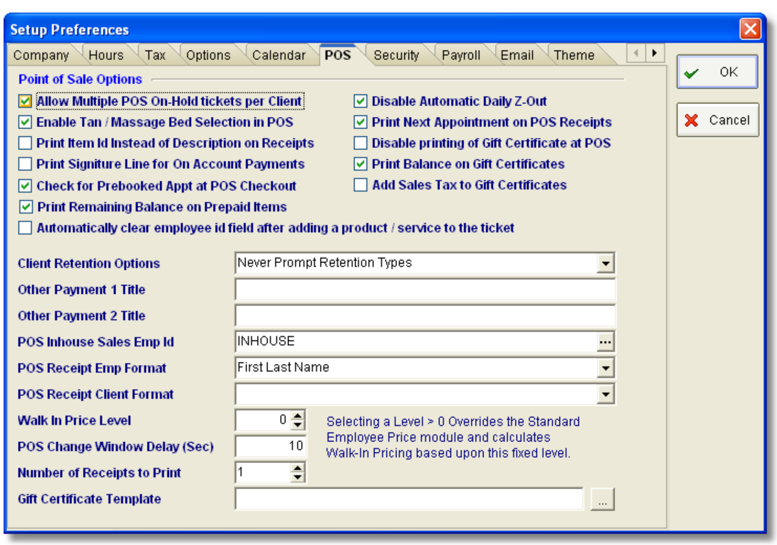


This screen allows you to set options for the way in which the Appointment Calendar will function. You may choose to change these options as you continue to use the software. There are some very important settings on this screen that you may need to refer back to if you are not satisfied with the settings of your appointment calendar.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Setup POS Options

18. Click on the "POS" tab.

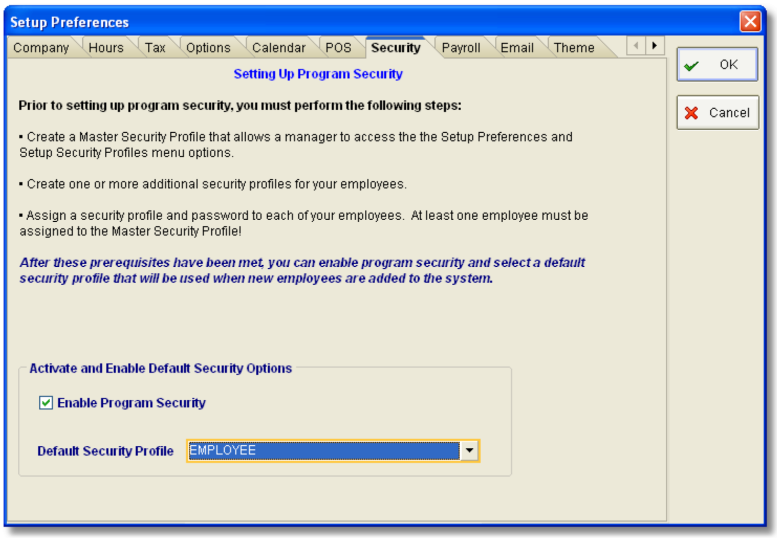


This screen allows you to set options for how the the POS window will function. These are also options that you may choose to change as you continue to use the program.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Enable Program Security

19. Click on the "Security" tab.

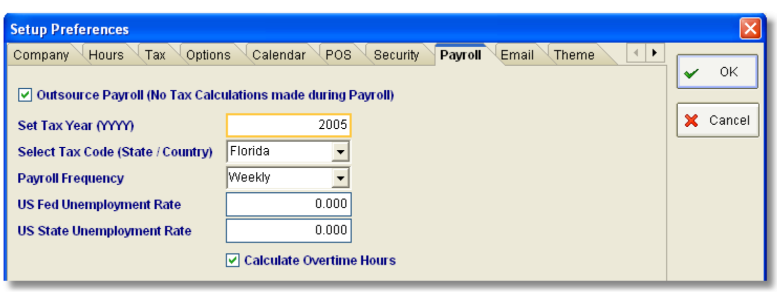


There are three parts to setting up the Program Security. First Security Profiles are created, then Passwords and Security Profiles are assigned to each employee, and last is enabling the Program Security. This is the last step of setting up the security. For instructions on setting up Security Profiles, please refer to the "Setup Program Security" section of this guide. For instructions on setting Passwords and Security Profiles for your employees, please refer to the "Employee Setup" section of this guide.

Setup Payroll Options

20. Click on the "Payroll" tab.

Note: This tab is not available in the Envision Solo or Envision Standard versions.



If you choose not to use the Payroll feature of Envision, you may place a check in the box to the left of **"Outsource Payroll"**.

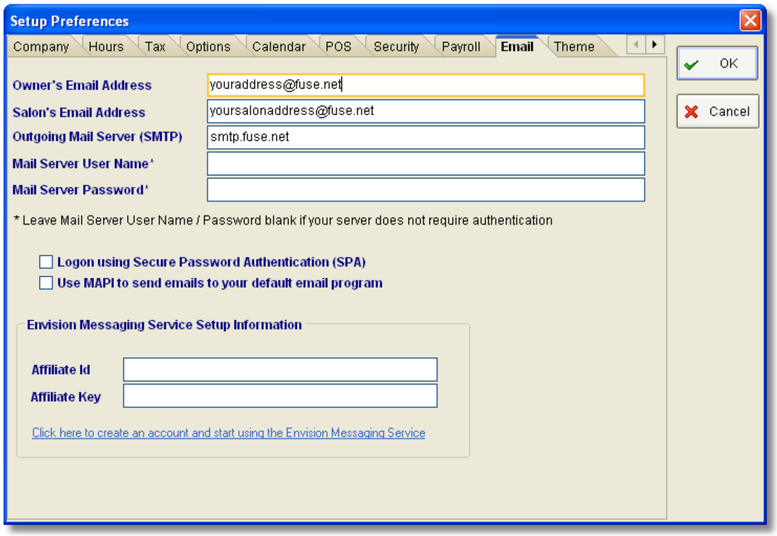
If you would like to use Envision for Payroll, you will need to set the following:

1. Set Tax Year (YYYY)
2. Select State Code (for taxes)
3. Select Payroll Frequency
4. Set Federal Unemployment Rate and State Unemployment Rate.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Setup Email

21. Click the "Email" tab.

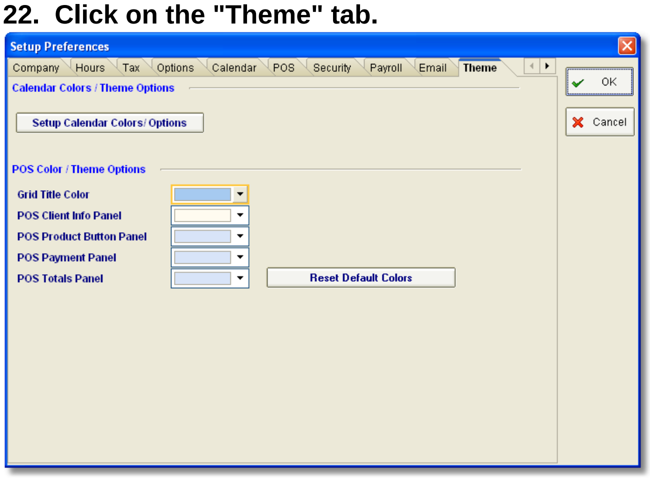


If you would like to email directly from Envision, you will need to setup your SMTP information. You will need to obtain this information from your ISP (Internet Service Provider). Enter your information according to the information provided by your ISP.

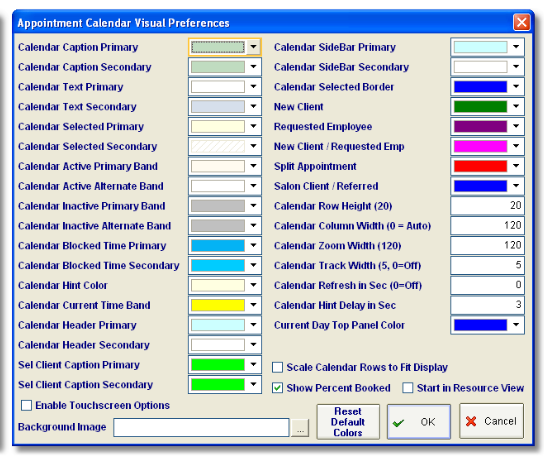
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Theme

22. Click on the "Theme" tab.



Setup Program Preferences - Theme Tab



Calendar Theme Screen

This screen will allow you to change the colors of the POS window and the Appointment Calendar. Click on the drop down arrows to select a different color.

The **"Setup Calendar Colors / Options"** button will open the "Calendar Theme Screen". This screen allows you to set display properties and colors for the Appointment Calendar.

23. Click the "Save" button to save the changes you have made to the Program Preferences.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

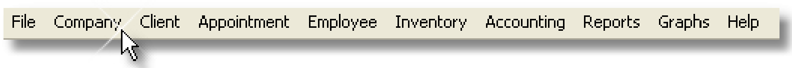
Notes

Setup Program Security

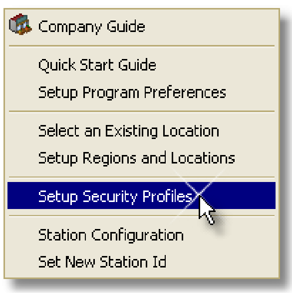
Setup Security Profiles

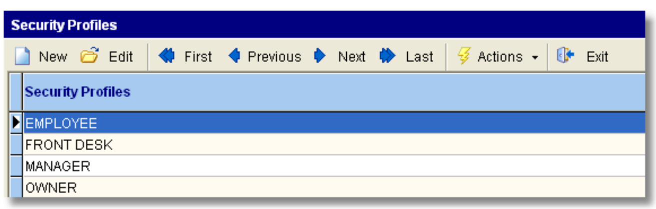
This powerful but easy to use feature of the program allows you to create security profiles. Security Profiles are then assigned to employees. Each Profile contains detailed information about what program features are accessible. You can create a Profile that allows unlimited access to all program features or one that restricts the user to very few features.

1. Click on "Company" on the Menu Bar at the top of the screen.



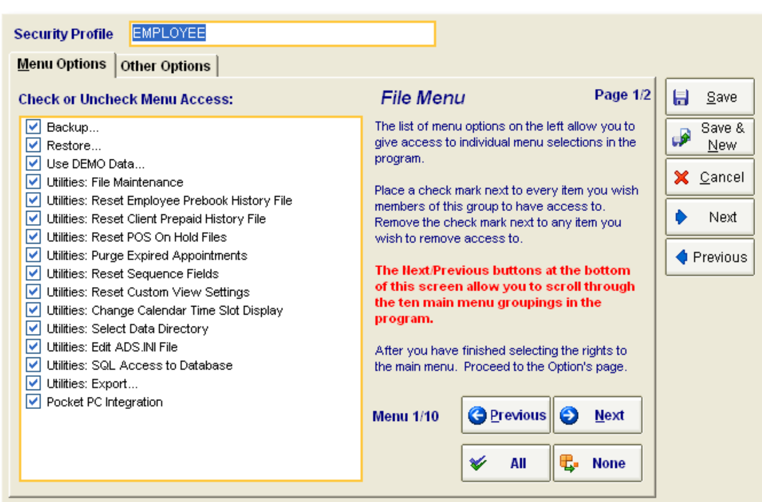
2. Select "Setup Security Profiles" from the drop down menu.





A list of Security Profiles will appear. This list may be empty if you have not yet created any Security Profiles.

3. Click on the "New" button on the Tool Bar at the top of this list to create a new Security Profile.



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

Enter a name here that best describes the type of employee that will be assigned this profile. You might want to consider using descriptive names for these profiles, such as Manager for nearly unlimited access, Owner for totally unlimited access, and Employee for very limited access.

5. Under the "Menu Options" tab, check and uncheck the items that this profile will have access to.

The "Menu Options" tab is ten separate screens of options. These screens consist of all the Main Menu options.

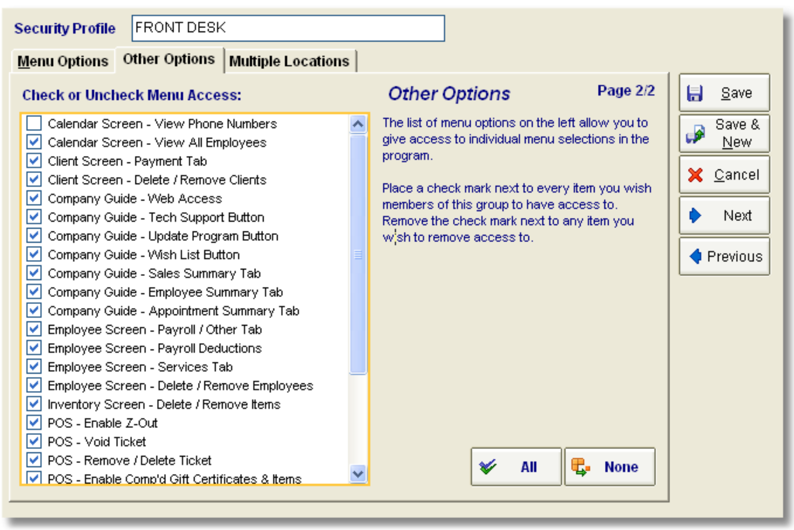
6. Click the "Next" button in the lower right hand corner to open the next screen of Menu Options.

The "Previous" and "Next" buttons will change the choices to those for the next Main Menu item or go back to the previous page.

The "All" or "None" button will check every box on the screen or remove all the check marks.

Other Options Tab

7. Click on the "Other Options" tab.



This tab contains the items that don't fall under a Main Menu choice. As you cycle through all of the Main Menu items, these items will stay the same.

8. Place a check mark next to every item you wish members of this group to have access to.

Remove the check mark next to any item you wish to remove access to.

You may also use the "All" or "None" button to check or uncheck ALL of the check boxes on this screen.

9. Click the "Save" button to save the new security profile you have created.

Note: 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. For instructions on setting Passwords and Security Profiles for your employees, please refer to the "Other Tab" under the "Employee Setup" section of this guide. For instructions on enabling the security, please refer to "Enable Program Security" under the "Setup Program Preferences" section of this guide.

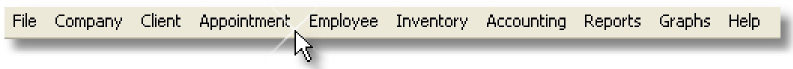
Notes

Setup Company Resources

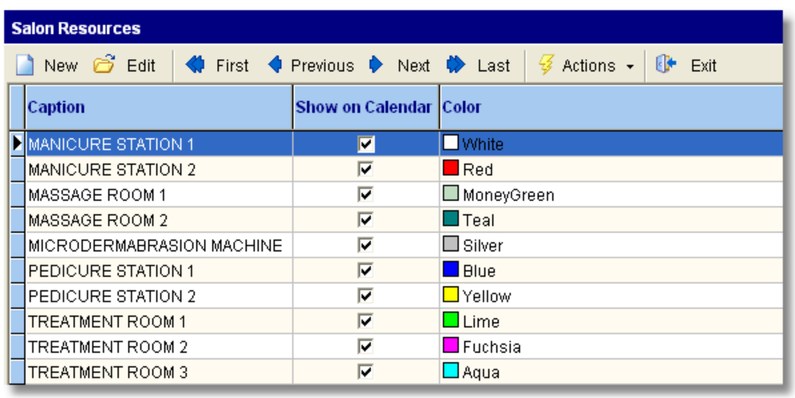
Setup Resources

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.



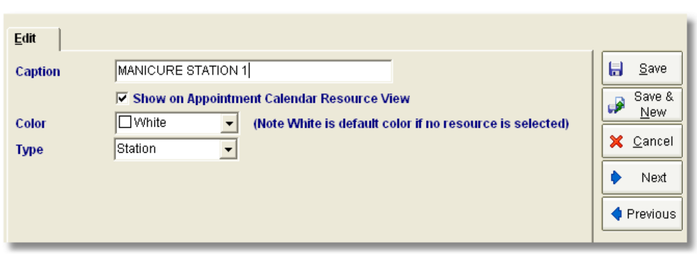
2. Select "Setup Salon Resources" from the drop down menu.



Caption	Show on Calendar	Color
MANICURE STATION 1	☑	White
MANICURE STATION 2	☑	Red
MASSAGE ROOM 1	☑	MoneyGreen
MASSAGE ROOM 2	☑	Teal
MICRODERMABRASION MACHINE	☑	Silver
PEDICURE STATION 1	☑	Blue
PEDICURE STATION 2	☑	Yellow
TREATMENT ROOM 1	☑	Lime
TREATMENT ROOM 2	☑	Fuchsia
TREATMENT ROOM 3	☑	Aqua

A list of your resources will appear. This List may be empty if you have not yet created any Salon Resources.

3. Click on the "New" button at the top of this list to create a new Salon Resource.



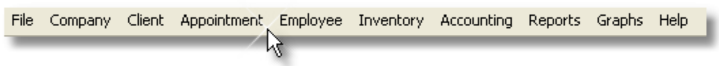
4. Enter the name of the resource in the "Caption" field.

You may also select a color for the resource and a resource type.

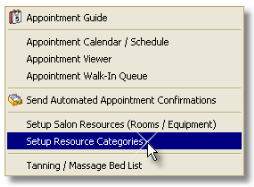
5. Click the "Save" button to add the resource to the list.

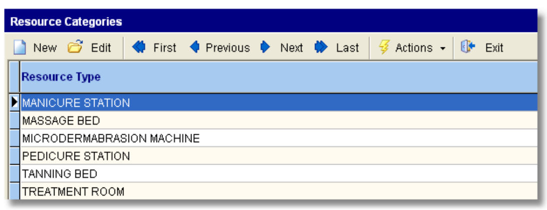
Setup Resource Categories

6. Click on "Appointment" on the Menu Bar at the top of the screen.



7. Select "Setup Resource Categories" from the drop down menu.



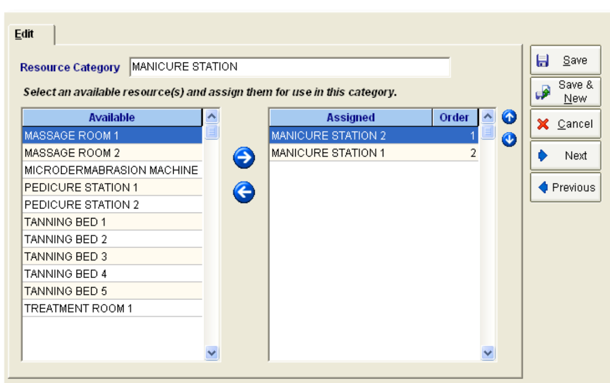


A list of your resources will appear. This list may be empty if you have not yet created any Resource Categories.

8. 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.

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



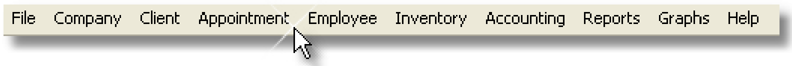
10. Move the resources for this category from the available list to the assigned list with the right arrow button in between these two lists.

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.

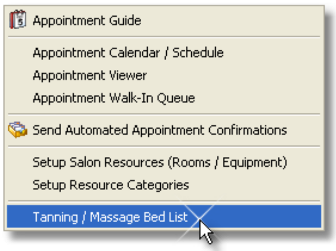
11. Click the "Save" button after assigning resources to the category to add the category to the list.

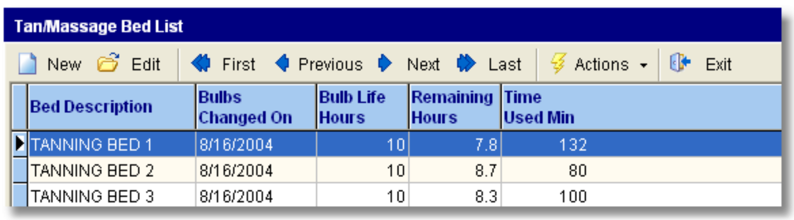
Setup Tanning Beds

1. Click on "Appointment" on the Menu Bar at the top of the screen.



2. Select "Tanning / Massage Bed List" from the drop down menu.

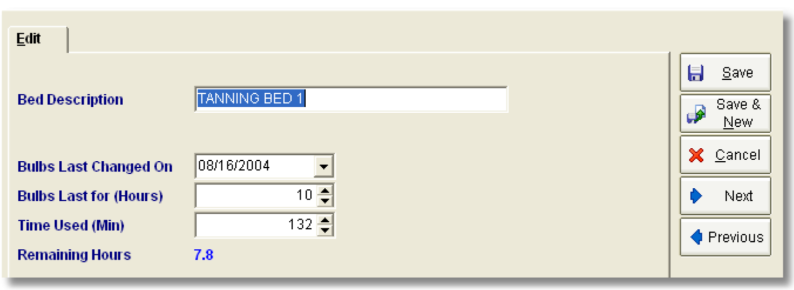




A list of your Tanning and Massage Beds will appear. This list may be empty if you have not added any items to this list.

3. Click on the "New" button to add a Tanning or Massage bed to this list.

This screen allows you to create a Tanning Bed resource for each tanning bed that you have.



4. Enter a Bed Description, a Bulbs Last Changed On date, and how long the bulbs last for (hours).

The "Time Used (Min)" will change each time you select a tanning bed at the Point of Sale.

5. Click the "Save" button on the right to add the new bed to the list.

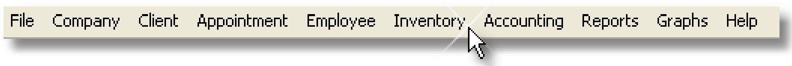
Notes

Inventory Setup

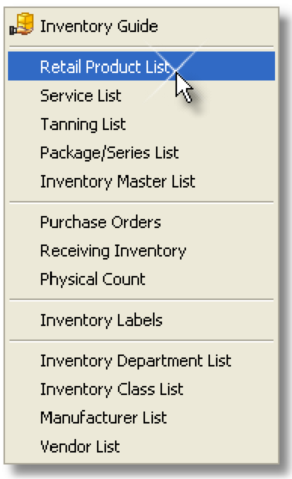
Retail Product List

The Retail Product List allows you to enter the products you sell or use as Back Bar items.

1. Click on "Inventory" on the Menu Bar at the top of the screen.



2. Select "Retail Product List" from the drop down menu.

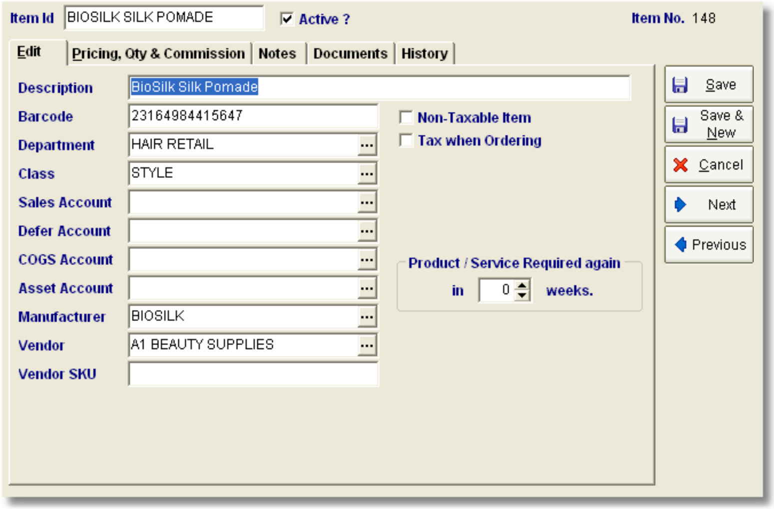


Item No.	Active	Type	Item Id	Price	Description
1527	☑	Prod	ALL SOFT HOLIDAY SPECIAL S	10.00	All Soft Holiday Special Sold Out
1528	☑	Prod	ALL SOFT POO W/MASQUE 1OZ	7.50	All Soft Poo W/Masque 1oz
1529	☑	Prod	ALL SOFT SHAM/COND DUO	12.00	All Soft Sham/Cond Duo
3479	☑	Prod	ART 100ML PERSNL MST MIX	8.24	Art 100Ml Persnl Mst Mix
2761	☑	Prod	ART 1ST TIME PREVENT KIT 7	16.50	Art 1st Time Prevent Kit 7
3480	☑	Prod	ART 200ML PERSNL MST MIXST	14.40	Art 200Ml Persnl Mst Mixstores Only
3481	☑	Prod	ART 200ML PERSNL SHAM MIXS	11.44	Art 200Ml Persnl Sham Mixstores Only
3482	☑	Prod	ART 300ML PERSNL SHAM MIXS	16.18	Art 300Ml Persnl Sham Mixstores Only

A list of your retail products will appear. This list may be empty if you have not added any products to this list.

3. Click the "New" button to add a new product to this list. You may also click the "Edit" button if you would like to edit the highlighted item.

Retail Product Edit



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

Enter the name of the retail item in this 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 Point Of Sale screen will be able to remember when searching for the item.

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

Enter the description of the item here. If this is a product, you should enter the description provided by the vendor/manufacturer. The name you enter here is what will be displayed on the inventory list and printed on Purchase Orders and reports.

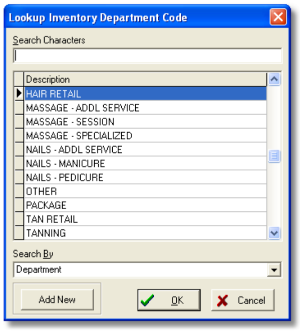
6. Scan the barcode of the product in the "Barcode" field if you have a barcode scanner.

If you have a barcode reader connected to the system you may scan the UPC code on the product and the code will be entered here automatically. If there is no barcode associated with the item, leave this field blank.

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

This field is available to further organize your inventory items. For example, if you had products that were only used by the professionals in your business, and other products you sold to clients, you might set up two departments called "Professional Products" and "Retail Products". You may setup unlimited departments. This is valuable when you are printing reports or viewing a large inventory list and only want to see for example, Retail Products.

Select the Inventory Department by clicking on the small button in the "Department" field.



Click the "Add New" button if the department needs to be entered into the Inventory Department List.

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

This field along with Department can help you organize your inventory into logical groups. Some examples of Class might be, Hair Products, Equipment, Housekeeping, etc. Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing.

9. Select Accounts for the product (optional).

Select from the drop down list which accounts this item belongs to. The accounts shown in each list are what you enter / import in the Chart of Accounts list. You create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu. The accounts are used for the QuickBooks Interface. The QuickBooks Interface is an Add-In Module available for purchase along with Envision.

10. Select or add a Manufacturer for the product.

Enter the name of the Manufacturer of the inventory item. You may want to use the name shown on the invoices as this will be printed on your Purchase Orders.

11. Select or add a Vendor for the product.

Select from the Vendor list (that you created) the Primary Vendor you use to purchase this item. This will set the default Vendor name on your Purchase Order. Of course, you can select another (secondary) vendor when you are filling out a purchase order.

12. Enter the Vendor SKU (optional).

Enter the Vendor SKU that the Primary vendor uses for this item. This item is necessary for accurate Purchase Orders.

13. Edit the Sales Tax options (optional).

Check **"Non-Taxable Item"** box if this item does not have sales tax charged on it when you sell it. Some states tax products but not services.

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 there are times when the only source for an item is for you to purchase it retail.

14. Enter the number of weeks in which this product should be purchased again (optional).

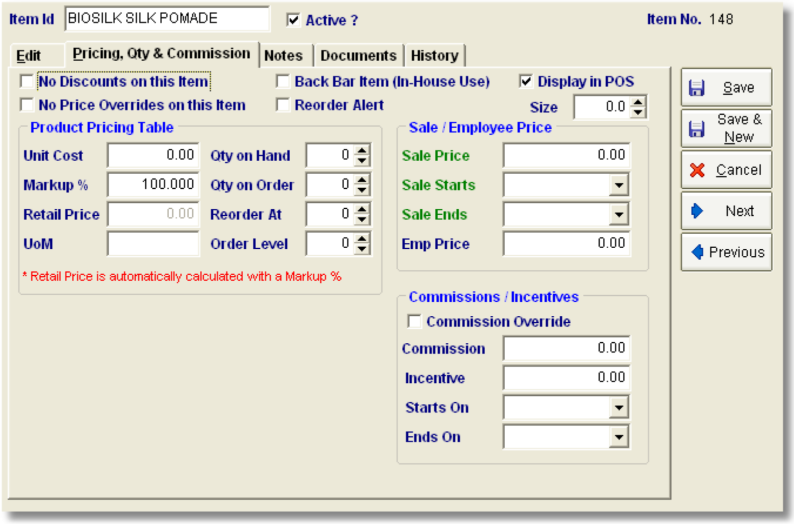
You may run the Product / Service Expiration Report to find out which clients need to purchase products again or come in for a service again. This report can be reached by clicking on "Reports" in the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

15. Click on the "Pricing, Qty & Commission" tab below the Item Id field.

Retail Item Pricing, Qty & Commission

16. Click on the "Pricing, Qty & Commission" tab below the Item Id.

The information entered into these fields refers to the Retail sale of the product, not the ordering of the product. For example, if you order shampoo by the case and sell it by the bottle, you would enter into these fields information about a single bottle.



17. Enter the "Unit Cost" of the product.

This is your cost per unit. If you pay $36 per case of 12, you would enter $3.

18. 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 calculate the "Retail Price". You can of course, enter a "Retail Price" and leave the "Markup %" blank. If you entered the "Markup %" in the Program Preferences, the "Retail Price" will be automatically entered as soon as you tab down or click in another field.

19. Enter a Unit of Measure into this field, such as "Ea" for each or OZ for ounces. This step is optional.

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

This is the physical amount of that product that you have in stock.

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

The program will maintain "Quantity on Hand and Quantity on Order" after you enter the initial values here. Filling out Purchase Orders will increase the Quantity on Order. Sales will reduce the Quantity on Hand. The "Receiving Inventory" screen is used to check items into inventory as they are delivered to your store and increase the Quantity on Hand and reduce the Quantity on Order.

22. Enter the level you wish to reach before you need to reorder this product in the "Reorder At" field.

When you create a Purchase Order, the program can scan your products to find out which products need to be reordered. If your "Qty on Hand" is below your "Reorder At", the product will be added to the Purchase Order.

23. In the "Order Level" field, enter the quantity of this item you normally reorder or leave the number zero in this field if you would like to order the difference between the "Qty on Hand" and the "Reorder At".

This will be used to automatically fill in fields when creating a Purchase Order. If the "Order Level" is zero, the difference between the "Qty on Hand" and the "Reorder At" will be the new order quantity for the product. For example, if the "Qty on Hand" for a product is 5, the "Reorder At" is 15, and the "Order Level" is zero, the new order quantity will be 10.

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

Checking these boxes prevents this item from being sold for any less than the retail price you set here. No discounts or overrides will be allowed without the **Manager Override Password**.

25. Check the "Back Bar Item" check box if this product is never sold to your clients.

Check here if this item is never for sale to clients, but used to run your business. For example, professional color products, Pine Cleaner, and Toilet Paper.

26. Check the "Reorder Alert" check box if you would like to be reminded when the product needs to be reordered.

Check this box to show an alert on the POS screen 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. It is recommended you check this box.

27. The "Sale Price", "Sale Starts" and "Sales End" fields are used for placing this item on sale. You will only need to set this information up when a product is on sale.

First, enter a "Sale Price", then enter the "Sale Starts" and "Sale Ends" dates by using the small drop down buttons to display a calendar, or enter the dates directly. The "Sale Price" you set will only be effective for the range of dates you enter. After the "Sale Ends" date is passed, the price will automatically revert to its normal price.

28. Enter an "Employee Price" for the product.

Enter an amount into "Emp Price" if you wish to give your employee's a discounted price on this item.

29. Enter a Commission Override or Incentive if necessary.

If you wish to pay a specific dollar amount instead of a commission percentage to employees that sell this product, check the "Commission Override" box and enter a dollar amount in the "Commission" field. This will override any commission percentages you may use for an employee.

If you wish to pay an "Incentive" amount for employees selling this product, enter an amount here. Normally, an incentive is offered for a limited time. Enter the "Starts On" and "Ends On" dates to set that period of time.

30. 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.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Retail Worksheet

Use this worksheet to practice entering products into the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own products into your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on the Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

Open the Retail Product List and add the following items to the list. You may enter your own departments, classes, manufacturers and vendors if you wish. Also, if you have a barcode scanner, you may scan the barcode of any product in the barcode field for practice.

1. Redken Rewind 06 Pliable Styling Paste

- Unit Cost: $8.00
- Qty: 10
- Reorder At: 5

2. Pureology Root Lift Mousse 9 Oz

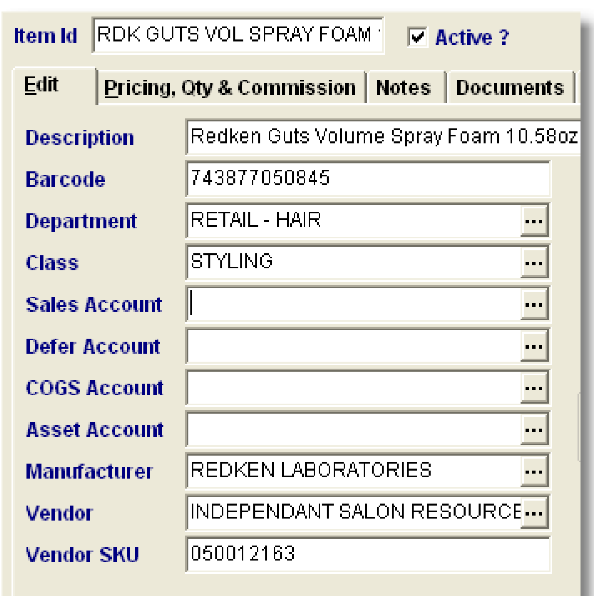
- Unit Cost: $8.00
- Qty: 15
- Reorder At: 5

3. TiGi Bed Head After Party

- Unit Cost: $8.25
- Qty: 5
- Reorder At: 2

You may use the following as an example:

Product: Redken Guts 10 Volume Spray Foam 10.58 Oz

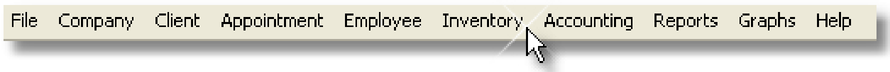


Notes

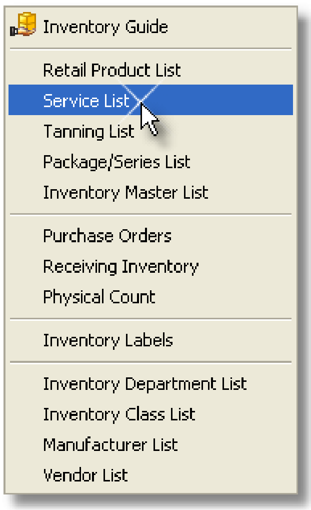
Service List

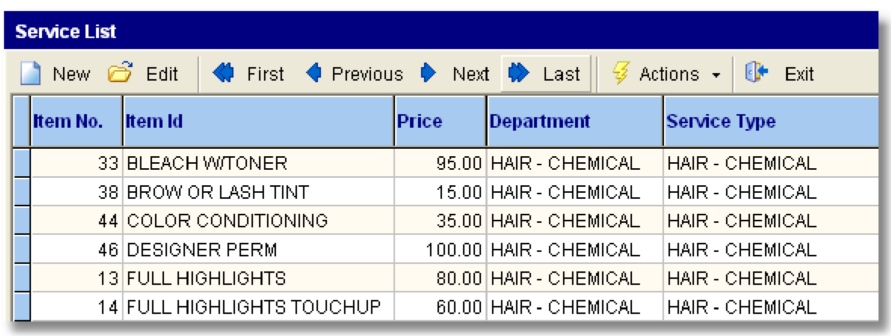
The Service List allows you to enter all the Services that your business offers.

1. Click on "Inventory" on the Menu Bar at the top of the screen.



2. Select "Service List" from the drop down menu.



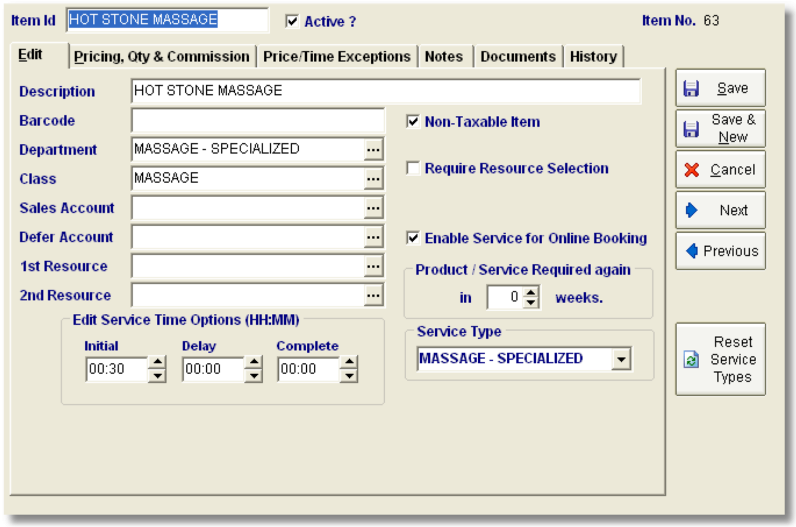


Item No.	Item Id	Price	Department	Service Type
33	BLEACH W/TONER	95.00	HAIR - CHEMICAL	HAIR - CHEMICAL
38	BROW OR LASH TINT	15.00	HAIR - CHEMICAL	HAIR - CHEMICAL
44	COLOR CONDITIONING	35.00	HAIR - CHEMICAL	HAIR - CHEMICAL
46	DESIGNER PERM	100.00	HAIR - CHEMICAL	HAIR - CHEMICAL
13	FULL HIGHLIGHTS	80.00	HAIR - CHEMICAL	HAIR - CHEMICAL
14	FULL HIGHLIGHTS TOUCHUP	60.00	HAIR - CHEMICAL	HAIR - CHEMICAL

A list of your services will appear. This list may be empty if you have not added any services to this list.

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.

Service Item Edit



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 Point Of Sale screen will be able to remember when searching for the item.

5. Enter a description in the "Description" field.

Enter the plain language description you wish here. The name you enter here is what will be displayed on the inventory list, Point of Sale 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.

Select from the drop down list the Department this item belongs in. You may create a Department "On the Fly" if you wish by clicking the "Add New" button when the list of Departments screen appears.

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

Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing. Select from the drop down list the class of service this item belongs to. As with Department you may create a new Class when the list screen appears.

9. Select Accounts for the service (optional).

Select from the drop down list the account this item belongs to. You create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu. The accounts are used for the QuickBooks Interface. The QuickBooks Interface is an Add-In Module available for purchase along with Envision.

10. Select the required resources for the service you are adding.

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

11. Enter the amount of time it takes to complete the service.

The three items in this area of the screen are described below:

Initial time for Service: All service items need this entered. It is the best estimate of the time to perform the service. Use 15-minute increments only for example 01:15 for 1hour and 15 minutes, or 00:30 for 30 minutes. For most service items this is the only time needed.

Delay between Service: Enter a time (once again 15 minute increments only) here if a delay is required during this service. For example, if you apply the Perm chemicals and must wait 30 minutes before you wash, rinse, and style. If you enter a time here you must enter a "Completion Time".

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

12. Edit the tax options (optional).

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services. If you did not check the "taxable" check box for service items in the Program Preferences on the "Tax" tab, it is not necessary to check this box.

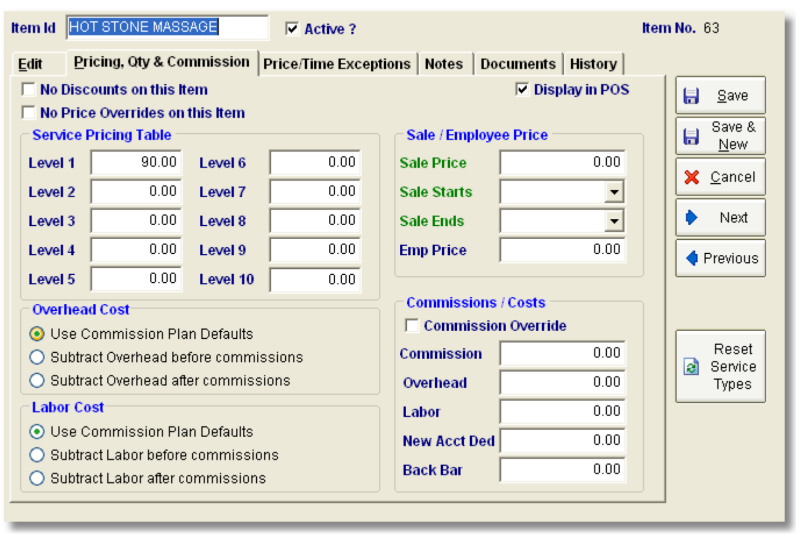
13. Enter the number of weeks in which this service should be performed again (optional).

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" in the Menu Bar, selecting the Client Report Menu followed by the Product / Service Expiration Report.

14. Click on the "Pricing, Qty & Commission" tab below the Item Id field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Service Item Pricing, Qty & Commission



15. 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.

The purpose of having different levels of pricing is to pay more for a service (for example a Hair Styling) performed by a more experienced employee. On the employee screens you set for each employee what their level is. In these fields you set how much will be charged for that service for each level employee.

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 any sale at the POS).

16. Enter an amount into the "Emp Price" field if you would like to give your employee's a discounted price on this item.

When setting up the program, it may be best to enter Employee Prices when you enter your services so that you do not have to return to these screens to enter an Employee Price for each service. You may not use the Sale Price until a later time, if the item is ever on sale.

17. 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).

These 4 fields allow you to enter Overrides for the various items shown. If you check the "Commission Override" box you must enter an amount into the "Commission" field directly below it. The check box and the field act together. The "Overhead" and "Labor" fields are associated with the "Overhead Cost" and "Labor Cost" choices. Enter a dollar amount into either or both of the "Overhead" or "Labor" fields. If you wish to retain a small amount of money from the employee's commission each time this item is sold, check these boxes. Often shop owners will do this to offset their Overhead or Labor or both. Considering that the shop provides the A/C, Lights, and power for the employee's machinery, and often times provides cleaning service, and general store maintenance labor, this is a common practice. The "New Acct Ded" 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.

Note: Please refer to the Accounting section of this guide for more information on setting up commission plans.

18. 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.

Note: Please refer to the Accounting section of this guide for more information on setting up commission plans.

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

Checking these boxes prevents this item from being sold for any less than the retail price you set here. No discounts or overrides will be allowed without the **Manager Override Password**.

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.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Service Worksheet

Use this worksheet to practice entering services into the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own services into your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on the Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

Open the Service List and add the following items to the list. You may enter your own departments and classes if you wish.

1. Spa Manicure

- Department: SERVICE - NAIL
- Class: MANICURE
- Resource: MANICURE STATION
- Time to Complete Service: 1 Hour
- Level 1 Price: $45

2. 1 Hour Massage

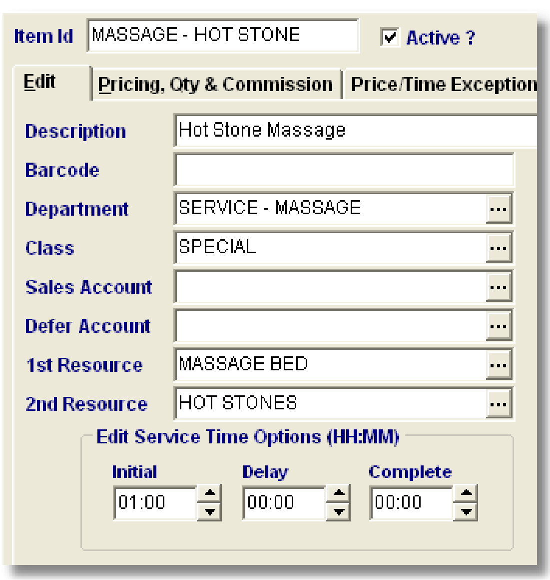
- Department: SERVICE - MASSAGE
- Class: SESSION
- Resource: MASSAGE BED
- Time to Complete Service: 1 Hour
- Level 1 Price: $75

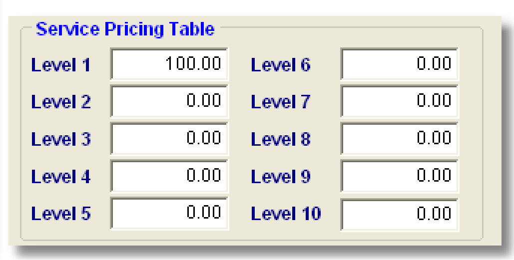
3. Full Highlights

- Department: SERVICE - HAIR
- Class: Color
- Time to Complete Service: Initial - 30 Minutes, Delay - 45 Minutes, Complete - 30 Minutes
- Level 1 Price: $80

You may use the following as an example:

Service: Women's Haircut



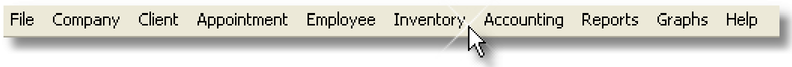


Notes

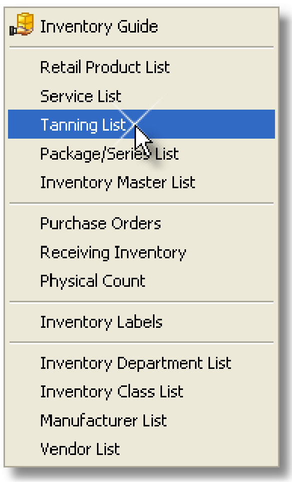
Tanning List

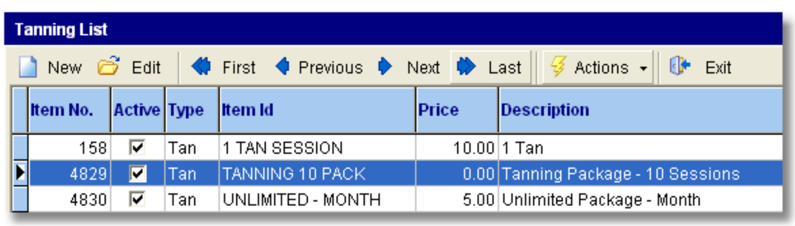
The Tanning List allows you to enter tanning sessions and tanning packages. The program will keep track of sessions used in Packages.

1. Click on "Inventory" in the Menu Bar at the top of the screen.



2. Select "Tanning List" from the drop down menu.

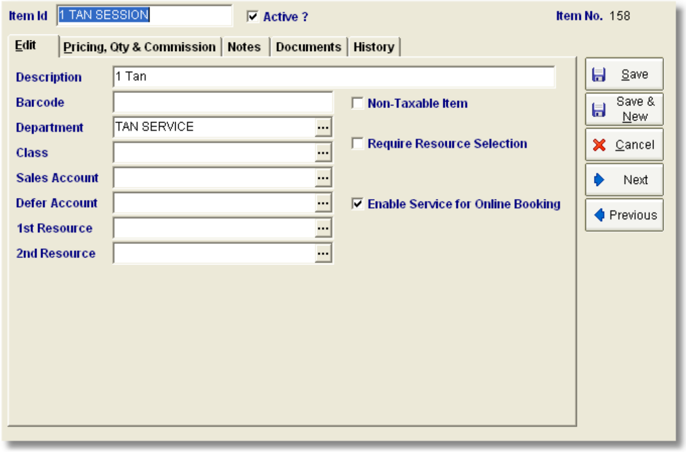




A list of your tanning items will appear. This list may be empty if you have not added any tanning items to this list.

3. Click the "New" button to add a new Tanning item to the list or click the "Edit" button to edit a Tanning item in the list.

Tanning Item Edit



4. Enter the name of the package or session 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 Point Of Sale screen will be able to remember when searching for the item.

5. Enter a description in the "Description" field.

Enter the plain language description you wish here. The name you enter here is what will be displayed on the inventory list, Point of Sale and reports.

6. It is not necessary to enter a barcode for tanning items, however you may enter a number if you would like to print a sheet of barcodes.

7. Select or add an Inventory department for the tanning item you are entering.

Select from the drop down list the Department this item belongs in. You may create a Department "On the Fly" if you wish by clicking the "Add New" button when the list of Departments screen appears.

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

Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing. Select from the drop down list the class of service this item belongs to. As with Department you may create a new Class when the list screen appears.

9. Select Accounts for the item (optional).

Select from the drop down list the account this item belongs to. You create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu. The accounts are used mainly for the QuickBooks Interface. The QuickBooks Interface is an Add-In Module available for purchase along with Envision.

10. Select the required resources for the item you are adding.

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

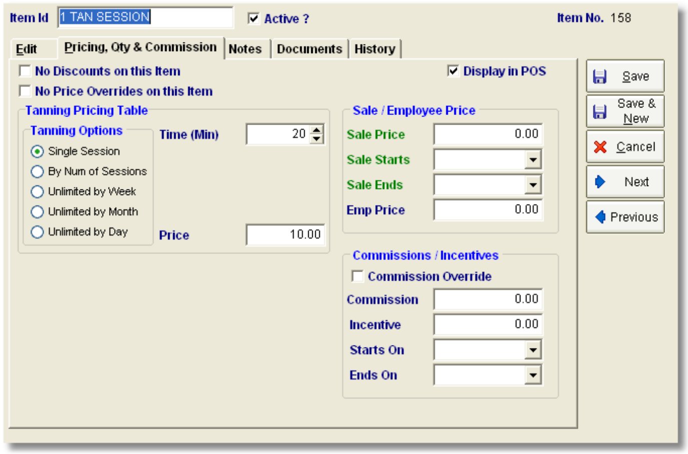
11. Edit the tax options (optional).

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services. If you did not check the "taxable" check box for service items in the Program Preferences on the "Tax" tab, it is not necessary to check this box.

12. Click on the "Pricing, Qty & Commission" tab below the Item Id field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Tanning Item Pricing, Qty & Commission



13. Select the correct "Tanning Option" in the Tanning Pricing Table for the item you are entering.

Select the option that applies to the amount you will be entering into the "Price" field.

NOTE: The field you check here will determine what appears to the right. Below is an example of the different fields that will appear.

- **Single Session:** The price you set applies for one tan. When you check this box the "Time (Min)" field will appear to the right. You must then select how long the session is.
- **By # of Sessions:** The price you set applies for a set number of sessions. When this field is checked the "No. Sessions" appears to the right and you must select the number of sessions that the price will apply to.
- **Unlimited by Week:** When you check this box, the "No. Weeks" field appears to the right and you must select how many weeks of unlimited tanning the client gets for the price you will be entering.
- **Unlimited by Month:** When you check this box, the "No. Months" field appears to the right and you must select how many months of unlimited tanning the client gets for the price you will be entering.
- **Unlimited by Day:** When you check this box, the "No. Days" field appears to the right and you must select how many days of unlimited tanning the client gets for the price you will be entering.

14. Enter an amount into the "Emp Price" field if you would like to give your employee's a discounted price on this item.

When setting up the program, it may be best to enter Employee Prices when you enter your services so that you do not have to return to these screens to enter an Employee Price for each service. You may not use the Sale Price until a later time, if the item is ever on sale.

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

Checking these boxes prevents this item from being sold for any less than the retail price you set here. No discounts or overrides will be allowed without the **Manager Override Password**.

16. 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.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Tanning Worksheet

Use this worksheet to practice entering products into the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own tanning items into your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on the Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

Open the Tanning List and add the following items to the list.

1. 5 Session Tanning Package

- Department: SERVICE - TANNING
- Class: TANNING PACKAGE
- Resource: TANNING BED
- Price: $50

2. 1 Month Unlimited Tanning Package

- Department: SERVICE - TANNING
- Class: TANNING PACKAGE
- Resource: TANNING BED
- Price: $200

3. 2 Week Unlimited Tanning Package

- Department: SERVICE - TANNING
- Class: TANNING PACKAGE
- Resource: TANNING BED
- Price: $100

You may use the following as an example:

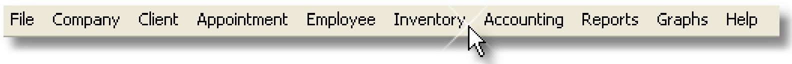
Tanning Service: 1 Tan Session

Notes

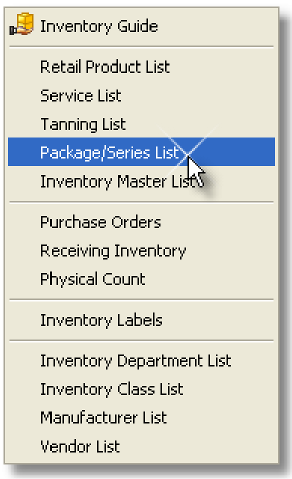
Package List

A Package can contain either physical products, Services, or Tanning. The purpose is to combine items and sell them for a discounted price.

1. Click on "Inventory" on the Menu Bar at the top of the screen.



2. Select "Package / Series List" from the drop down menu.



A list of your packages will appear. This list may be empty if you have not added any items to this list.

3. Click the "New" button to add a new Package to the list or click the "Edit" button to edit a Package in the list.

Package Item Edit

4. Enter the name of the package 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 Point Of Sale screen will be able to remember when searching for the item.

5. Enter a description in the "Description" field.

Enter the plain language description you wish here. The name you enter here is what will be displayed on the inventory list, Point of Sale and reports.

6. It is not necessary to enter a barcode for packages, 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 package you are entering.

Select from the drop down list the Department this item belongs in. You may create a Department "On the Fly" if you wish by clicking the "Add New" button when the list of Departments screen appears.

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

Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing. Select from the drop down list the class of service this item belongs to. As with Department you may create a new Class when the list screen appears.

9. Select Accounts for the package (optional).

Select from the drop down list the account this item belongs to. You create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu. The accounts are used for the QuickBooks Interface. The QuickBooks Interface is an Add-In Module available for purchase along with Envision.

10. Select whether or not the package is a "Series (Prepaid)" package.

This option 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 that this package will be used up when the client checks out at the Point Of Sale (POS) for the items included in the package the number of times equal to the "Qty" you set for each item on the "Package Details" screen. This also allows you to track the usage of the items the client has prepaid for. For example, you wish to create a prepaid package of 10 Wash and Blow Dries. You would check this box and on the "Package Details" screen select the inventory item Wash and Blow Dry. Then enter a quantity ("Qty") of 10. When a client gets a Wash and Blow Dry and checks out at the register (POS) 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 select the package from inventory, select the client from your client listing (add them "On the Fly" if they're not already entered), and make the sale. The package count of 10 is assigned to this customer, they are charged for the total package (prepaid) and their count is automatically reduced by one to 9 since they just used one of the Wash and Blow Dries. The next time they come in for this service, when they go to the register they give their name and they are not charged, but their count is reduced to 8. *Envision* will not charge the client at the Point Of Sale until all the items in the package are used.

Note: You must enter "Client" information at the POS to sell a Package.

11. Check "Prepay Commissions on Package" if you would like your service providers to receive service commission on the price of the package.

The employee will receive their service commission percentage on the price of the package.

12. Check "Report Pkg Sales under Service" if you would like the package to be considered a service item in your reports.

The package will be included with your service items, however you will not be able to run a separate report on just your packages unless you have a separate Inventory Department specified for only packages.

13. Click on the "Package Details" tab below the Item Id field.

Package Details

14. Click in the field in the "Item" column and click on the small button with the three dots to select the first item that is included in the package you are entering.

Each time you click the "Add Item" button (lower left hand corner) a new row is created in this area of the screen. All the items that make up the "Package" you are putting together are shown here. You will click the small button in the "Item" field and select the Inventory item to include in this package. Then enter how many of that item is included in this package in the "Qty" field. You can click the "Remove Item" button to delete the item you have highlighted on the list.

15. Set a Package Price or a Discount Percent.

You may enter your special "Package" price for each item you add to this package. However, it is strongly recommended that you set a discount price or discount percent using either the "Price" or "%Disc" fields at the bottom of this screen.

The "Price" and "%Disc" fields work in conjunction with the large "Set a Discount % or Package Price" button. You may enter a flat price for the package and when you click the button the program will automatically calculate the percent of discount, individual item's "Package" prices, and the "Retail Price" and "% 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.

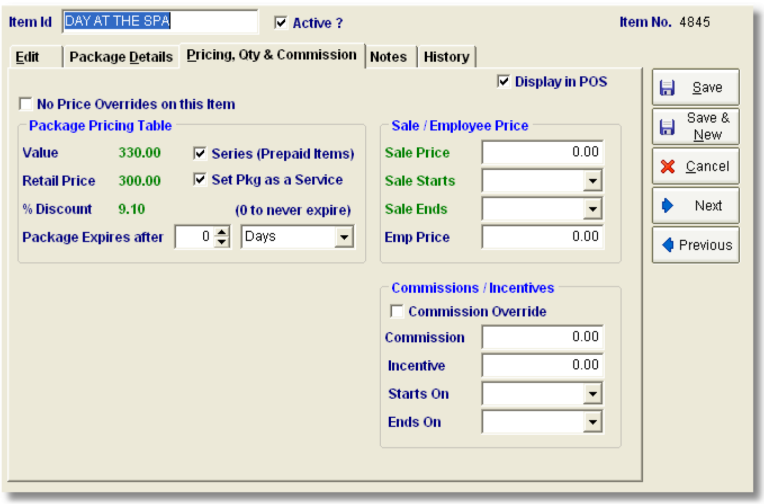
16. Review the package information.

"Value", "Retail Price", and "% Discount" are all determined by the prices you choose by entering the individual "Package" price for each item in this package, or (Highly Recommended) by entering either "Price" or "% Disc" and clicking the "Set a Discount % or Package Price" button on the "Package Details" tab. You may use this information to adjust the Package Price if necessary.

17. Click the "Pricing, Qty & Commission" tab.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Package Pricing, Qty & Commission



18. Set an expiration for the package you are entering if necessary.

Select whether the package expires in a certain amount of days, weeks or months, and set a number associated with this selection in the field to the left. You may use the up and down arrows to set this number or you may type the number into this field.

19. Enter an amount into the "Emp Price" field if you would like to give your employee's a discounted price on this item.

When setting up the program, it may be best to enter Employee Prices when you enter your services so that you do not have to return to these screens to enter an Employee Price for each service. You may not use the Sale Price until a later time, if the item is ever on sale.

20. Enter a Commission Override or Incentive if necessary.

If you wish to pay a specific dollar amount instead of a commission percentage to employees that sell this product, check the "Commission Override" box and enter a dollar amount in the "Commission" field. This will override any commission percentages you may use for an employee.

If you wish to pay an "Incentive" amount for employees selling this product, enter an amount here. Normally, an incentive is offered for a limited time. Enter the "Starts On" and "Ends On" dates to set that period of time.

21. 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.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Package Worksheet

Use this worksheet to practice entering packages into the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own own packages into your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

Open the Package / Series List and add the following items to the list.

1. 30 Minute Massage Package - 5

- Department: PACKAGES
- Class: MASSAGE PACKAGE
- Services: 5 - 30 Minute Massages
- Price: $180
- Package Expiration: 12 Months

2. Manicure / Pedicure Combo

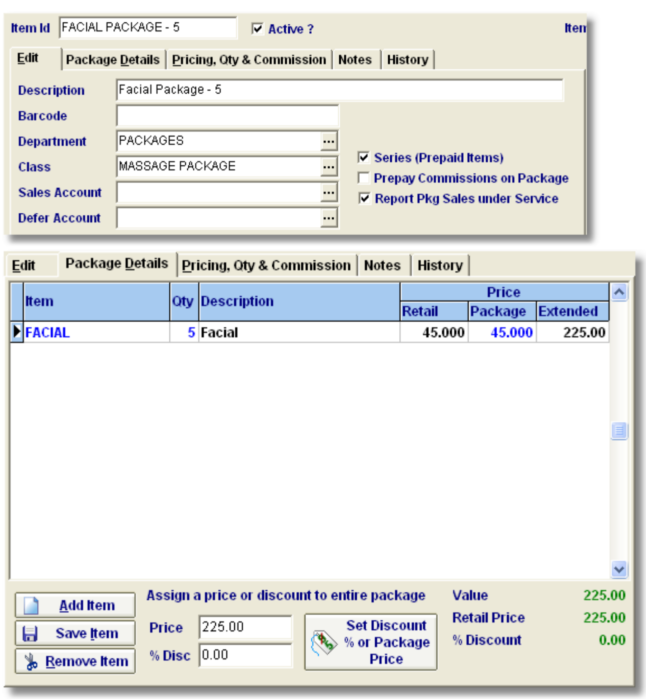
- Department: PACKAGES
- Class: Combo
- Services: Manicure, Pedicure
- Price: $65

3. Day At The Spa

- Department: PACKAGES
- Class: SPA PACKAGE
- Services: 30 Minute Massage, Facial, Manicure, Pedicure
- Price: %15 Discount

You may use the following as an example:

Package: Facial Package - 5

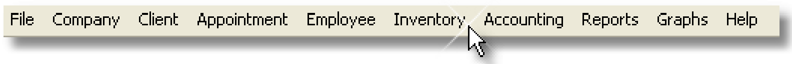


Notes

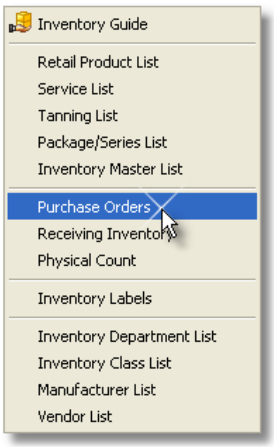
Purchase Orders

Purchase Orders (PO's) are a key element for maintaining inventory. Purchase orders work in conjunction with the "Receiving Inventory" screen, which closes out the Purchase Orders.

1. Click on "Inventory" on the Menu Bar at the top of the screen.



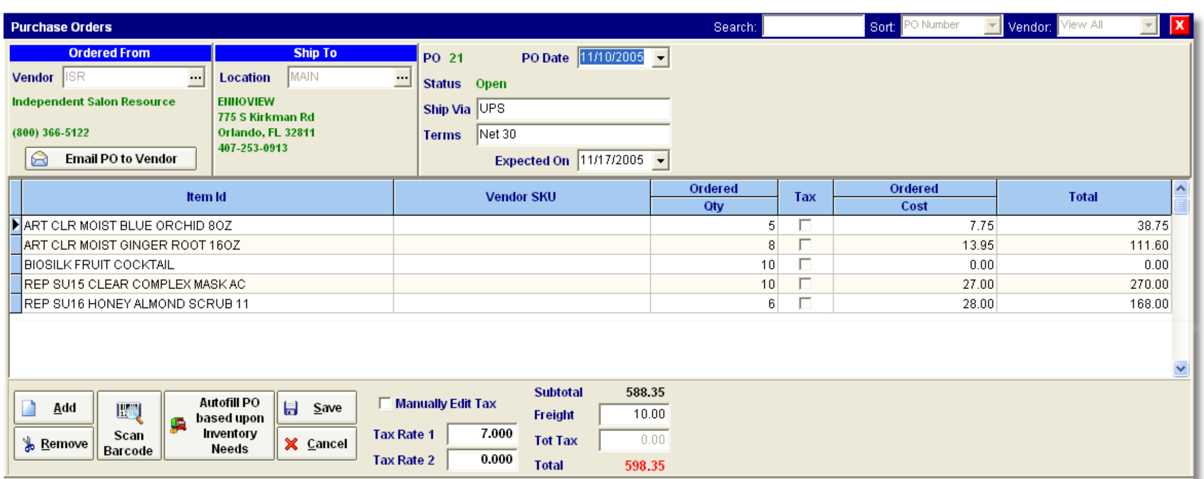
2. Select "Purchase Orders" from the drop down menu.



A list of your Purchase Orders will appear. This list may be empty if you have not added any items to this list.

3. Click the "New" button to create a new Purchase Order or click the "Edit" button to edit a Purchase Order in the list.

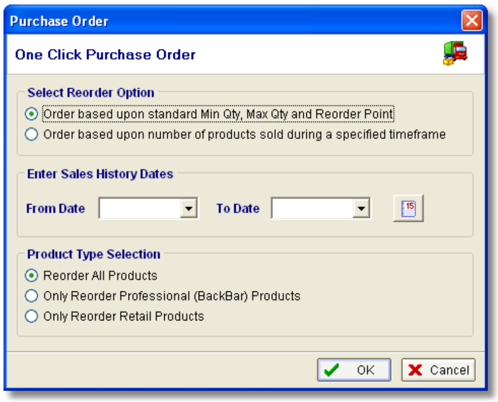
The following image is an example of what a Purchase Order will look like:



4. Select the Vendor that you will be purchasing products from.

Click the small button and select from the drop down list of Vendors you entered when you setup the program. No Vendors on your list? Not to worry, the program allows you to enter nearly every setup item "On the Fly". Just click the "Add New" button to add a vendor "On the Fly".

5. Click the "Autofill PO based upon Inventory Needs" button to scan for products that need to be reordered.



- **Order based upon standard Min Qty, Max Qty and Reorder Point:** Click this button to automatically load all the items from this Vendor that have met the "Reorder At" level you set when you added the items to inventory. Clicking this button will also enter the order quantity for each item that you have entered an order level for.

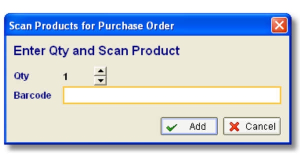
- **Order based upon number of products sold during a specified timeframe:** Select this option if you would like to "Autofill" the Purchase Order based upon the number of products sold between the dates specified in the "Enter Sales History Dates" section.

- **Enter Sales History dates:** Select a "From Date" and "To Date" if you have selected the "Order based upon number of products sold during a specified timeframe" option.

- **Product Type Selection:** Select the type of products that you would like to reorder - All Products, only Professional (BackBar) Products, or only Retail Products.

You May Also:

6. Click the "Scan Barcode" button if you would like to scan the barcode of the products you would like to order.



Click this button to scan the barcodes of the items that you would like to enter into the Purchase Order. You will then need to specify the quantity you would like to order of the product you scanned.

OR:

7. Click the "Add Item" button to select items for your list of products.

Click the "Add Item" button to create a new item line on the purchase order for additional items. When you first opened the new PO a space was created for your first item on this PO. Click this button if you would like to add more than one item.

Click the "Remove Item" button to remove the selected (highlighted) item in the list. You will get an "Are You Sure" warning before it is removed.

8. Enter the "Ship Via" and "Terms" information.

Enter the Shipping method you wish, for example UPS or USPS. Also, enter the payment terms you wish. This is normally pre-arranged with the vendor.

Note: These 2 fields will be filled in automatically when you select the Vendor if you entered this information when you entered your Vendors during setup.

9. Specify the "Expected On" date.

Click the small button and select from the calendar that appears the date you wish to receive the products.

10. Edit the Tax Rates if necessary.

The Tax rates you entered for your state on the **"Tax"** tab when you chose **"Setup Program Preferences"** on the **"Company"** menu will appear here. You may change the tax rate by clicking the "Manually Edit Tax" box.

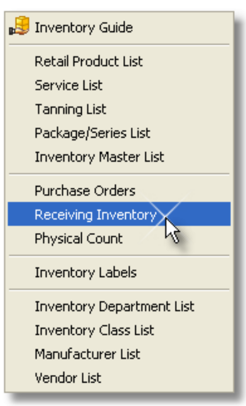
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

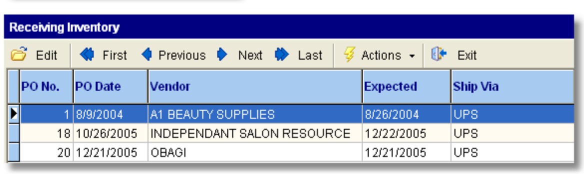
Receiving Inventory

The Receiving Inventory screen is used when Products are physically received at your store. When you enter the quantity that was on the Purchase Order, the Purchase Order automatically becomes completed and it's Status becomes "Closed". Receiving any quantity less than what is on the Purchase Order keeps the Purchase Order active and will change it's Status to "Partial".

1. Click on "Inventory" on the Menu Bar at the top of the screen.

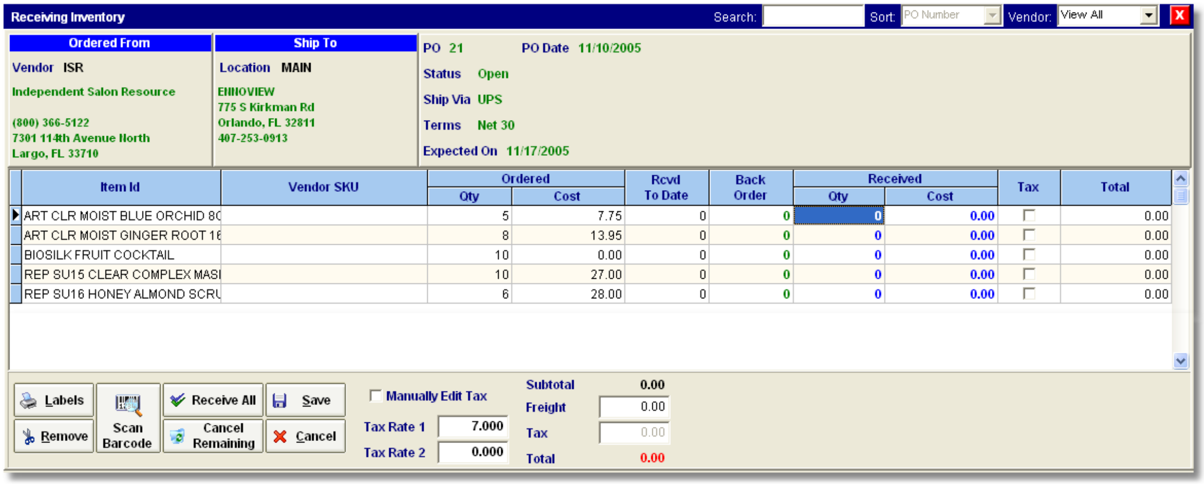
2. Select "Receiving Inventory" from the drop down menu.





3. Click the "Edit" button to edit a Purchase Order in the list.

The screen shot below shows a sample screen of the Receiving Inventory.



4. Enter the quantity for each item under the "Received" column.

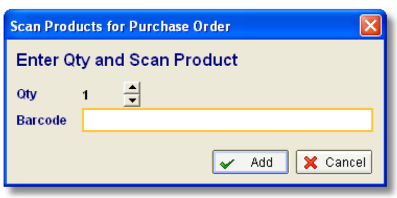
If the "Received Qty" does not match the "Ordered Qty" the difference will be entered in the "Back Order" field.

5. You may also click the "Receive All" button if you have received all of the items in the list.

If your order came in exactly as you ordered it, click this button and all the items on the PO will be received automatically. The On Hand quantities will be updated to the new physical quantity when you click the "Save" button. This is a very time saving feature.

OR

6. Click the "Scan Barcode" button to scan the items that you have received.

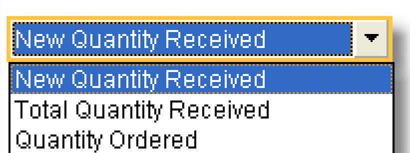


Click this button to scan the barcodes of the items that you would like to scan in as received. Use the arrows to specify the quantity received.

7. Click the "Cancel Remaining" button if you will not be receiving the items that you did not specify a received quantity for.

Click this button to cancel all remaining items that haven't been received.

8. Print Inventory Labels if necessary



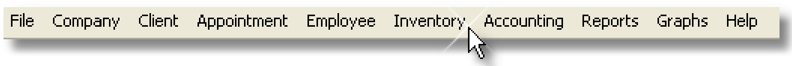
Click this button to print your own barcode labels for these products. Click on the drop down arrow under "Print Number of Labels Based On" to select how many labels you wish to print depending on the quantities in the order.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

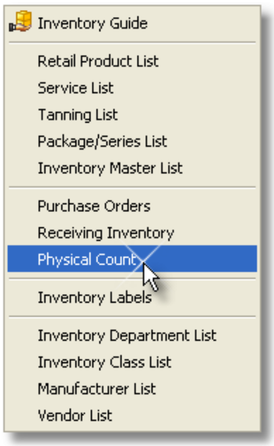
Physical Count

This screen can be used when you do a physical count for your products. It provides a fast way to update the count of products in the program. Large variances between the Physical Count and the value Envision has displayed, should be a warning.

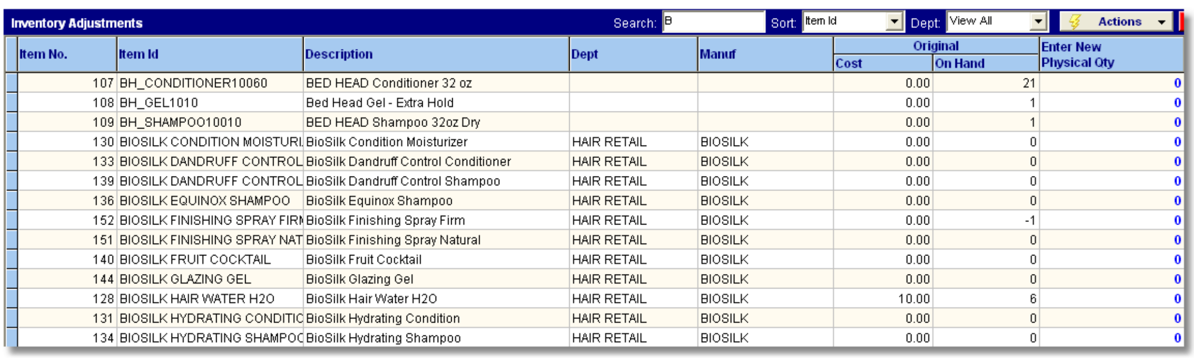
1. Click on "Inventory" on the Menu Bar at the top of the screen.



2. Select "Physical Count" from the drop down menu.



The following image is an example of the Physical Count screen:


Inventory Adjustments Search: B Sort: Item Id Dept: View All Actions

Item No.	Item Id	Description	Dept	Manuf	Original Cost	Original On Hand	Enter New Physical Qty
107	BH_CONDITIONER10060	BED HEAD Conditioner 32 oz			0.00	21	0
108	BH_GEL1010	Bed Head Gel - Extra Hold			0.00	1	0
109	BH_SHAMPOO10010	BED HEAD Shampoo 32oz Dry			0.00	1	0
130	BIOSILK CONDITION MOISTURI	BioSilk Condition Moisturizer	HAIR RETAIL	BIOSILK	0.00	0	0
133	BIOSILK DANDRUFF CONTROL	BioSilk Dandruff Control Conditioner	HAIR RETAIL	BIOSILK	0.00	0	0
139	BIOSILK DANDRUFF CONTROL	BioSilk Dandruff Control Shampoo	HAIR RETAIL	BIOSILK	0.00	0	0
136	BIOSILK EQUINOX SHAMPOO	BioSilk Equinox Shampoo	HAIR RETAIL	BIOSILK	0.00	0	0
152	BIOSILK FINISHING SPRAY FIRI	BioSilk Finishing Spray Firm	HAIR RETAIL	BIOSILK	0.00	-1	0
151	BIOSILK FINISHING SPRAY NAT	BioSilk Finishing Spray Natural	HAIR RETAIL	BIOSILK	0.00	0	0
140	BIOSILK FRUIT COCKTAIL	BioSilk Fruit Cocktail	HAIR RETAIL	BIOSILK	0.00	0	0
144	BIOSILK GLAZING GEL	BioSilk Glazing Gel	HAIR RETAIL	BIOSILK	0.00	0	0
128	BIOSILK HAIR WATER H2O	BioSilk Hair Water H2O	HAIR RETAIL	BIOSILK	10.00	6	0
131	BIOSILK HYDRATING CONDITIC	BioSilk Hydrating Condition	HAIR RETAIL	BIOSILK	0.00	0	0
134	BIOSILK HYDRATING SHAMPOC	BioSilk Hydrating Shampoo	HAIR RETAIL	BIOSILK	0.00	0	0

3. Enter the New Physical Quantity (far right of each listed item).

Enter the actual number of this item in this field. It will not immediately update the programs count.

4. Click on the "Actions" button and select "Update Inventory Quantities".

Once you have entered the physical count for all the items, click the "Actions" button and select "Update Inventory Quantities". You will be asked if you are sure you want to do this, answer "OK" if true. All the values you entered in the "Enter New Physical Quantity" column will overwrite the counts maintained by the program.

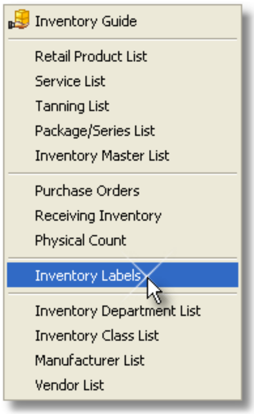
Note: If the Physical count matches the programs count enter a "0" (zero) if one is not already there. A zero tells the program to make no changes.

Printing Inventory Labels

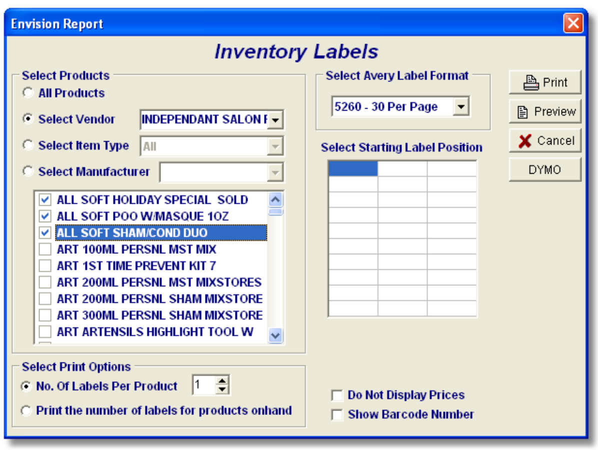
Envision provides this feature for printing Inventory Labels.

1. Click on "Inventory" on the Menu Bar at the top of the screen.

2. Select "Inventory Labels" from the drop down menu.



The following screen will appear:



3. Select the products that you would like to print labels for.

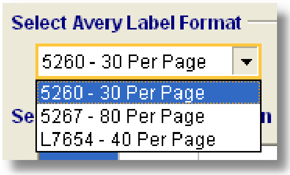
You may select the products that you would like to print labels for by the Vendor, Item Type, or Manufacturer. After selecting the products from the list (must have a check in the boxes to the left), specify how many labels you would like to print for the products you have selected or you may print the number of labels for the quantity on hand.

4. Select the Print Options.

Select the number of labels to print.

- **No. Of Labels Per Product:** This option allows you to print the number of labels specified to the right for each product selected.
- **Print the number of labels for products onhand:** This option will print the quantity "On Hand" for each product selected.

5. Select the Avery Label Format



You have the option of using either the Avery Label 5260 - 30 Per Page, Avery Label 5267 - 80 Per Page or Avery Label L7654 - 40 Per Page. Select the type of label that you have purchased. These labels can be purchased at any office supply store. If you have chosen the 5267 Labels you may choose what to display on the label.

6. Select the Starting Label Position

Select the Starting Label Position for the sheet of labels you are printing on.

7. Select Additional Options

- Check the "Show Barcode Number" check box if you would like the barcode number printed on the label.
- Check "Do Not Display Prices" if you do not want the price of the product displayed on the label. This option is only available for Avery Label 5267 and Avery Label L7654.

8. Click the "Preview" or "Print" button.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

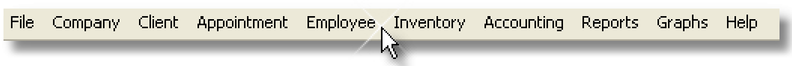
Notes

Employee Setup

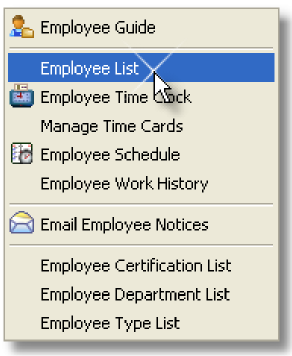
Employee List

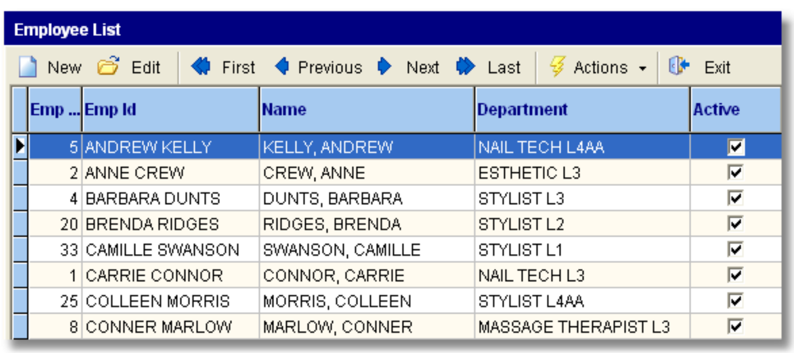
There are many screens provided in *Envision* to enter Employee information. Enter all the information about the employee you wish on these screens and then click the "Save" button to save all the screens. Some of the information provided on these screens may not apply to your business. You may leave them blank.

1. Click on "Employee" on the Menu Bar at the top of the screen.



2. Select the "Employee List" from the drop down menu.



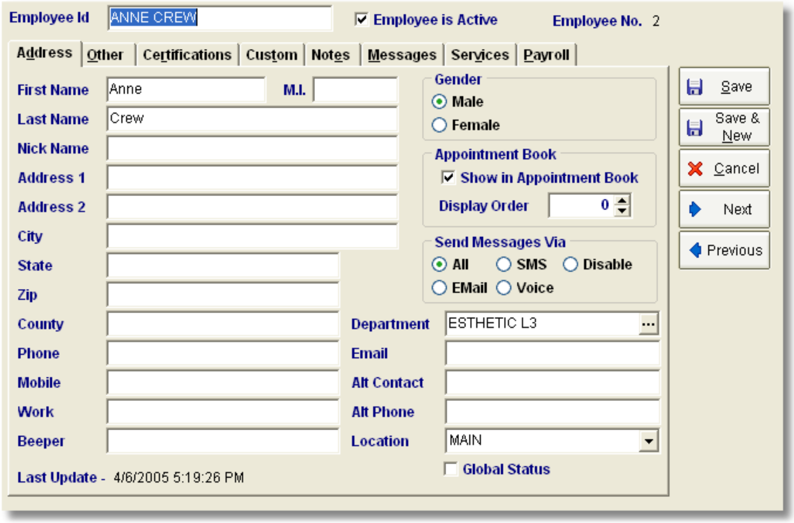


Emp ...	Emp Id	Name	Department	Active
5	ANDREW KELLY	KELLY, ANDREW	NAIL TECH L4AA	☑
2	ANNE CREW	CREW, ANNE	ESTHETIC L3	☑
4	BARBARA DUNTS	DUNTS, BARBARA	STYLIST L3	☑
20	BRENDA RIDGES	RIDGES, BRENDA	STYLIST L2	☑
33	CAMILLE SWANSON	SWANSON, CAMILLE	STYLIST L1	☑
1	CARRIE CONNOR	CONNOR, CARRIE	NAIL TECH L3	☑
25	COLLEEN MORRIS	MORRIS, COLLEEN	STYLIST L4AA	☑
8	CONNER MARLOW	MARLOW, CONNER	MASSAGE THERAPIST L3	☑

A list of your employees will appear. This list may be empty if you have not added any employees to this list.

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.

Employee Address Tab



4. Enter an Employee Id at the top of this screen.

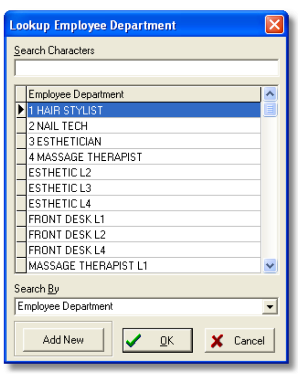
The Employee ID is used to Login/Logout an employee and is also used for searching for an Employee in the Point of Sale or Appointment Calendar windows.

5. Enter employee contact information.

Enter all available Employee information on this "Address" screen.

6. Select or add a Department for the employee.

Select the Employee Department by clicking on the small button in the Department field.



Click the "Add New" button if the department needs to be entered into the "Employee Department List.

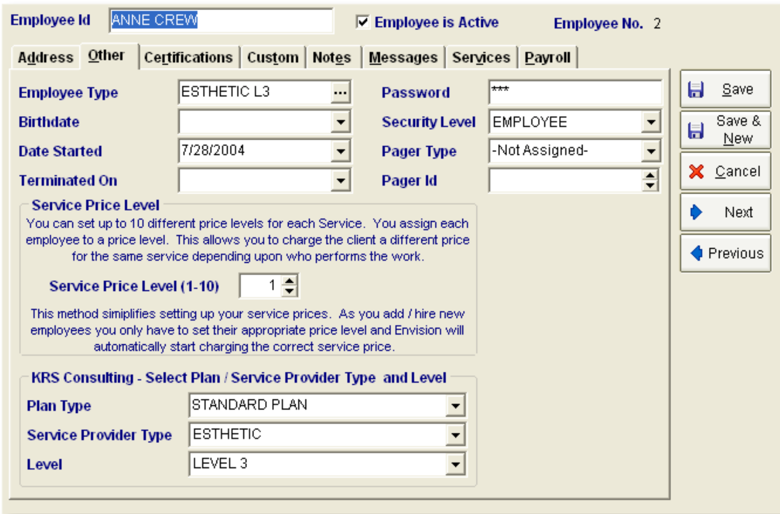
7. Uncheck the "Show in Appointment Book" check box if the employee you are entering does not take appointments and set a Display Order number.

Check whether or not to show this employee in the Appointment Book. 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.

8. Click on the "Other" tab below the "Employee Id" field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

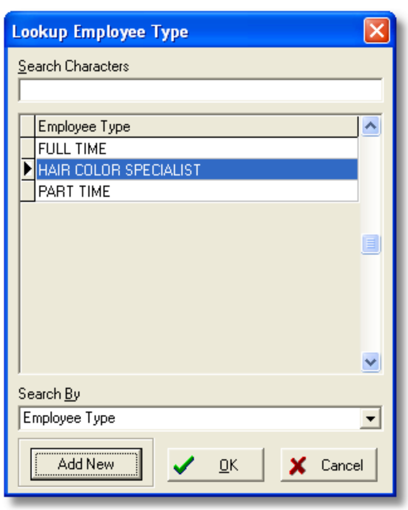
Employee Other Tab

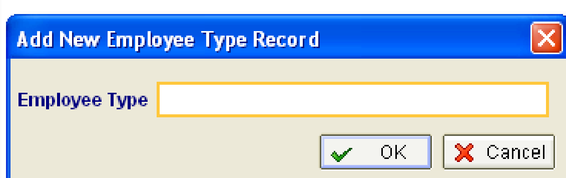


9. Select or add an Employee Type (optional).

The Employee Type can be used for categorizing your employees in different categories than their departments. An example of an Employee Type would be "Hair Color Specialist", or you may use the Type to specify whether your employees are Full Time or Part Time. It is not necessary to enter an Employee Type.

You may create or select an Employee type if your Employee Departments have different types of employees under each department. To create an Employee Type, click on the Browse button to the right of this field. This is the button with the three small dots.





The "Lookup Employee Type" window (shown above) will appear. Click on the "Add New" button in the lower left-hand corner of this window. Enter a new Employee Type and click on the "OK" button. You may then select this type from the list and click on "OK".

10. Enter the Employee's Birthdate and the date they started on.

Enter the employee's Birthdate and Start Date if this information is available. The Termination Date can be entered when the Employee is no longer working for you.

11. Enter a Password and select a Security Level if you will be using the Timeclock 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 login and logout with. The Pager Type and Page ID are to be entered if you are using the pager system.

Note: 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.

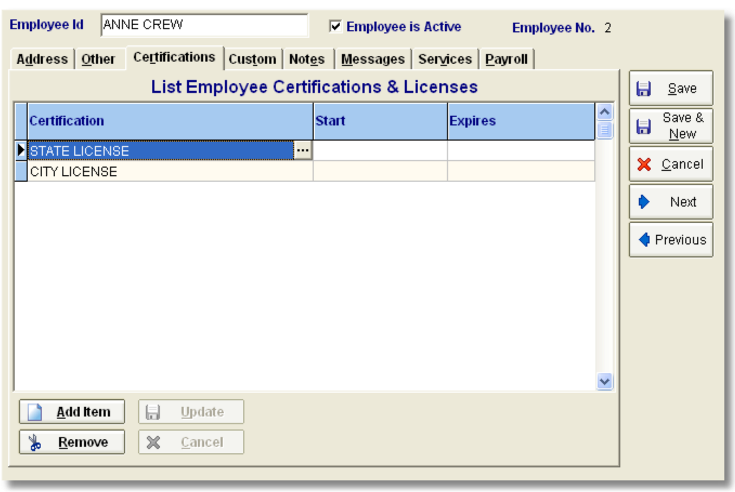
12. Select a Service Price Level if your employees are setup for different levels of pricing based on experience (optional).

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 below the "Employee Id" field.

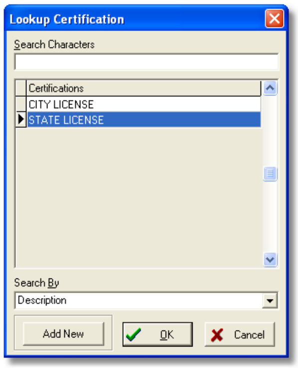
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Certifications Tab



14. If your employees have certifications or licenses that you need to keep on record, you may enter them in this window.

To create a certification, click on the Browse button to the right of the Certification field. This is the button with the three small dots.



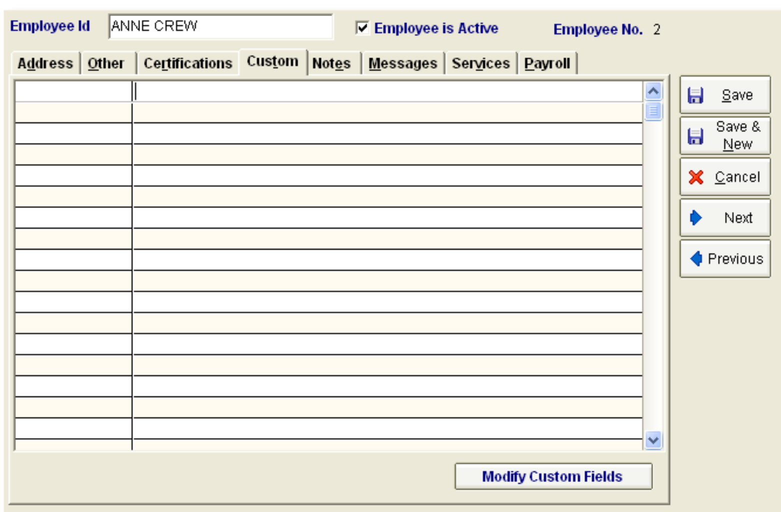
The "Lookup" window (shown above) will appear. Click on the "Add New" button in the lower left-hand corner of this window. Enter a new Certification type and click on the "OK" button. Select this Certification from the list and click on "OK".

15. Enter the Start Date and Expiration Date of the Certification.

If you would like to add more certifications for this Employee, click on the "Update Item" button and then click on the "Add Item" button to select or create a different certification.

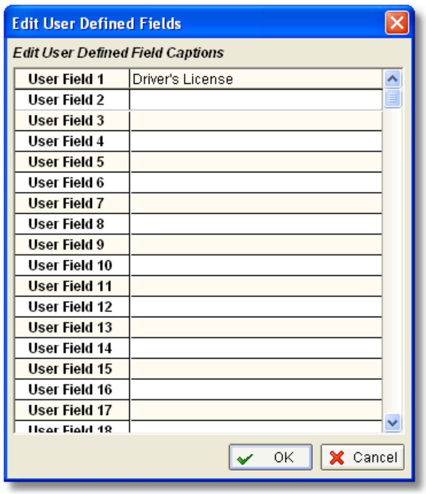
16. Click on the "Custom" tab below the "Employee Id" field.

Employee Custom Tab



Use the Custom screen to enter specific information about your employees that Envision has not included fields for.

17. Click on the "Modify Custom Fields" button at the bottom of this window to set up a new type of field.



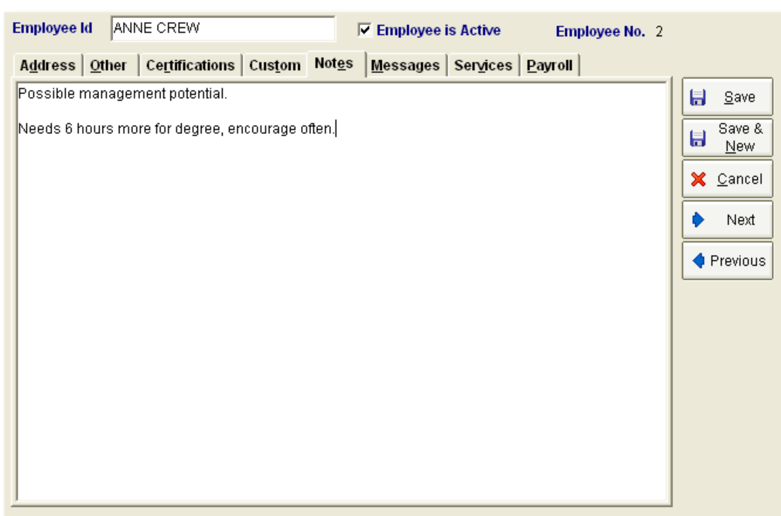
This window will appear for you to enter your own fields

18. Type in the fields that you would like to add in the User Fields and click "OK".

Examples of fields that you can set up are emergency contact fields, whether they are married or single, or how many children they may have. You may then enter the information about your Employees that you would like to include.

19. Click on the "Notes" tab below the "Employee Id" field.

Employee Notes Tab

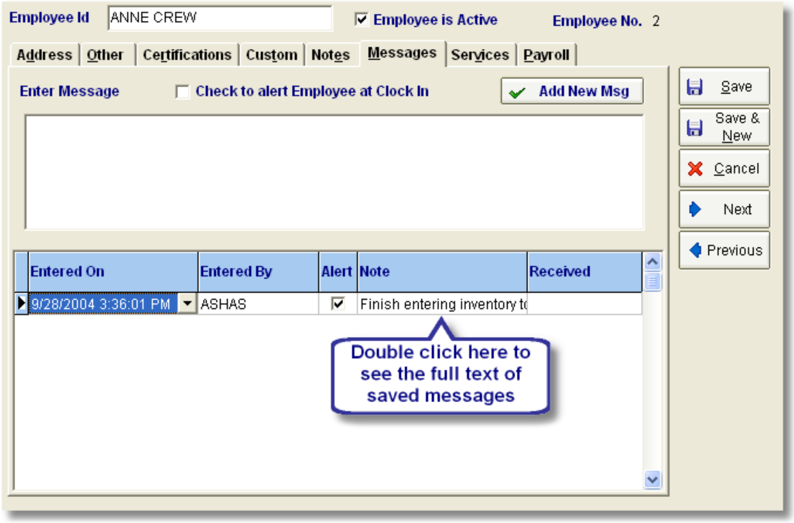


20. Enter any notes about this employee that you may want to keep on record.

The notes field is unlimited in the amount of characters you may enter.

21. Click on the "Messages" tab below the "Employee Id" field.

Employee Messages Tab



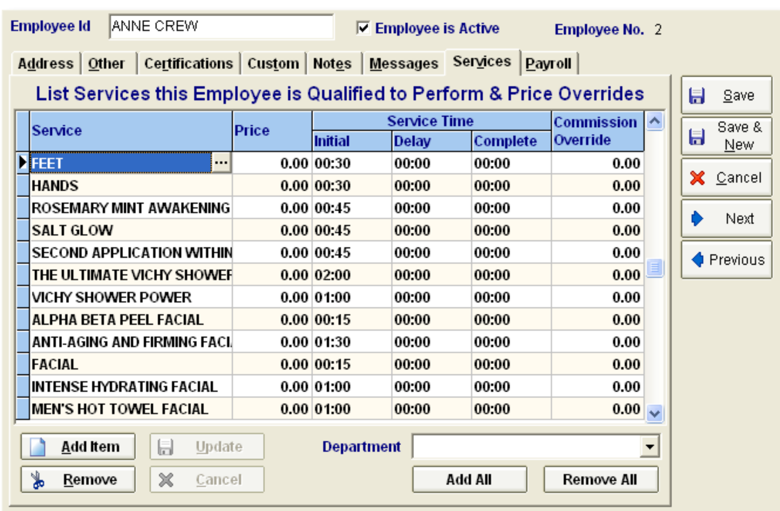
22. Use the Message screen to send a message to an employee when they clock in with the Employee Timeclock.

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.

23. Click on the "Services" tab below the "Employee Id" field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Services Tab



24. 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.

Qualified services that this employee is capable of performing can be entered in this window. Services must be entered before you are able to select the services that each employee is capable of. For more information on entering services, please refer to the Inventory Setup section of this guide.

25. 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).

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

26. Enter the amount of time that it takes for this employee to complete the selected services.

This screen will also allow you to set the length of time this employee takes to perform a service. You can also enter a delay time and then a completion time. 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.

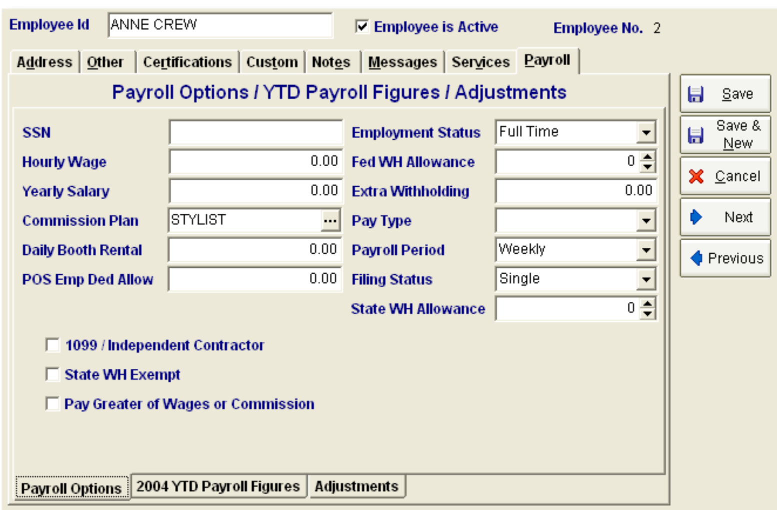
27. Enter a specific dollar amount in the Commission Override field if the employee needs to receive a specific dollar amount of commission for a specific service (optional).

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.

28. Click on the "Payroll" tab below the "Employee Id" field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Payroll Tab



29. 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.

Use this screen to enter all of the payroll information available for the employee you are adding to the list.

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.

30. 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.

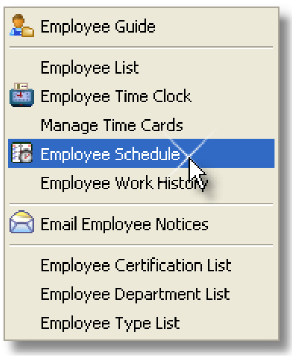
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Schedule

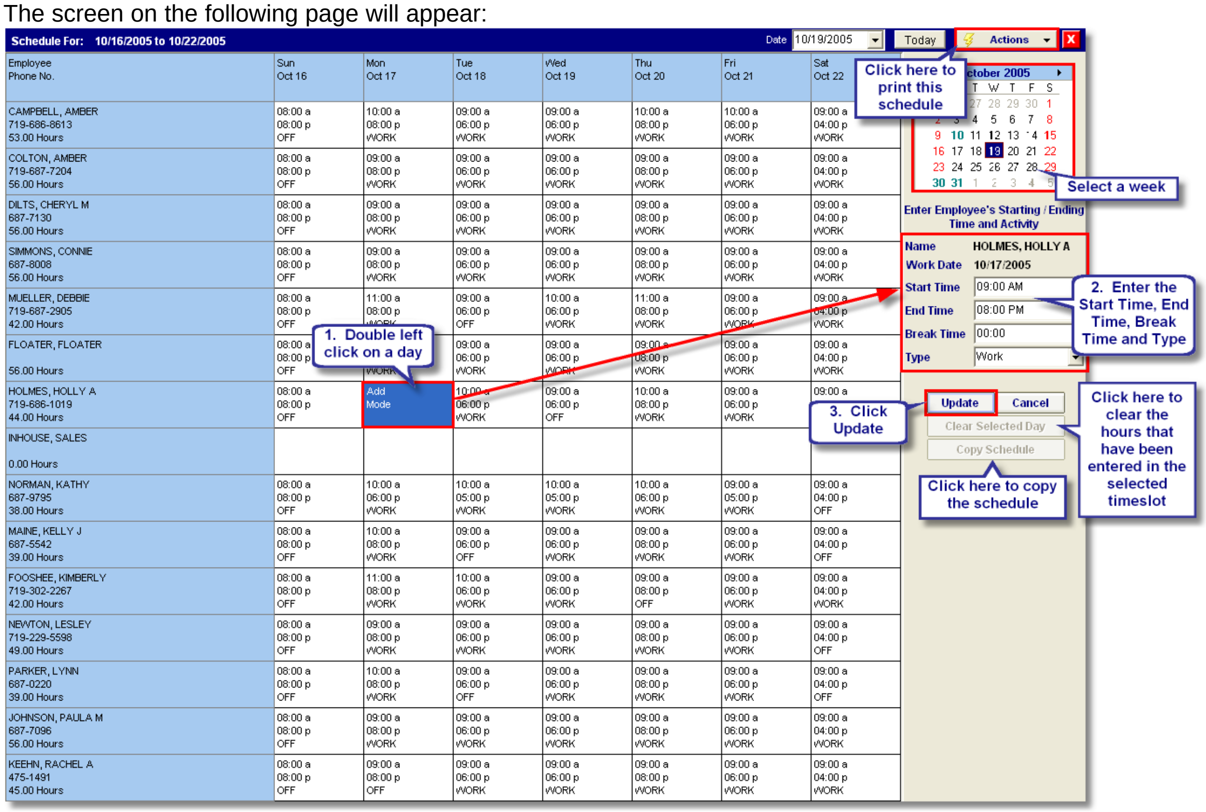
The Employee Schedule is where you will set the hours that each employee is available for in the Appointment Calendar.

1. Click on "Employee" on the Menu Bar at the top of the screen.

2. Select "Employee List" from the drop down menu.



The screen on the following page will appear:



3. Double Left Click on the cell you wish to modify

Double 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.

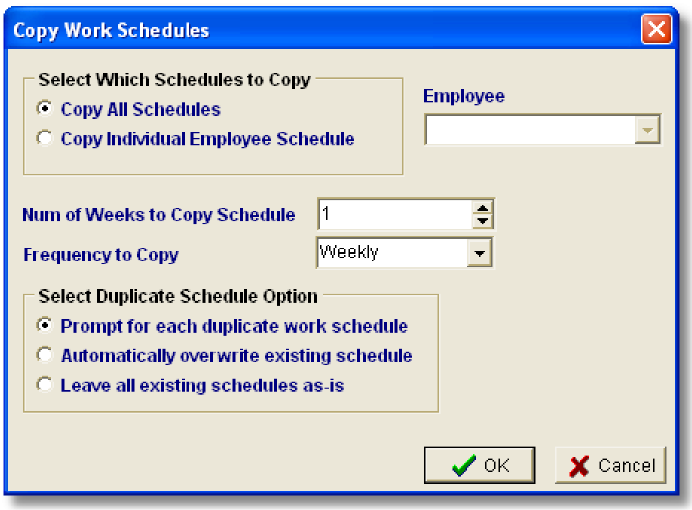
Under each employee's name and telephone number are the total Hours scheduled for the week. Don't forget to schedule in "Break Time" for meals and breaks. These deduct from the total hours for the week. You can also clear a selected day for an employee by highlighting the day and clicking the "Clear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

5. Click the "Update" button.

Click the "Update" button to 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.



Click 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.

In the **# of Weeks** field use the small arrow buttons to select how many weeks you want to copy the schedule you created.

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.

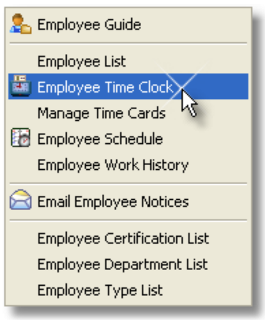
- **Prompt for each:** You will be prompted before overwriting future schedules.
- **Automatically Overwrite:** This will overwrite all future weeks without prompting you.
- **Leave all Existing:** This will not overwrite any future weeks.

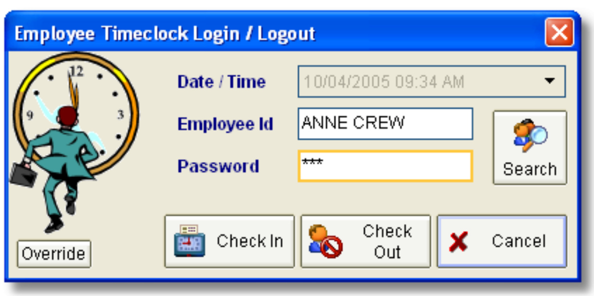
Employee Time Clock

Note: The Employee Time Clock is not available in the Envision Solo or Envision Standard versions.

1. Click on "Employee" on the Menu Bar at the top of the screen.

2. Select "Employee Time Clock" from the drop down menu.





This Time Clock screen will appear

3. Enter the Employee Id or select the Employee Id with the "Search" button.

If the employee does not know what their Employee Id is, they can click on the "Search" button to select their name from a list of employees.

4. Enter the employee Password.

This is the password set for the employee under the "Other" tab in the Employee List.

5. Click the "Check In" button to clock in.

The employee must click on the "Check In" button to clock in. Pressing the "Enter" key on the keyboard will not clock the employee in.

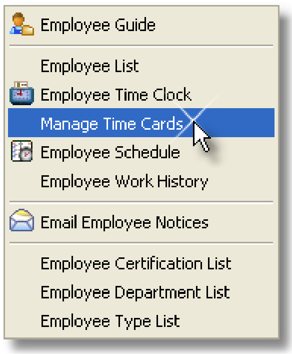
Note: The Date / Time field is entered automatically from the computers clock. This can be overridden by clicking the "Override" button, which is Password, protected. You will be asked for the Manager Override Password. For more information on the Manager Override Password, please refer to "Setup Program Options" under the "Setup Program Preferences" section of this guide.

Manage Time Cards

Note: This feature is not available in the Envision Solo or Envision Standard versions.

1. Click on "Employee" on the Menu Bar at the top of the screen.

2. Select "Manage Time Cards" from the drop down menu.



Manage Time Cards

Employee Id	Time Card: Clocked In	Time Card: Clocked Out	Work Type	Hours	Inc in Pay?	Mgr Over
ANDREW KELLY	10/4/2005 09:33 AM		Work	0.00	☑	☐
ANNE CREW	10/4/2005 09:34 AM		Work	0.00	☑	☐
BARBARA DUNTS	10/4/2005 09:35 AM		Work	0.00	☑	☐
CONNER MARLOW	10/4/2005 09:35 AM		Work	0.00	☑	☐
DONNA MARTIN	10/4/2005 09:36 AM		Work	0.00	☑	☐

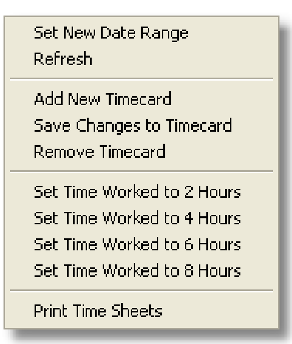
A list of Time Cards will appear

3. Click on the date or time in the Clocked In or Clocked Out fields (must be highlighted) to change the date or time. After making these changes, click on the "Actions" button and select "Save Changes to Timecard".

This screen enables you to view and manually edit the times that each employee clocked in and clocked out at. The listing is sorted by the most recent dates first. Notice that if there was a "Manager Override" used when the employee was using the Time Clock, there will be a check mark in the right hand box.

Note: When setting up the Program Security, this is a feature that only managers and owners should have access to. It is very simple to edit when an employee has clocked in and clocked out.

The "Actions" menu (shown below) allows you to do the following:



Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Worksheet

Use this worksheet to practice using the Employee screens in the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own information in your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

1. Open the Employee List and add the following employee to the list:

- Employee Name: Jennifer Smith
- Address 1: 303 Sunny St
- City: Orlando
- State: Florida
- Zip: 32811
- Phone: 555-555-5555
- Gender: Female
- Show In Appointment Book - leave checked
- Department: Stylist
- Employee Type: Full Time
- Password: 123
- All all hair services to the employee's list of services

2. Open the Employee Schedule and enter the following schedule for Jennifer Smith. This employee will have the same schedule every week for an entire year.

- Sunday: 8AM - 8PM OFF
- Monday: 9AM - 6PM WORK
- Tuesday: 1PM - 9PM WORK
- Wednesday: 1PM - 6PM WORK
- Thursday: 8AM - 8PM OFF
- Friday: 9AM - 5PM WORK
- Saturday: 12PM - 8PM WORK

3. Open the Employee Time Clock and Clock In Jennifer Smith.

4. Clock Jennifer Smith Out.

5. Open the Manage Time Cards window and edit or enter the following Time Cards:

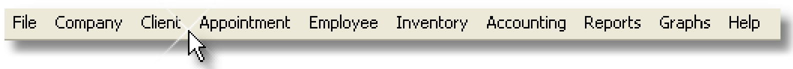
- Jennifer Smith - Change the Clocked In time to 9AM and the Clocked Out time to 6PM.
- Add a Timecard for John Warder - Clocked In time 1PM and Clocked Out time 6PM.

Notes

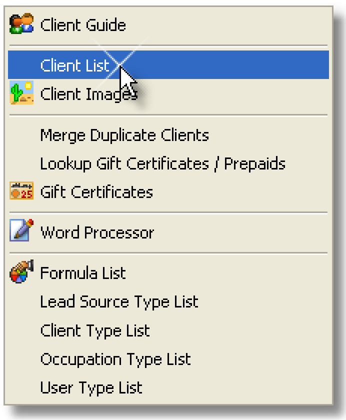
Clients

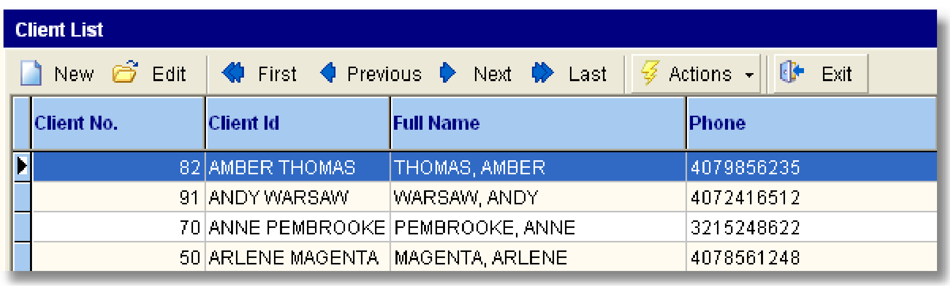
Client List

1. Click on "Client" on the Menu Bar at the top of the screen



2. Select "Client List" from the drop down menu.

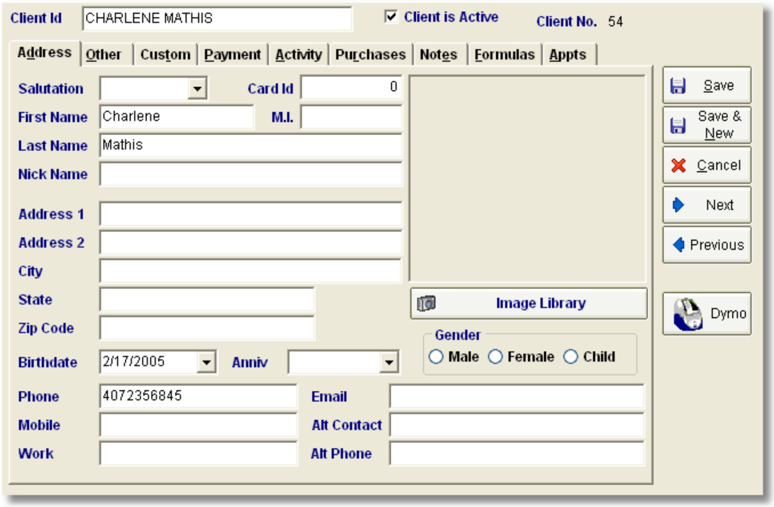




A list of clients will appear. This list may be empty if you have not added any clients to this list.

3. Click the "New" button to add a new client to the list or click the "Edit" button to edit a client's record.

Client Address Tab



4. Enter the client's full name in the "Client Id" field.

The Client ID is the name that you will usually use to search for a client or to select a client for appointments or POS (Point of Sale) client information. You may enter any type of client ID, however we strongly suggest that either a full first name and last name or full last name and first name be used for the Client ID. It will be easier for every employee to enter a full name when searching for or selecting a client from your client list when scheduling appointments or checking a client out.

Clients can also be added to your Client List from the POS screen as well as the Appointment Calendar. When you enter the client's information from these screens, the Client ID will automatically be set to the first initial and last name of the client. It would be best to change this to a full first and last name when adding clients from any of these screens.

Note: You may change the default setting of the Client ID format on the Setup Program Preferences "Other" Tab. Click on "Company" from the menu bar, select "Setup Program Preferences from the drop down menu and click on the "Other" tab.

5. Enter the client's name in the First Name, M.I., and Last Name fields.

These fields are standard. The only added feature is the "Nickname" field, where you can enter a name the client prefers to be called.

Note: You can enter any salutation you wish, the drop down list is only for convenience.

6. Enter the client's address.

There is an additional field called "Address 2" that allows you to enter items such as "Apartment #3", "Deerfield Estates", or "Suite 301.

7. Enter the client's Birthdate and Anniversary date.

These fields will allow you to identify people (by using reports) by their age group or anniversary. It's obvious how this could be used to promote new products or services. You can mail coupons, for example, to all your 50 and older clients so they can take a class for a discount. A second coupon is included so they can bring another person for free. This would help increase your client base.

8. Enter the client's contact information.

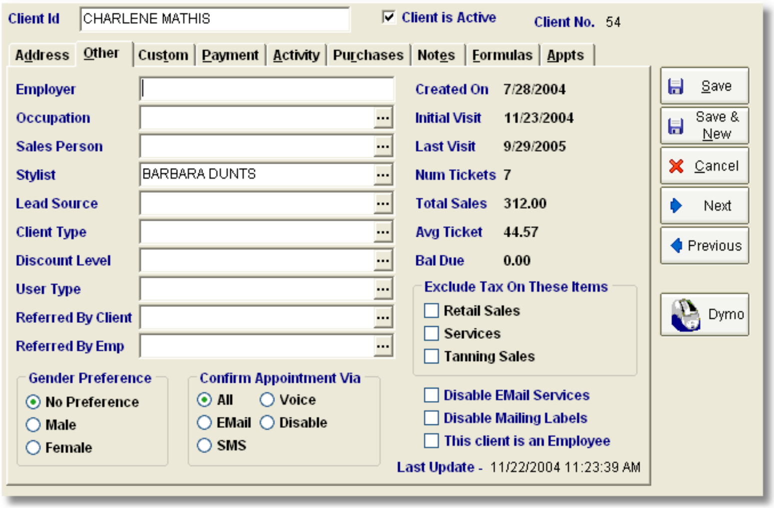
This area of the screen allows not only telephone numbers but also Email address and an Alternate contact such as a relative.

Note: The "Location" field is only applicable if you operate several locations, then you would choose from the list which location entered this client.

9. Click on the "Other" tab below the Client Id field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Client Other Tab



10. Enter the client's Employee and Occupation (optional).

Enter the Employer and Occupation of the client. This type of information can be used later for promotions.

11. Select the client's Sales Person, Stylist and Lead Source (optional).

Use these fields and you will be able to report on things such as how many clients a particular sales person has brought into your business, how many clients a particular Stylist has, and what generated the lead that brought this client into your business. All of these are valuable for marketing and sales.

12. Select or add the Client Type and Discount Level (optional).

Client Types are used to organize your clients into logical groups you may wish to target with specific advertising or promotions. You create these client types yourself.

The Discount Level is where you can apply a discount to anything the client purchases. For example, if you have Point of Sale stations, when the employee enters the client ID, all the items for that purchase will be automatically discounted by a certain amount. You could offer a 5% discount on all retail purchases for those clients that elect to pay the extra money to join your "Platinum Membership" program.

Note: Discount Levels are created in the Discount Plan List. This can be reached by clicking on "Accounting" on the Menu Bar and selecting "Discount Plan List" from the drop down menu.

13. Select or add the client's User Type and who they were referred by (optional).

Select from the drop down list of User types. You may also click the "Add New" button to add a new User Type. The User Type can be used for anything that you would like to use it for. Enter types into these fields that will help you with reports and filtering out clients. The User Type is sometimes used for memberships. For example, Gold member, etc.

- **Referred By Client -** Select the client from you list of clients that referred the client that you are entering into this list.
- **Referred By Employee -** Select the employee from your list of employees that referred the client that you are entering into this list.

14. Select the client's Gender and Gender Preference (optional).

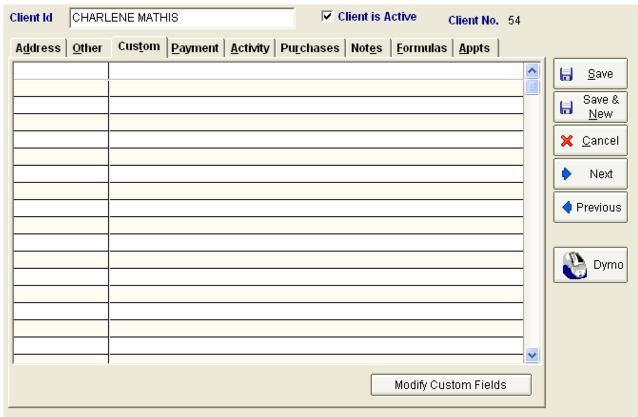
- **Gender:** Checking a box here will allow you to get reports of all your clients based on their gender. This could allow you to design tailored classes for "Women" only or "Men" only. Also, if you sell retail products, many of these products could be gender specific. You could, for example, mail out coupons for 20% off on a dietary supplement for women and mail it only to your women clients.

- **Gender Preference :** Select a Gender Preference for the client if they prefer to have a male or female service provider. If they do not have a preference, select "No Preference".

15. Click on the "Custom" tab below the Client Id field.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Client Custom Tab



Since your business will grow and your understanding of this program will increase, you will most likely need to store additional information. 20 fields with no names are provided for this purpose. This will allow you to track data that other programs would not allow.

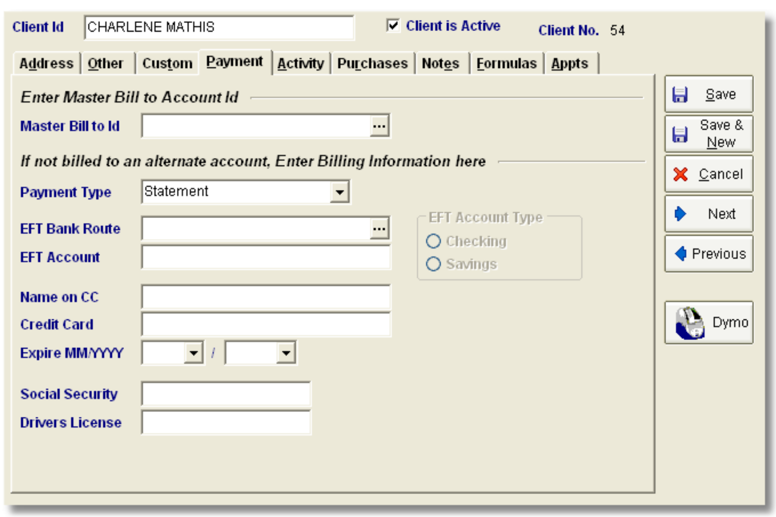
16. Click the "Modify Custom Fields" button and enter a name for your new field.

The fields that you create will show up in every client file. This ensures that future users of the program will enter the information you wish into these fields.

17. Enter the information for the fields you have created in the fields to the right.

18. Click on the "Payment" tab below the Client Id field.

Client Payment Tab



This screen provides fields to enter financial information about the client.

19. Select a Master Bill to Id (optional).

If you wish all charges by this customer placed "On Account" at the Point Of Sale (POS) to be charged to another account, select that account from the drop down list.

You might use this if a company has setup an account with you to allow all it's employee's to get a 20 minute Tan each week paid for by the company. You would setup the Company as a client and then each employee you added as a client, you would select their company as the Master Bill to ID.

20. Select the Payment type from the drop down list (optional).

If you select EFT (Electronic Funds Transfer), you must enter the Bank account information directly below this field. If you select a credit card, fill in the Credit card information starting with Billing Name. The SSN and Drivers License numbers are for identifying the client at the POS if they wish to use a check.

Note: If you wish to use EFT, you must be setup with the bank and enter the banks information into the program. You do this by selecting Bank List from the "Accounting" menu, click the "Actions" button and select "New" from the menu.

21. Enter the Bank Routing number (optional).

The Routing code is used to identify a bank. It would be either an ABA (American Banking Association) code or BIC (Bank Identification Code). An ABA code has exactly nine numeric digits, while a BIC has either eight or 11 letters or digits. The Routing number is shown as number "1" in the below picture.

Note: The check number is number "3" which matches the number at the top of the check.

22. Enter the Bank Account number (optional).

The Bank Account Number along with the Bank Routing Number uniquely identifies the client to the bank. Both numbers are required for Electronic Fund Transfer (EFT). The Account number is shown as number "2" in the below picture.

Note: The check number is number "3" which matches the number at the top of the check.

23. Select an EFT Account Type (optional).

Check whether a Checking or Savings account is referred to by the bank account information.

24. Enter the client's credit card information (optional).

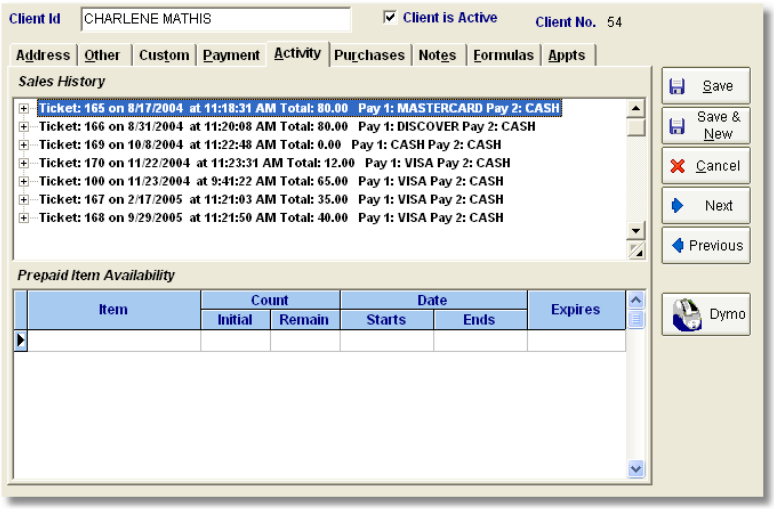
If you chose a Credit Card from the "Payment Type" selection above, you must enter the usual credit card information in these fields.

25. Enter the Social Security and Drivers License number for the client (optional).

Enter the SSN and Drivers Licensed number into these fields to allow easy identification in the future for the client.

26. Click on the "Activity" tab below the Client Id field.

Client Activity Tab



27. Click the small "+" sign next to an item as the details of this transaction will be shown.

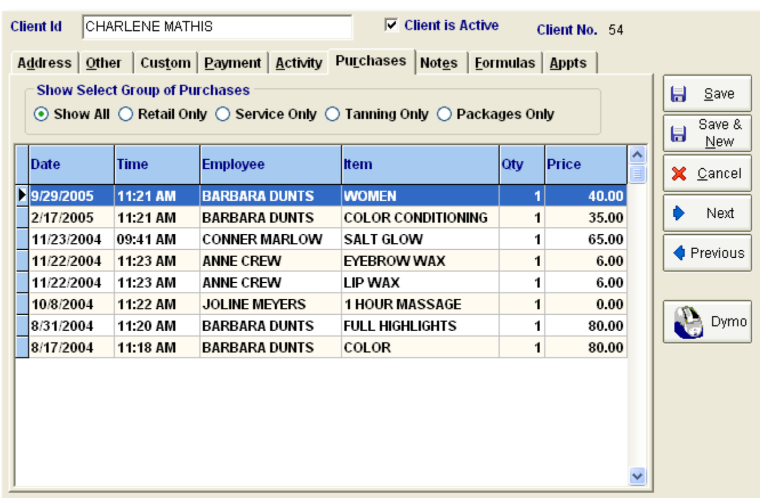
This area of the screen will show all activity at the Point Of Sale screen for this client. This includes purchases, returns, use of gift certificates, etc. The ticket number is also provided for you if you need to look up ticket information or if you need to recall a ticket to make changes. This is a useful tool to determine how "Good" a customer this is.

28. The "Prepaid Item Availability" section of this screen can be used to view the available prepaid items for the client.

This area of the screen keeps track of all prepaid items the customer has purchased. It shows the period of time or number of uses purchased and remaining. These prepaid items are also displayed above in the Order History section of this screen.

29. Click on the "Purchases" tab below the Client Id field.

Client Purchases Tab



30. Use this screen to view the items that have been purchased for the selected client. You may also show only a select group of purchases.

This screen displays all the products this client has purchased. This will be very valuable when the clients ask

"What was the name of that product I bought last month?" type questions.

31. Click on the "Notes" tab.

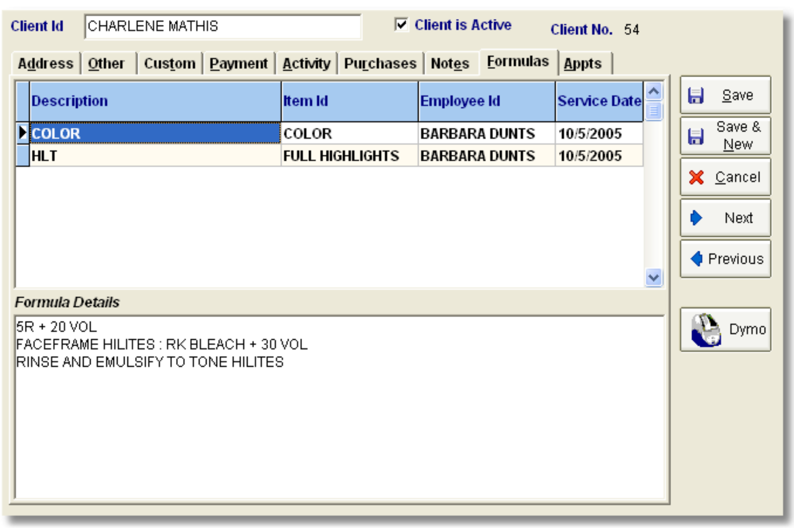
Client Notes Tab

32. Enter any notes that you may need to keep on record for the client (optional). These notes can pop up when the client is selected in the Appointment Calendar or Point of Sale.

Use this screen for any general notes you wish to make about a client. It is text only and unlimited in the amount of text it will contain.

33. Click on the "Formulas" tab.

Client Formulas Tab

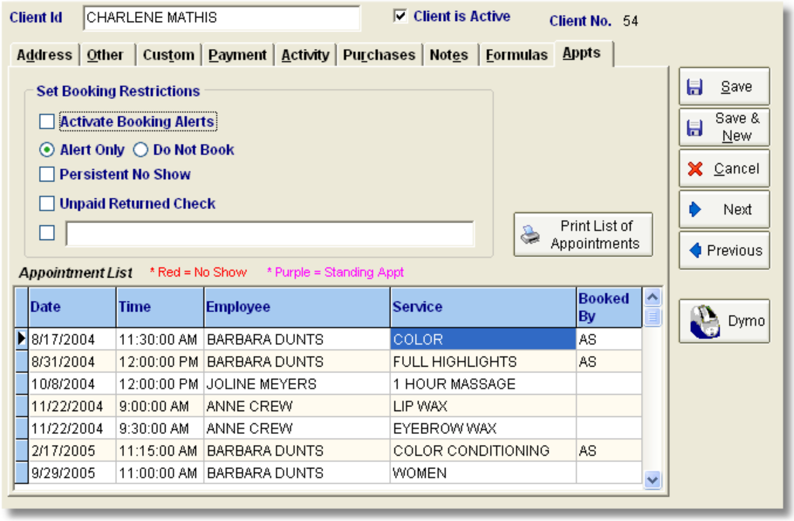


34. Use this screen to view the formulas saved for the client.

This screen shows all the formulas entered into the system that apply to the selected client.

35. Click on the "Appts" tab.

Client Appts Tab



This screen allows you to set booking restrictions for a client and also allows you to view the client's appointments for quick reference. If Booking Restrictions are activated, a pop up window will appear when the client is selected for an appointment.

36. Check the "Activate Booking Alerts" check box if you would like to set Booking Restrictions for the client.

This check box is used to turn on the Booking Restriction.

37. Select "Alert Only" or "Do Not Book".

These options will alert the employee that there is a booking restriction or will not allow the employee to schedule an appointment for the client.

38. Check "Persistent No Show", "Unpaid Returned Check" or the last option that allows you to enter any reason you wish.

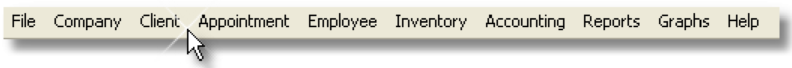
Depending on the selection, a reason will be displayed for the Booking Restriction.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

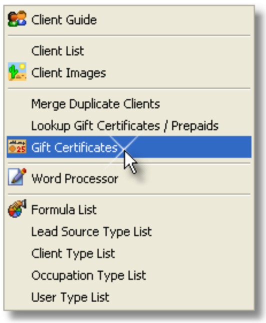
Gift Certificates

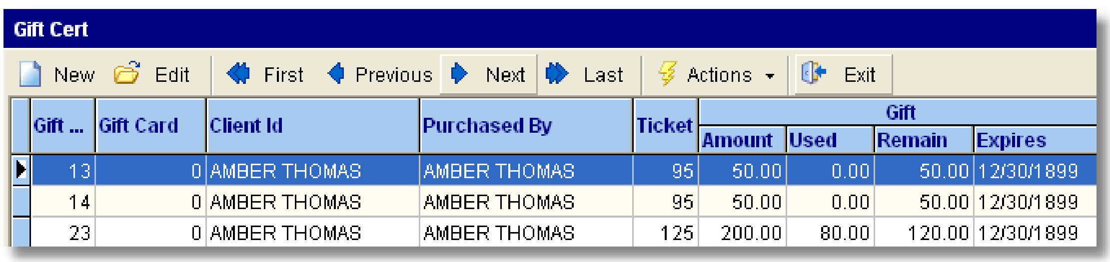
The Gift Certificate list allows you to manually enter or edit gift certificates. You may have gift certificates that have been sold previously that still have remaining balances. These gift certificates will need to be entered in this list so that they may be redeemed in the Point of Sale.

1. Click on "Client" in the Menu Bar at the top of the screen.



2. Select "Gift Certificates" from the drop down menu.

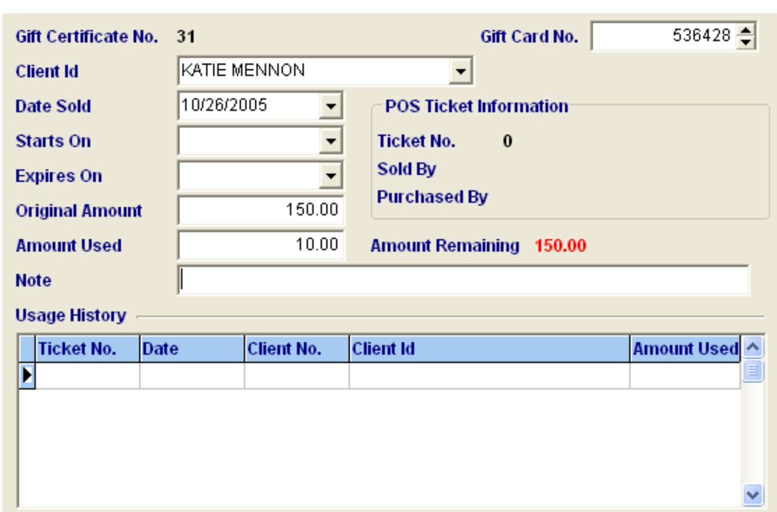




Gift ...	Gift Card	Client Id	Purchased By	Ticket	Gift Amount	Used	Remain	Expires
13	0	AMBER THOMAS	AMBER THOMAS	95	50.00	0.00	50.00	12/30/1899
14	0	AMBER THOMAS	AMBER THOMAS	95	50.00	0.00	50.00	12/30/1899
23	0	AMBER THOMAS	AMBER THOMAS	125	200.00	80.00	120.00	12/30/1899

A list of your gift certificates will appear. This list may be empty if you have not sold any gift certificates or entered any in this list

3. Click the "New" button to add a new Gift Certificate to the list or click the edit button to edit a Gift Certificate.



4. Select the Client Id of the client you are entering a gift certificate for.

The client that should be entered into this field is the client that will be using the gift certificate. You may select the client from the drop down menu.

5. Enter the dates for the gift certificate.

- **Date Sold:** Enter the date that this gift certificate was sold on.
- **Starts On:** Enter the date that the client can start using this gift certificate.
- **Expires On:** Enter the expiration date of this gift certificate.

6. Enter the amounts for the gift certificate.

- **Original Amount -** Enter the amount that the client paid for this gift certificate.
- **Amount Used -** Enter an amount that was used.

7. Enter a note for this gift certificate if needed.

You may need to specify what this gift certificate was purchased for or specific information about the usage of this gift certificate.

8. Swipe a gift card into the "Gift Card No." field or enter a specific number for the gift certificate.

If you use gift cards, you may use this field to enter the card number. Click in this field so that the cursor is blinking (erase the zero if there is a zero in this field) and swipe the card. The card number will automatically appear in this field. You may also use this field to enter a specific number for this gift certificate or card.

9. You may review the "POS Ticket Information" if you are editing a gift certificate.

This area will show ticket information if the gift certificate was sold through the POS window of the program.

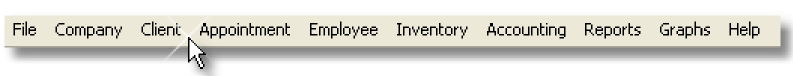
10. Review the "Usage History" if you are editing a gift certificate.

This area will show the ticket information if this gift certificate has been used in the POS window.

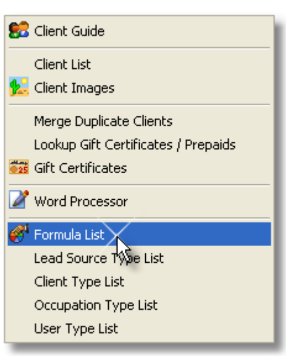
Client Formulas

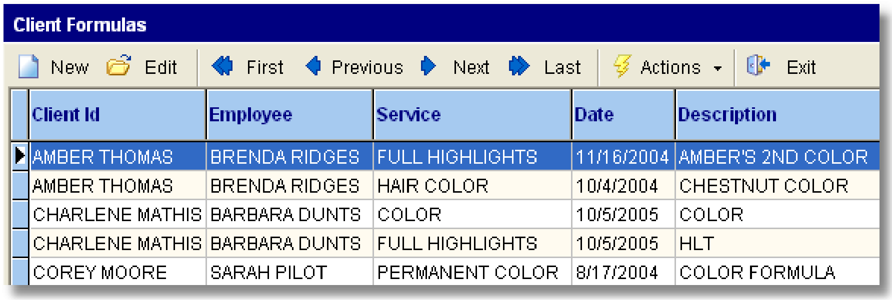
The Formula screen shows the instructions for custom mixing products to satisfy a particular client.

1. Click on "Client" on the Menu Bar at the top of the screen.



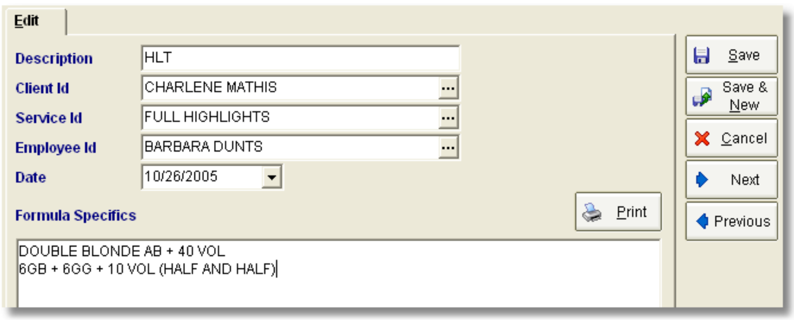
2. Select "Formula List" from the drop down menu.





A list of formulas will appear. This list may be empty if you have not entered any formulas

3. Click the "New" button to add a new formula to the list or click the "Edit" button to edit an existing Formula.



4. Enter a Description for the formula you are entering.

Enter an abbreviated description of the formula. This description should be easily understandable from the formula listing.

5. Select the Client Id of the client you are entering a formula for.

Select from the drop down list the Client this formula applies to. Click the small button to see the list of clients. If this client isn't in the system, you may add them in the Client List.

6. Select the Service Id of the service this formula is for.

Enter the specific service that this formula applies to.

7. Select the Employee that created this formula.

Click the small button to see a list of employees. Select the employee that developed the formula or who uses the formulation of products for the client.

8. Edit the date if necessary.

Today's date is automatically inserted, but you may click the small button in this field and select another date.

9. Enter the Formula in the "Formula Specifics" field.

Type the description of the formula in this space. Be as specific and clear as possible. In the future, someone else may have to duplicate the formula for this client.

10. Click the "Print" button to print the formula (optional).

Click the "Print" button to get a paper copy of this formula.

Client Worksheet

Use this worksheet to practice using the Client screens in the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own information in your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

1. Open the Client List and add the following clients to the list:

- Client Name: Christine Jones
- Address 1: 104 Grenville Ave
- City: Orlando
- State: Florida
- Zip: 32811
- Phone: 555-555-5555
- Gender: Female
- Birthdate: 6-11-1971
- Lead Source: Newspaper Ad
- Referred by Client: Joyce Meyers

- Client Name: Kathy Martinez
- Address 1: 5638 Highland Park Ave
- Address 2: Apt. # 304
- City: Orlando
- State: Florida
- Zip: 32811
- Phone: 555-555-5555
- Gender: Female
- Birthdate: 10-12-1968
- Lead Source: Yellow Pages
- Referred by Employee: Martha Stalward

2. Open the Gift Certificates list and add the following gift certificate to the list:

- Client: Christine Jones
- Date Sold: 10/26/2005
- Original Amount: $150
- Amount Used: $10
- Gift Card No.: 2653489

3. Open the Formula List and add the following formula to the list:

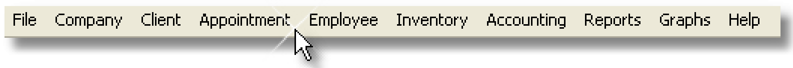
- Description: Color
- Client: Christine Jones
- Service: Color
- Employee: John Warder
- Formula Specifics: 5RB AND 6NW AND 5NW MIXED WITH 10 VOLUME

Notes

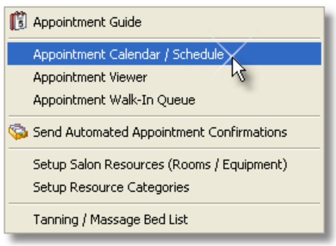
Appointment Calendar

Calendar Overview

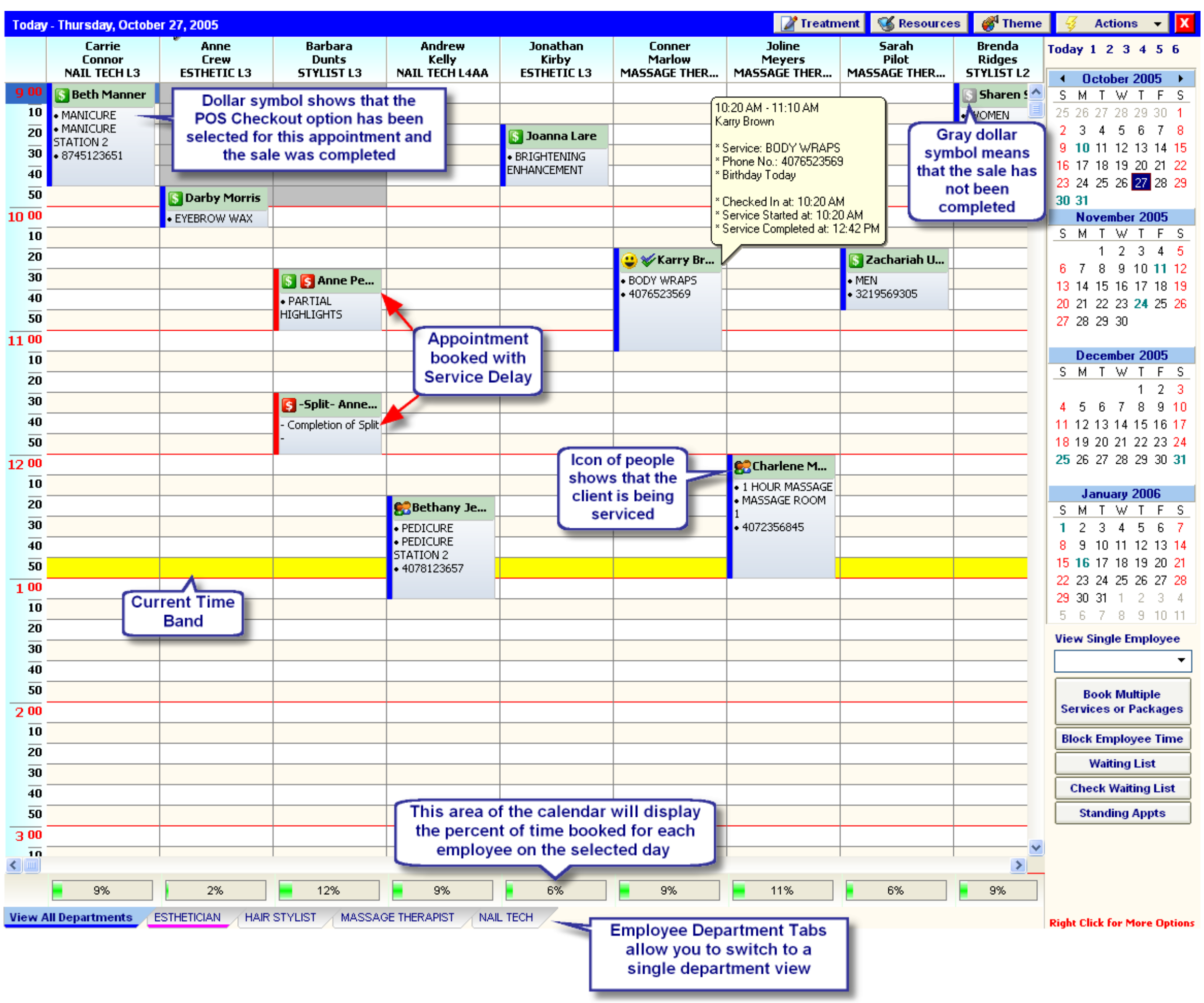
1. **Click on "Appointment" on the Menu Bar at the top of the screen.**



2. **Select "Appointment Calendar /Schedule" from the drop down menu.**



Note: You may also click on the "Calendar" button on the Tool Bar.

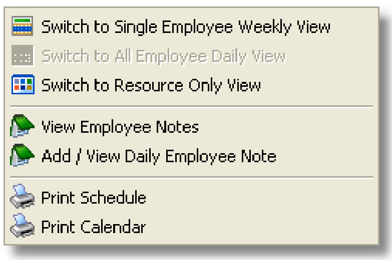


The Appointment Calendar has many features and tools. This section of the guide will explain how to view the calendar.

Appointment Employees and Resources

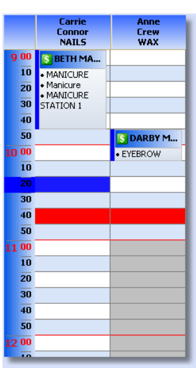
The top row of the Appointment Calendar displays the Employee's and Resources you have available for appointments. The employees will have their scheduled time (set employee schedules by selecting "Employee Schedule" from the "Employee" menu.) shown in blue and white. Their off times will be shown in gray. When you rest your mouse arrow over the employee's column, a magnifying glass will appear with either a minus or plus symbol. When this is visible you may left click to either make the column width larger or smaller depending on the symbol that is displayed on the magnifying glass.

Right Click Options - When you right click on an employee's column on the top row of the Appointment Calendar, you will receive the following window:



- **Switch to Single Employee Weekly View -** Select this option to change the calendar view to display a full week schedule for the selected employee.
- **Switch to All Employee Daily View -** Select this option to switch back to the regular calendar view when you are using the Single Employee Weekly View.
- **Switch to Resource Only View -** Select this option to display appointments by the resource. The resources will be displayed in the employee columns.
- **View Employee Notes -** Select this option to view any notes that you may have entered into the employee list for the selected employee. You may also add or edit notes that you have entered for the selected employee.
- **Add / Edit / View Daily Employee Notes -** This option will allow you to add, enter, or view a daily note for the selected employee.
- **Print Schedule -** Select this option to print the selected employee's schedule.
- **Print Calendar -** Select this option to print the employee's schedule in the calendar format. This printed schedule will look like the Appointment Calendar.

Appointment Calendar Time



The time you have set for your store hours when you setup the program, are the range of times shown on this column. You set store hours by selecting "Setup Program Preferences" from the "Company" menu. By default, this will encompass the Store Hours you set.

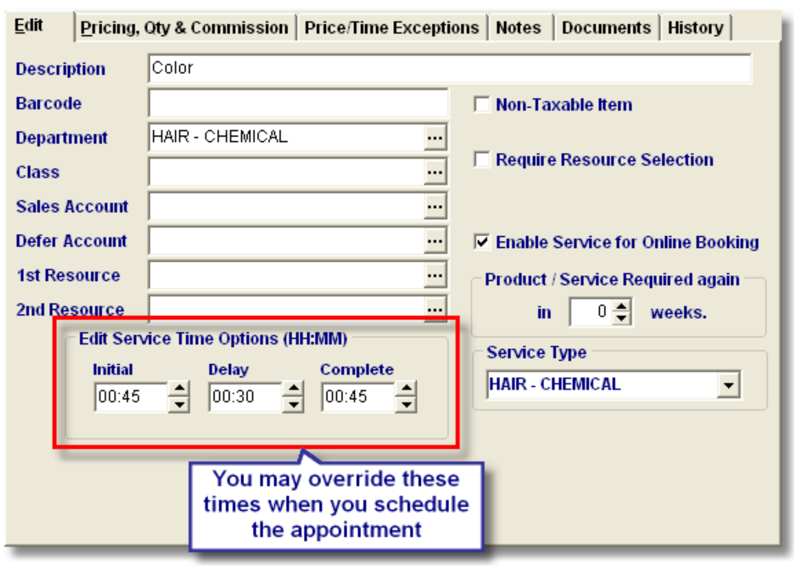
Appointment Time Slots

Note: Double click any available time slot on the calendar and you will be able to create a new appointment.

These are the time slots that are available for booking appointments. Just double click on a time slot under an employee's column and a **"Schedule Appointment"** window will open for you to book an appointment. You may also left click on the start time of an appointment under an employee's column so that the time slot is highlighted and then right click in the calendar and select **"New Appointment"** from the menu. You can also click on a time slot and holding down the mouse left click button, drag the cursor over multiple time slots to select them. This comes in handy for blocking out some time that an employee isn't available for appointments. Drag down the time slots, right click and select **"Block Employee Time"**. Click the "OK" button to approve the time to be blocked. The times will be automatically entered for you.

Service Delay Appointment

A delay service is a service that requires a period of time to elapse between the first part of the service and the final part. For example, if you have a service for coloring hair, it takes an amount of time to apply the color, then it must stay on the hair for a set period of time, and then it must be neutralized to finish the service. If it takes 30 minutes to apply the color and then it must sit on the hair for 30 minutes, and finally, it is neutralized which takes 15 minutes, this is what the appointment looks like. This program allows this type of Inventory Service item so that the employee is available for other appointments during the delay. If you move this appointment, both parts move since the program treats both parts as one appointment. The image shown below is a screen shot of a Delay Service item being added in Inventory.



Appointment Calendar Icons

There are different icons that are used in the Appointment Calendar to display information about the appointment. Below is a listing a the different icons:

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "Confirm Appointment - Talked to Client.

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "Confirm Appointment - Left Message.

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "Check In".

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "Begin Servicing Client".

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "Finish Servicing Client".

- This icon will appear on the appointment when you have right clicked on top of the appointment and selected "POS Check Out".

- This icon will appear on the appointment when a client has a balance due from the "On Acct" payment type. This means that the "On Acct" payment type was selected as payment for one of this client's sales transactions and payments were not made on the "Pay On Account" screen to eliminate the balance due.

- This icon will appear when you have not selected Check In, Begin Servicing Client, Finish Servicing Client, or POS Check Out from the right click menu options.

- This icon will appear when the sale for the service scheduled has not been completed.

- This icon appears when the client has a birthday during the week of their appointment.

- This icon appears when a client has requested to not be contacted for appointment confirmations.

- This icon appears when a note has been entered on the "Daily" tab of the client notes area of the schedule appointment screen.

Appointment Dates

Use these calendars to select the date you wish to set appointments for. The single arrows at the top will jump 1 month ahead or behind. Just click any day displayed to switch the appointment schedule to that day. Click the word "**Today"** to force the calendar to today's schedule. This is handy after you have been setting appointments for various dates in the future and want to display today's schedule of appointments.

Note: The small blue word "Today" with the numbers 1 to 6 above the calendar jump exactly 1, 2 or up to 6 weeks ahead on the calendar.

Calendar View

Select either All Employees or a Single Employee to display on the appointment calendar. If you choose Single Employee, you must select an employee using the Employee ID field. Click the small button with the down arrow to display a list of your employees.

Appointment Calendar Buttons

Book Multiple Services or Packages: Click this button and the program opens a screen that allows you to select multiple services or a package and the program will automatically scan for available appointment times. This is a very fast way to find an open appointment time while dealing with the clients call.

Block Employee Time: Click this button to set a period of time that the employee is not available. If you first drag across a block of time on the schedule for an employee, then click this button, the times will be filled in automatically.

Waiting List: This button allows you to add an appointment to the Waiting List.

Check Waiting List: Click this button and the program will automatically check the waiting list and employee time slots and present you with appointments that can be booked.

Standing Appts: This button will allow you to create standing appointments.

Calendar Column Percentages

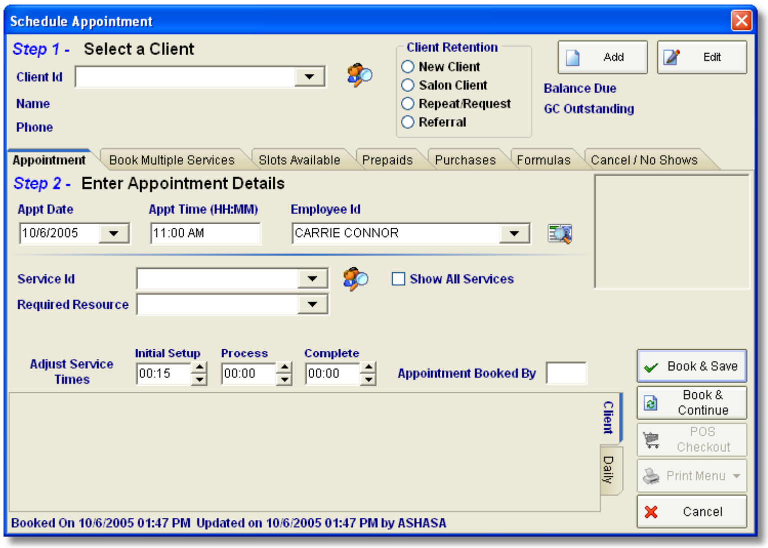
This area of the calendar will display the percent of time booked for each employee on the selected day.

Calendar Department Tabs

This area of the Appointment Calendar will allow you to change the view of the employees to a single department. The tabs displayed here are of all the employee departments that you have entered into the program. When you click on a tab, the calendar will display only the employees that are associated with the selected department. To create, add to, or edit this list, click on "Employee" from the menu bar and select "Employee Department List" from the drop down menu. You may also choose which department tabs will be available in the Appointment Calendar. The option "Show Department in Appointment Calendar" is available when adding or editing a department in the Employee Department List.

Scheduling an Appointment

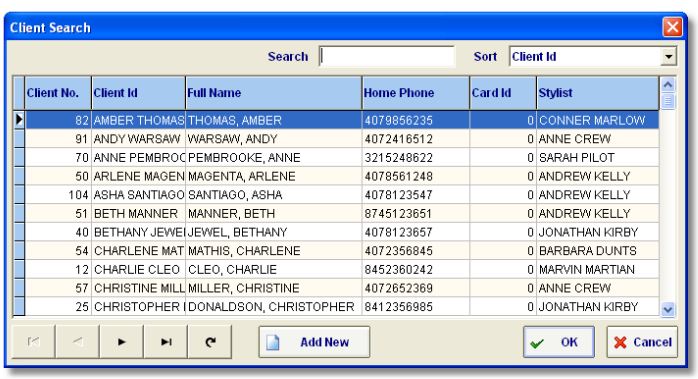
1. Double left click on a time slot in the correct employee's column for the appointment you would like to schedule.



This is the working screen for the Appointment Calendar. There are many powerful features available on this screen.

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

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. Click on the button to the right of the Client ID field to populate the Client Search screen. This button will open a list of your clients. Click the "Add New" button to add a client to this list.



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 for the appointment you are scheduling.

Click the small button and select from the listing 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.

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.

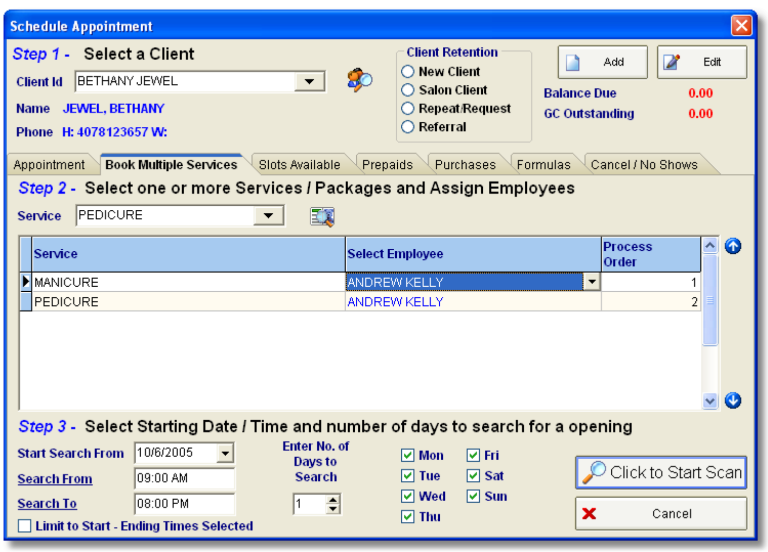
7. Enter your initials in the "Appointment Booked By" field if required.

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 & Continue" 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 & Continue:** 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.

Booking Multiple Services



A powerful, timesaving feature of the program is the ability to automatically book services or packages. This feature gives you the ability to instantly find available appointments that have the resources and qualified employees available.

1. Select the Client.

Select the client for the services or package.

2. Select the first service or Package.

Once again, click the small button with the drop down arrow for a list of all your services and packages. You may click the search button to the right of the Service field for a complete service listing. You can continue to add Services and Packages to the Service / Package listing by repeatedly selecting from the "Service" field. If a Package is selected, all of the services included in the package will be added to the list. If you selected more than one service, you may use the small arrow buttons to the right of the Service / Package listing to move individual items up or down in the list. This will determine in what order the services will be automatically scheduled by Envision.

3. Select the employees that will be performing these services (optional).

Select an employee for each service or package shown by clicking in the fields that display "First Available". Select the employee with the drop down arrow. This is critical since the program will search forward in time only for open time slots for those employees. You may also select "First Available" for the employee and the program will search for available times with any employee. If you have the program setup to check for qualified services, the program will only search through the employees that have the selected service listed as a service that they are qualified to perform.

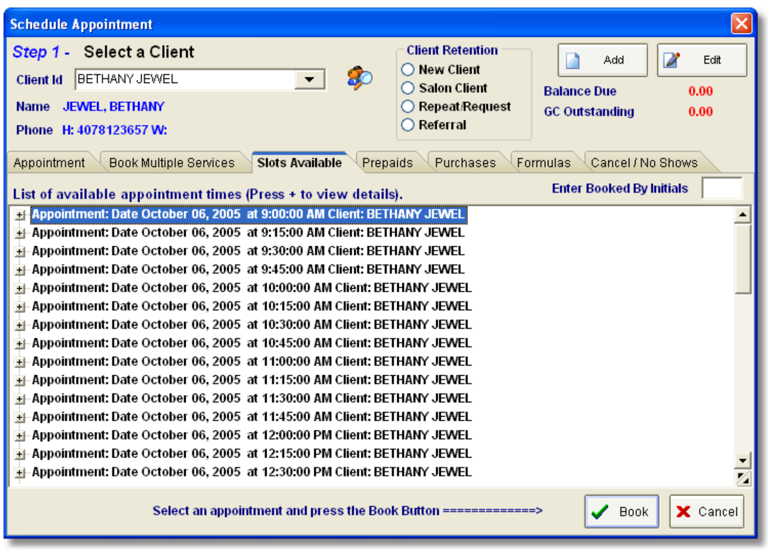
4. Select a "Start Search From" date and specify the time and days of the week if the client has requested specific times and days. Check the "Limit to Start - Ending Time Selected" check box if you would like to limit the search to these times and days of the week. If you are searching for times for more than one day, enter the number of days in the "Enter No. of Days to Search" field.

The date and time you set in the "Start Search From" fields will determine how the scan works. It defaults to the current date and time. When you click "Scan" it will start searching from the date and will only search each day from the time you have set.

5. Click the "Click to Start Scan" button when you are ready to search for available appointment times.

Click this button to start the scan for available appointments. When the scan is complete the program will automatically move to the "Slots Available" screen and you may then select an appointment to book.

Slots Available Tab

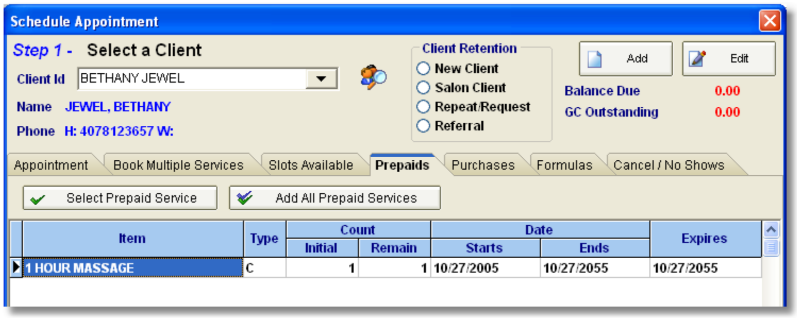


After clicking the "Click to Start Scan" button, the program will jump to this tab to display available appointment time slots.

6. Select an Appointment and click the "Book" button at the bottom of this screen.

If you searched for multiple services / packages, click the small box with the "+" sign to drop down the appointment times for these various services. The time, service, employee and resource will be displayed. Click on one that is suitable and click the "Book" button.

Prepaids Tab



These screen will display all the prepaid items that the selected client has purchased.

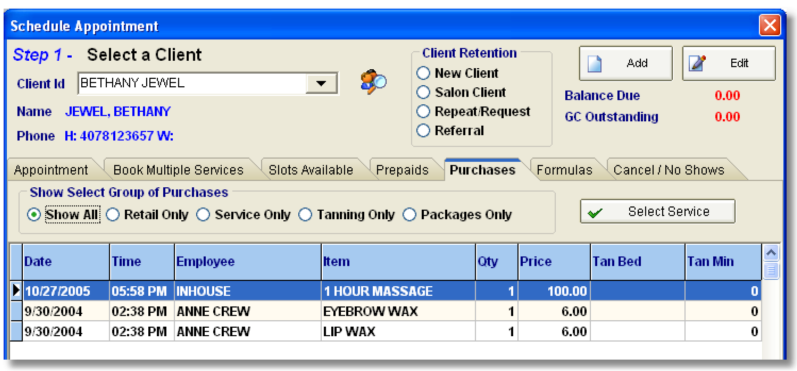
1. Click the "Select Prepaid Service" button if you would like to schedule an appointment for one of the selected client's prepaid items.

Click this button to select the highlighted service for the appointment you are booking. This option will automatically move you to the "Appointments" tab and the prepaid service will be entered into the Service Id field.

2. Click the "Add All Prepaid Services" button if you would like to schedule appointments for all of the selected client's prepaid items.

Click this button to move all of the prepaid services into the service fields on the "Book Multiple Services" tab.

Purchases Tab



Click this tab to find out what the client has purchased. This will be very valuable when the clients ask "What was the name of that product I bought last month?" type questions.

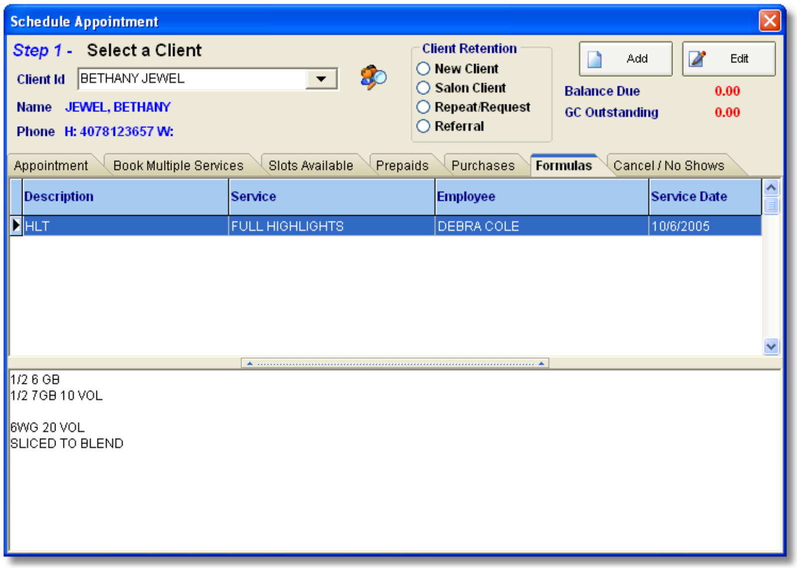
1. Select a specific group or "Inventory Type".

Select the type of purchases that you would like to display in this list.

2. Select a Service item and click the "Select Service" button to schedule an appointment for the selected client and service.

Click this button to select the highlighted service for the appointment you would like to schedule. This option will automatically move you to the "Appointments" tab and the service will be entered into the Service Id field.

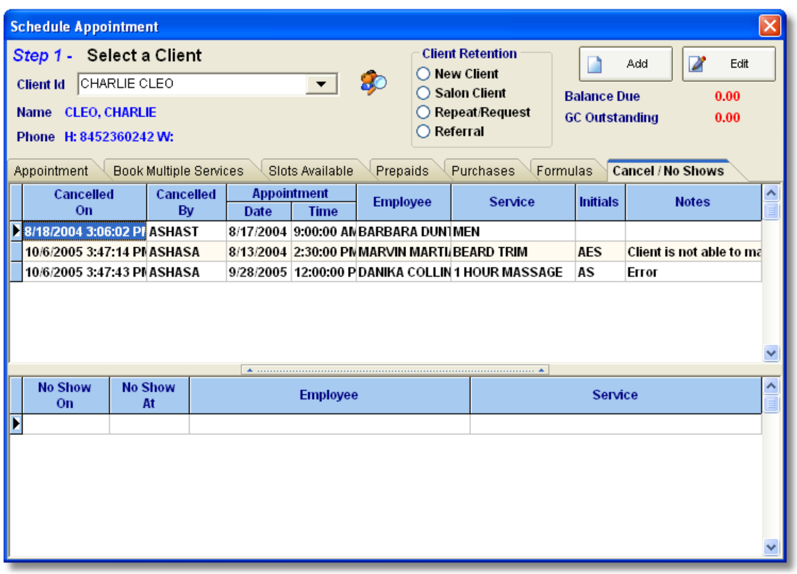
Formulas Tab



Formula List

This window will show a list of formulas and formula specifics for the selected client.

Cancellations Tab



Cancellation List

This screen will show all the cancellations this client has made. This is important if the client has a history of canceling appointments. The above screen will appear showing in list format all cancellations made by this client. It is important to enter a reason when cancelling an appointment so that when you review this list of cancellations you will be able to determine which appointments the client canceled and why.

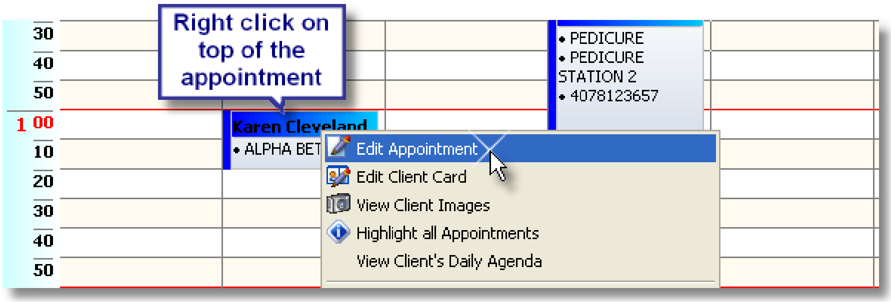
Notes

Calendar Features

Editing Appointments

Select this option if you need to make changes to the scheduled appointment.

1. Right click on top of the appointment.



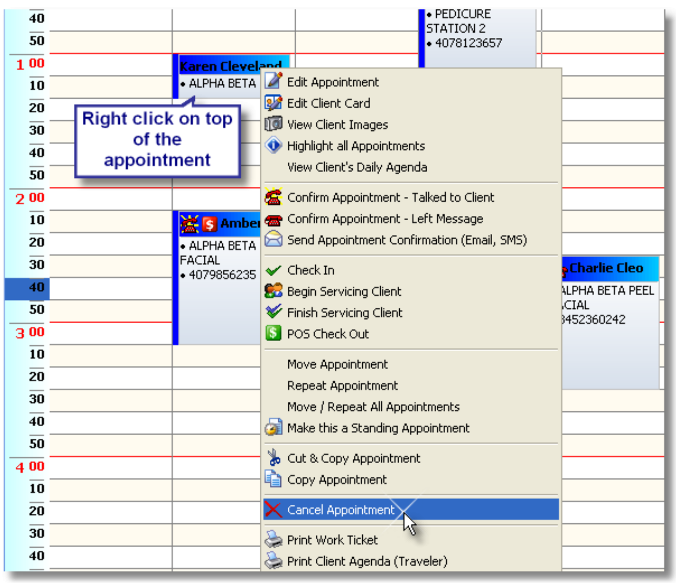
2. Select "Edit Appointment" if you need to make changes to a scheduled appointment.

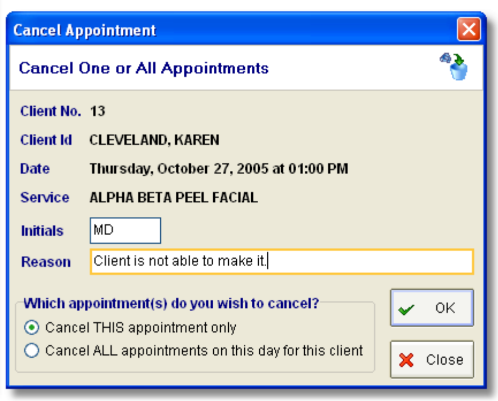
Note: You may also double left click on top of the appointment to open the scheduled appointment.

Canceling Appointments

Select this option if you need to cancel the existing appointment. This option will remove the appointment from the calendar.

1. Right click on top of the appointment.





2. Select "Cancel Appointment" from the menu.

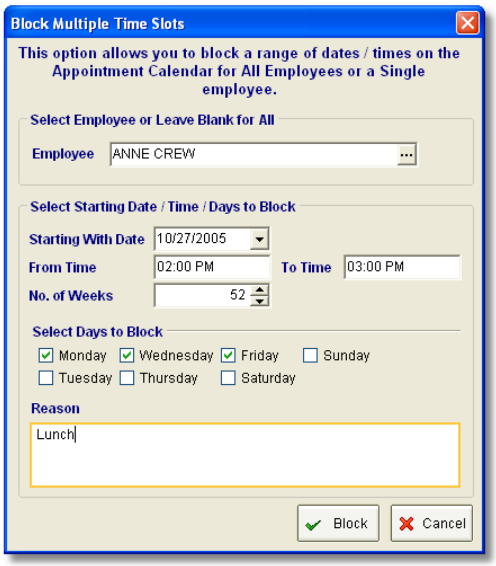
The initials of the person that is canceling the appointment can be entered as well as a reason.

3. Click the "Ok" button to cancel the appointment.

Block Employee Time

Use this feature to block time in the calendar for an employees lunch, an appointment or any time that they will be away from the salon or spa during their scheduled hours.

1. Click on the "Block Employee Time" button on the right side of the calendar.



2. Select the Employee that you would like to block time for.

If you need to block time for every employee in the calendar, leave the Employee selection blank.

3. Select the "Starting With Date".

Select the date of the first day this time will be blocked for.

4. Enter the "From Time" and "To Time".

Enter the time that will be blocked each day.

5. Enter the "No. of Weeks" that this time must be blocked.

If the time you are blocking will be the same for a period of time, enter how many weeks.

6. Select the days of the week for the time you are blocking.

If the time you need to block is for specific days of the week, check the box to the left of each day.

7. Enter a reason for the time you are blocking.

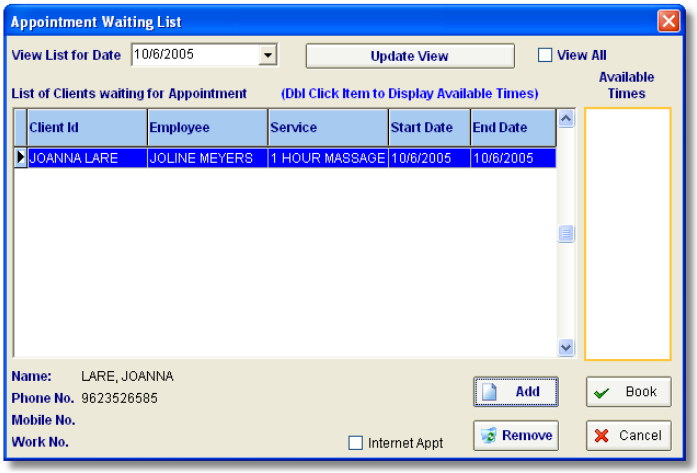
An example for a reason could be "Lunch" or "Medical Appointment".

8. Click the "Block" button.

Note: You can also click on a time slot and holding down the mouse's left click button, drag the cursor over multiple time slots to select them. This comes in handy for blocking out time for one day that an employee will not be available for appointments. Drag your mouse arrow down the time slots, right click and select "Block Employee Time". The times will be automatically entered for you. Enter a reason and click the "OK" button to approve the blocked time.

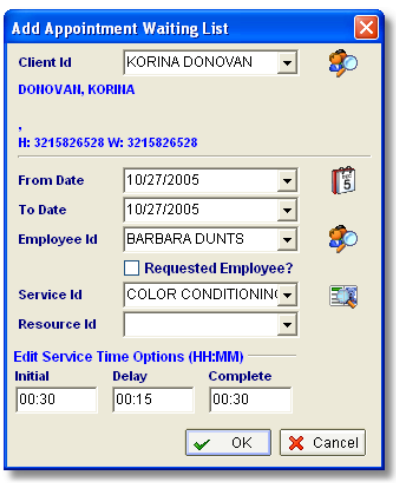
Waiting List

1. Click the "Waiting List" button on the right side of the calendar.



This screen allows you to view and manage the waiting list.

2. Click the "Add" button on the Waiting List screen.



3. Select the Client for the appointment you would like to add to the Waiting List.

4. Select the "From Date" and "To Date".

These dates will determine how long they will remain in Waiting List. Available Time will be displayed for these dates.

5. Select the Employee and Service for the appointment you are adding.

6. Click the "Ok" button to add the appointment to the list.

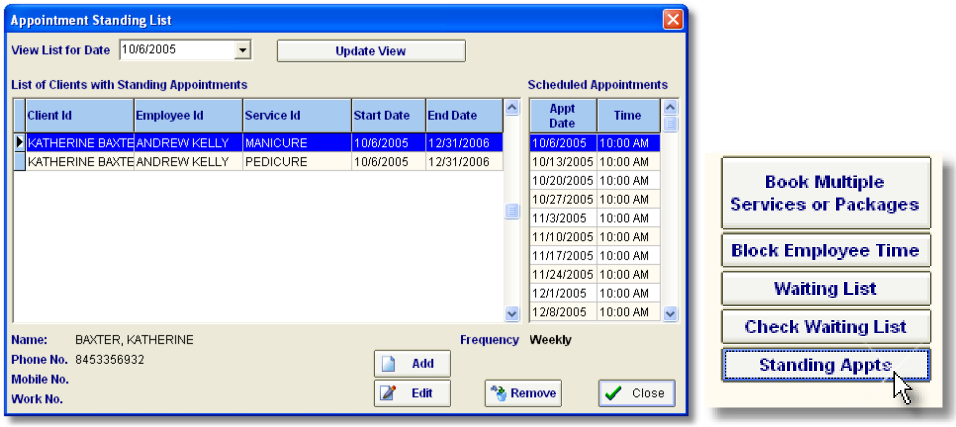
7. Double Left Click on top of the appointment in the Waiting List when you want to view the Available Times.

Note: If "Auto Check Waiting List" is checked in your Program Preferences, the calendar will pop up a screen with available times when a client cancels an appointment during the dates selected for the appointments that have been added to the Waiting List.

Standing Appointments

This screen will allow you to add standing appointments to the Appointment Calendar.

1. Click on the "Standing Appts" button on the right side of the calendar.



2. Click the "Add" button on the Standing Appointments screen.

3. Select the Client for the appointment you would like to add as a Standing Appointment.

4. Select the "From Date" and "To Date".

The program will schedule appointments between these dates depending on the frequency you select.

5. Enter the "Appt Time".

6. Select the Employee and Service for the appointment you are adding.

7. Click the "Ok" button to add the appointment. The program will automatically schedule the appointments in the calendar.

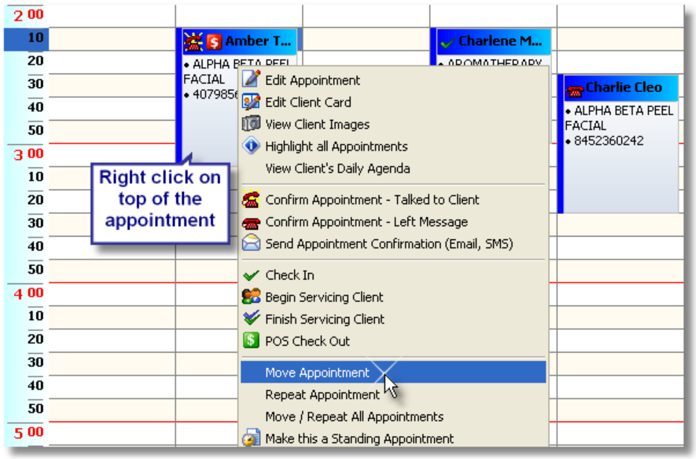
If there are any conflicts with the appointments you are scheduling, a pop up will appear with a list of appointments that are already scheduled.

Note: You may also make an existing appointment a Standing Appointment by right clicking on top of the appointment and selecting "Make this a Standing Appointment".

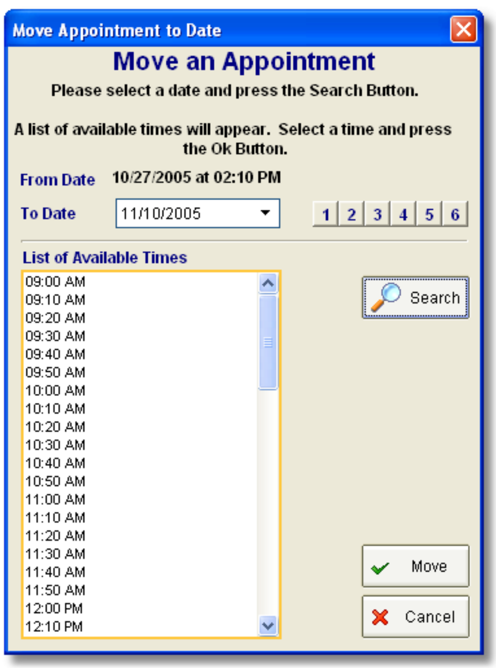
Move an Appointment

Use this feature to move an existing appointment to a different date.

1. Right click on top of the appointment.



2. Select "Move Appointment" from the menu.



3. Select the date that you would like to move the appointment to and click the "Search" button.

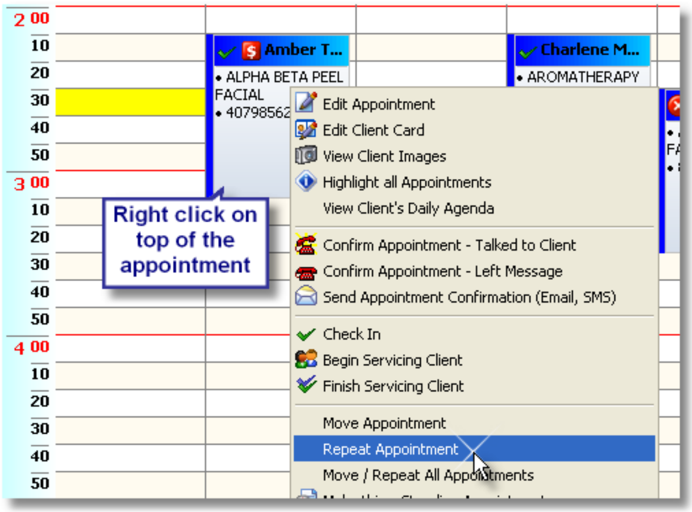
4. A list of Available Times will appear. Select the desired time and click the "Move" button.

Note: You may also drag and drop appointments if you would like to move an appointment to a different time slot on the same day. If a client has multiple appointments scheduled on the same day and you would like to move all of these appointments to a different day, select the "Move/Repeat All Appointments" option instead of the "Move Appointment" option.

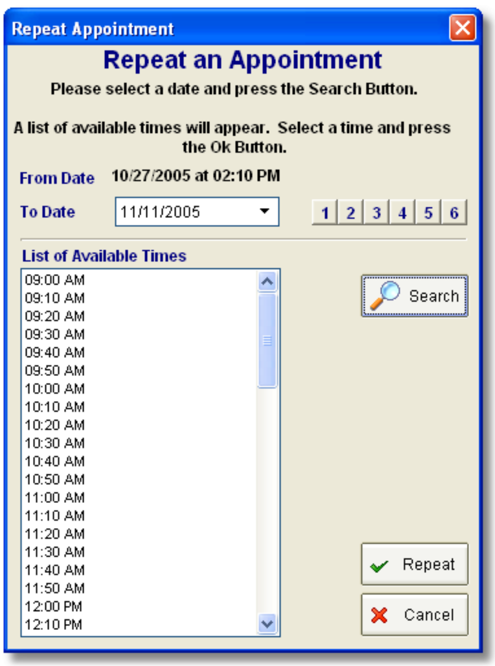
Repeat an Appointment

Use this feature to repeat an existing appointment.

1. Right click on top of the appointment.



2. Select "Repeat Appointment" from the menu.



3. Select the date for the repeat the appointment and click the "Search" button.

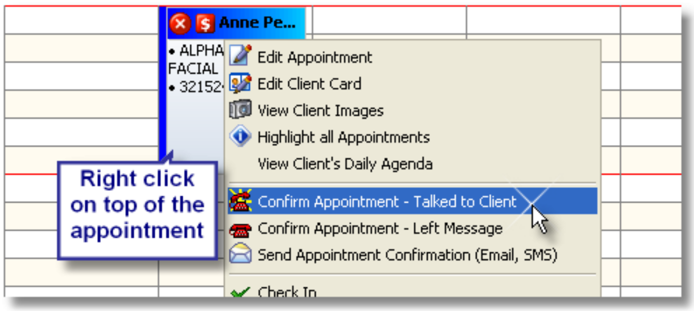
4. A list of Available Time will appear. Select the desired time and click the "Repeat" button.

Note: If a client has multiple appointments scheduled on the same day and you would like to repeat all of these appointments, select the "Move/Repeat All Appointments" option instead of the "Repeat Appointment" option.

Confirm Appointments

There are three available selections for confirming appointments in the calendar.

1. Right click on top of the appointment.

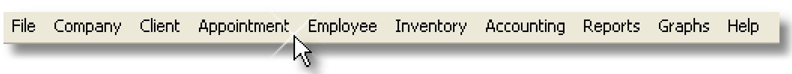


2. Select "Confirm Appointment - Talked to Client", "Confirm Appointment - Left Message" or "Send Appointment Confirmation (Email, SMS)".

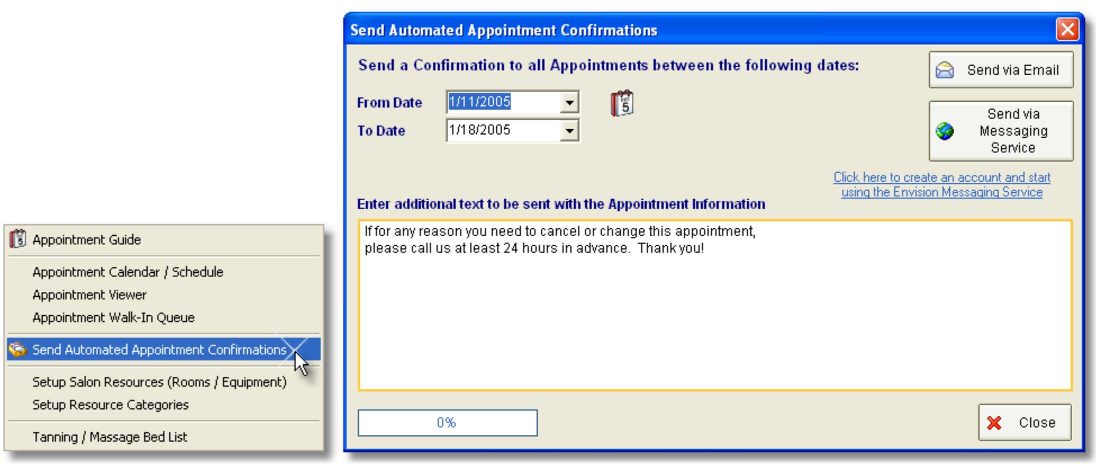
- **Confirm Appointment - Talked to Client:** Select this option to place an icon on the appointment that shows that this appointment was confirmed and someone has spoken with the client.
- **Confirm Appointment - Left Message:** Select this option to place an icon on the appointment that shows that this appointment was confirmed by a message that was left for the client.
- **Send Appointment Confirmation (Email, SMS):** Select this option to send an appointment confirmation by email to the selected client. Your email settings must be configured correctly for this to work.

You may also send a mass emailing to all appointments between a selected date range.

1. Click on "Appointment" on the Menu Bar at the top of the screen.



2. Select "Send Automated Appointment Confirmations" from the drop down menu.



3. Select the date range for the appointments that need to be confirmed.

4. Enter the message you would like to send to all recipients of this email. Each client will receive this exact message in their email inbox.

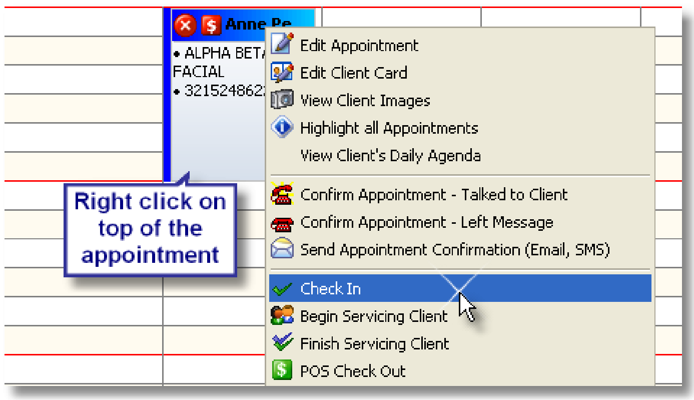
5. Click the "Send Via Email" button.

Note: You must be connected to the Internet before clicking the "Send" button.

Check In / Begin Service / Finish Service

You may place icons on top of appointments to let you know what the status of the appointment is. This is useful when you are busy and need to find out who has been helped, who is waiting to be serviced and who needs to be checked out.

1. Right click on top of the appointment.



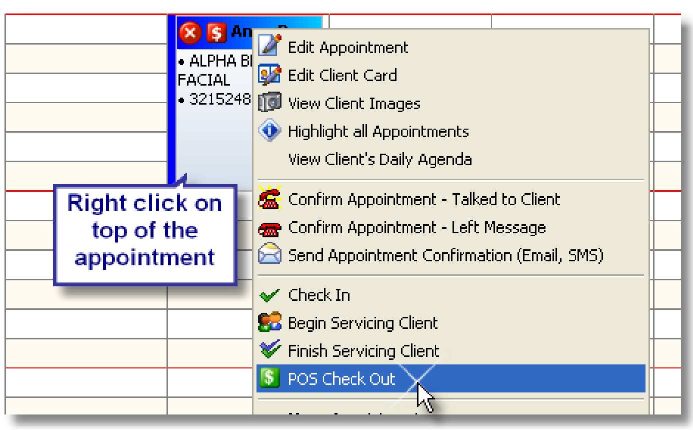
2. Select "Check In", "Begin Servicing Client" or "Finish Servicing Client" to place an icon on the appointment.

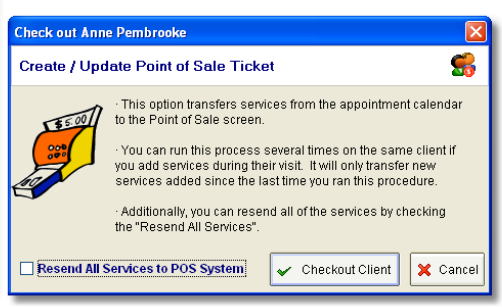
- **Check In:** Select this option to place an icon on the client's appointment to show that they have arrived.
- **Begin Servicing Client:** Select this option to place an icon on the appointment to show that the client is with the service provider.
- **Finish Servicing Client:** Select this option to place an icon on the appointment to show that the client's appointment is finished and they are ready to be checked out.

POS Checkout

The POS Checkout feature transfers services from the Appointment Calendar to the Point of Sale screen. You can run this process several times on the same client if you add services during their visit. It will only transfer new services added since the last time you ran this procedure. Additionally, you can resend all the services by checking "Resend All Services" in the lower left hand corner.

1. Right click on top of one of the client's appointments.





2. Select "POS Check Out" from the menu.

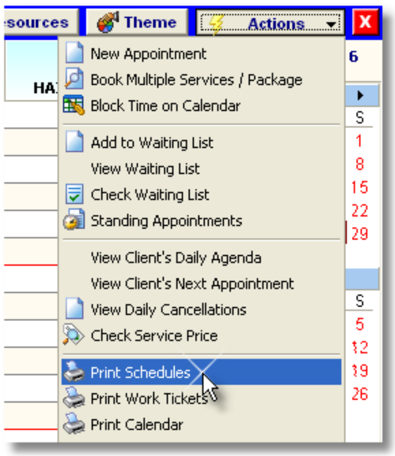
3. Click the "Checkout Client" button.

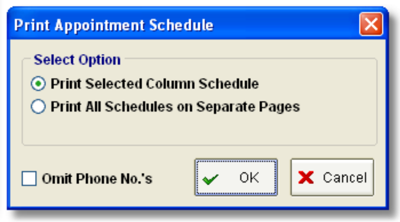
The services will be transferred to the Point of Sale.

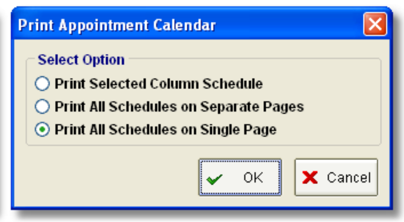
Print Schedules

You may choose to print schedules for the service providers if you would like them to have a print out of their appointments for the day. There are two available formats for the appointment schedules.

1. Click the "Actions" button in the upper right hand corner of the calendar.







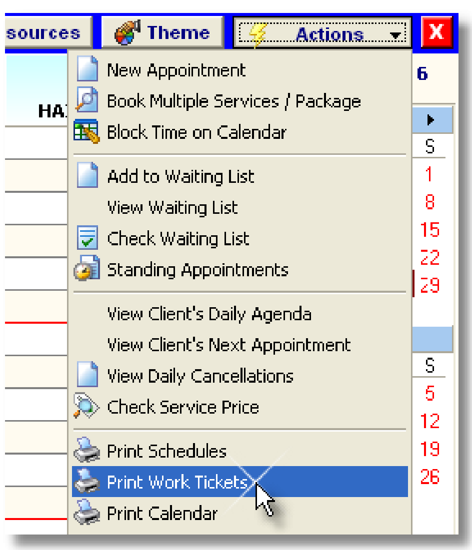
2. Select "Print Schedules" or "Print Calendar".

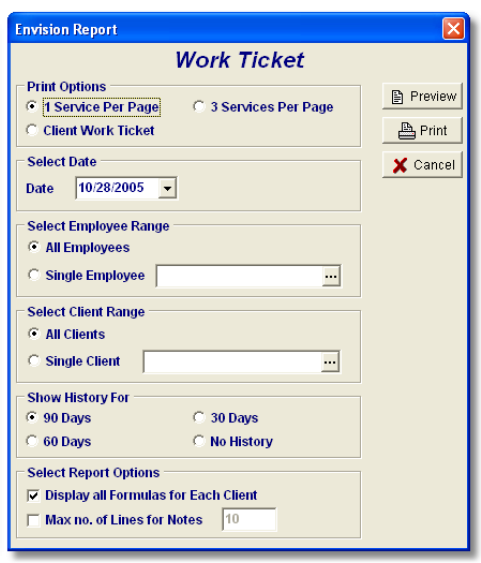
- **Print Schedules:** Clicking this button will present you with a screen offering two choices. You can print a schedule for the column you have selected or you may select to print "All" schedules.
- **Print Calendar:** You may choose to print the Selected Column Schedule or All Schedules on Separate Pages or on a single page. The "Print Calendar" option will print the schedule in the calendar format.

Print Work Tickets

This option allows you to print (with a screen preview) the work tickets for a single employee or all employees. You can select a date and choose to display 30, 60, or 90 days history.

1. Click the "Actions" button in the upper right hand corner of the calendar.





2. Select "Print Work Tickets" from the menu.

3. Select the type of work ticket in the "Print Options" section.

The "Client Work Ticket" option will print all the services a client may have scheduled for the same day on one ticket.

4. Select a Date for the appointments you would like to print work tickets for.

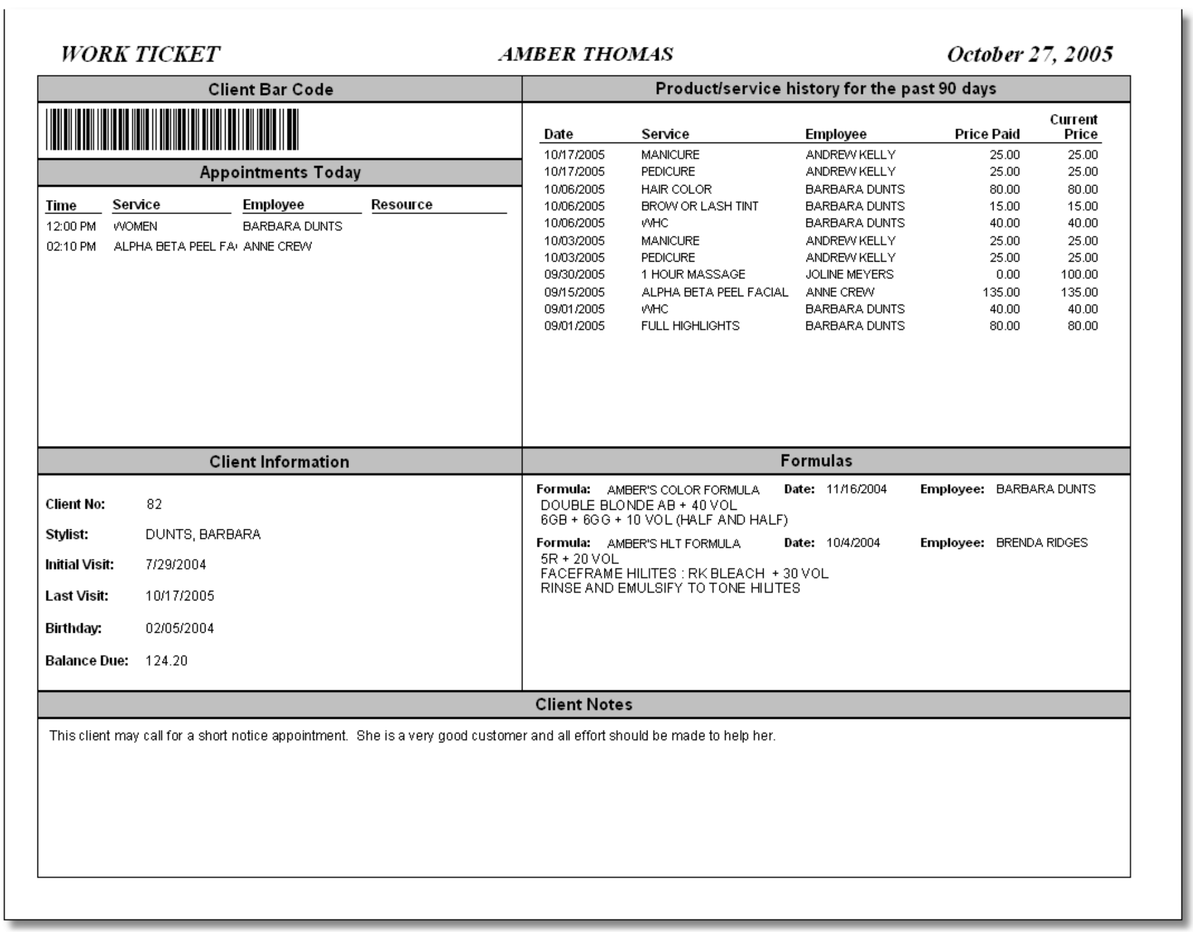
5. Select a specific employee if you would like to print work tickets for only one employee or one employee at a time.

6. You may also select a specific client if you would like to print out work tickets for only one client.

7. Select how many days you would like to show history for.

8. Select your Report Options at the bottom.

9. Click the "Preview" button to view the work tickets or click the "Print" button to print the work tickets.



WORK TICKET *AMBER THOMAS* *October 27, 2005*

Client Bar Code

Appointments Today

Time	Service	Employee	Resource
12:00 PM	WOMEN	BARBARA DUNTS	
02:10 PM	ALPHA BETA PEEL FA	ANNE CREW	

Product/service history for the past 90 days

Date	Service	Employee	Price Paid	Current Price
10/17/2005	MANICURE	ANDREW KELLY	25.00	25.00
10/17/2005	PEDICURE	ANDREW KELLY	25.00	25.00
10/06/2005	HAIR COLOR	BARBARA DUNTS	80.00	80.00
10/06/2005	BROW OR LASH TINT	BARBARA DUNTS	15.00	15.00
10/06/2005	WHC	BARBARA DUNTS	40.00	40.00
10/03/2005	MANICURE	ANDREW KELLY	25.00	25.00
10/03/2005	PEDICURE	ANDREW KELLY	25.00	25.00
09/30/2005	1 HOUR MASSAGE	JOLINE MEYERS	0.00	100.00
09/15/2005	ALPHA BETA PEEL FACIAL	ANNE CREW	135.00	135.00
09/01/2005	WHC	BARBARA DUNTS	40.00	40.00
09/01/2005	FULL HIGHLIGHTS	BARBARA DUNTS	80.00	80.00

Client Information

Client No: 82
Stylist: DUNTS, BARBARA
Initial Visit: 7/29/2004
Last Visit: 10/17/2005
Birthday: 02/05/2004
Balance Due: 124.20

Formulas

Formula: AMBER'S COLOR FORMULA **Date:** 11/16/2004 **Employee:** BARBARA DUNTS
DOUBLE BLONDE AB + 40 VOL
6GB + 6GG + 10 VOL (HALF AND HALF)

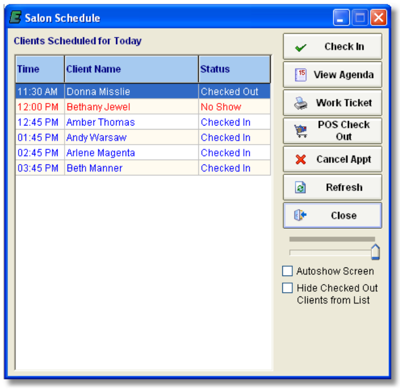
Formula: AMBER'S HLT FORMULA **Date:** 10/4/2004 **Employee:** BRENDA RIDGES
5R + 20 VOL
FACEFRAME HILITES : RK BLEACH + 30 VOL
RINSE AND EMULSIFY TO TONE HILITES

Client Notes

This client may call for a short notice appointment. She is a very good customer and all effort should be made to help her.

Salon Schedule

Note: The Salon Schedule is not available in the Envision Solo or Envision Standard versions.



1. The Salon Schedule List can be used to quickly view the clients that are scheduled to come in for the current date.

The status of the appointment will appear under the status column to the right of the client's ID.

2. Click the "Check In" button if the client has arrived and you would like to check them in.

Click this button to check the selected client (highlighted in the list) in when they have arrived.

3. Click the "View Agenda" button if you would like to view the client's agenda.

This will show information for all the services they have scheduled.

4. Click the "Work Ticket" button if you would like print a work ticket for the selected (highlighted) client in the list.

Click this button to print a work ticket for the selected client. Select your options and click either the print or preview button.

5. Click the "POS Check Out" button if you would like to check the client out and complete their sales transaction in the Point of Sale.

This option will bring all the services that are booked for the selected client on that day into the POS (Point of Sale) window. All you will need to do is add any additional services or retail and click on the "Sale" button to complete the sale.

6. Click the "Cancel Appt" button the client has requested to cancel their appointment.

Click this button to cancel the selected (highlighted) client's appointment.

7. Click the "Refresh" button to refresh this list.

Click this button when more than one user on a network is making appointments to refresh your Salon Schedule to reflect the latest information.

8. Click the "Close" button to close out of this screen.

9. The sliding bar below the "Close" button can be used to make this window transparent.

This bar will allow you to make the Salon Schedule transparent to your preference.

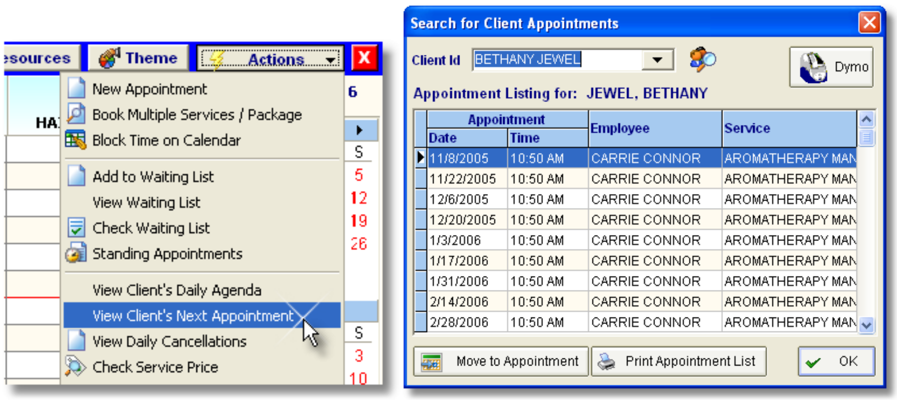
10. Uncheck the "Autoshow Screen" check box if you do not want this window to open every time you open the calendar.

Check this box if you would like the Salon Schedule to open every time you open the Appointment Calendar.

View Client's Next Appointment

The "View Client's Next Appointment" feature allows you to quickly check when a client's future appointments are scheduled.

1. Click the "Actions" button in the upper right hand corner of the calendar.



2. Select the Client that you would like to view an appointment listing for.

The listing of appointments will appear as soon as the client is selected.

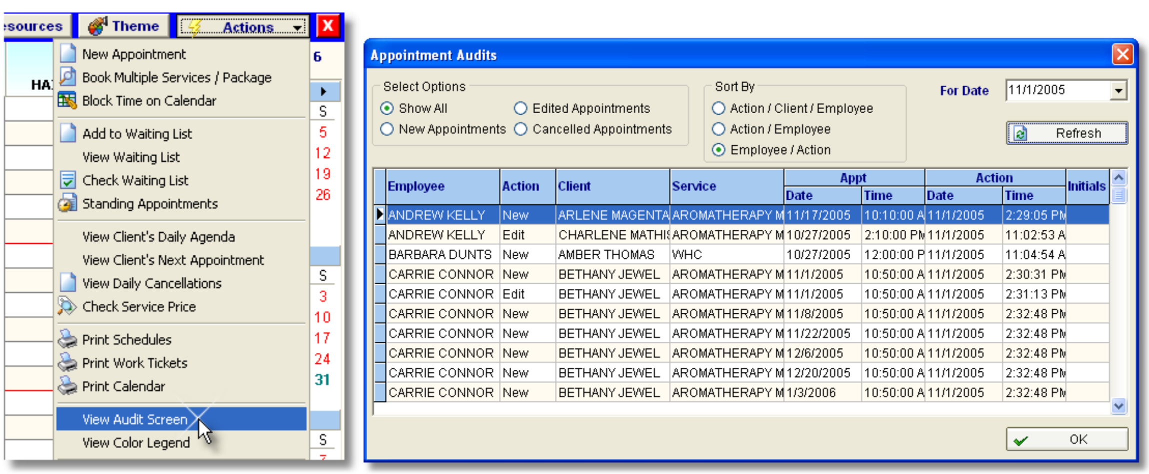
3. Click the "Print Appointment List" button if the client would like a printed list of their appointments.

4. Click the "Move to Appointment" button if you need to move to that appointment in the calendar.

View Audit Screen

The Audit screen will show when appointments were scheduled, edited and canceled.

1. Click the "Actions" button in the upper right hand corner of the calendar.



2. Select whether you would like to view New Appointments, Edited Appointments or Canceled Appointments.

3. Click the "Refresh" button after making your selection.

The list that appears will display information about when appointments were scheduled, edited and canceled. If Initials were entered when the appointment was scheduled, you will be able to determine who scheduled the appointment.

Appointment Calendar Worksheet

Use this worksheet to practice using the Appointment Calendar in the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own appointments in your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

1. Open the Appointment Calendar and schedule the following services for Mary Sommers:

- Client: Mary Sommers
- Retention: Repeat Request
- Appointment Date: Current Date
- Appointment Time: 10:00 AM
- Employee: Nila Larson
- Service: Color

Click the "Book & Continue" button to schedule the second service.

- Client: Mary Sommers
- Retention: Repeat Request
- Appointment Date: Current Date
- Appointment Time: 10:45 AM
- Employee Nila Larson
- Service: Women's Hair Cut

2. Use the "Book Multiple Services" feature to search for available times and select a time to book appointments for the following services:

- Client: Charliz Thompson
- Services: Manicure and Pedicure
- Employee for both services: Lisa Jones
- Start Search From Date: Current Date
- Start Search From Time: 9:00 AM
- Start Search To Time: 6:00 PM
- No. of Days to Search: 7
- Days of the Week: Monday, Wednesday and Friday

3. Add the following Standing Appointment:

- Client: Hana Maris
- From Date: Current Date
- To Date: Last Day of the Year
- Appointment Time: 10:00 AM
- Frequency: 2 Weeks
- Employee: Samantha Jones
- Service: Manicure

4. Use the POS Check Out feature to check out Mary Sommers from the Appointment Calendar.

Notes

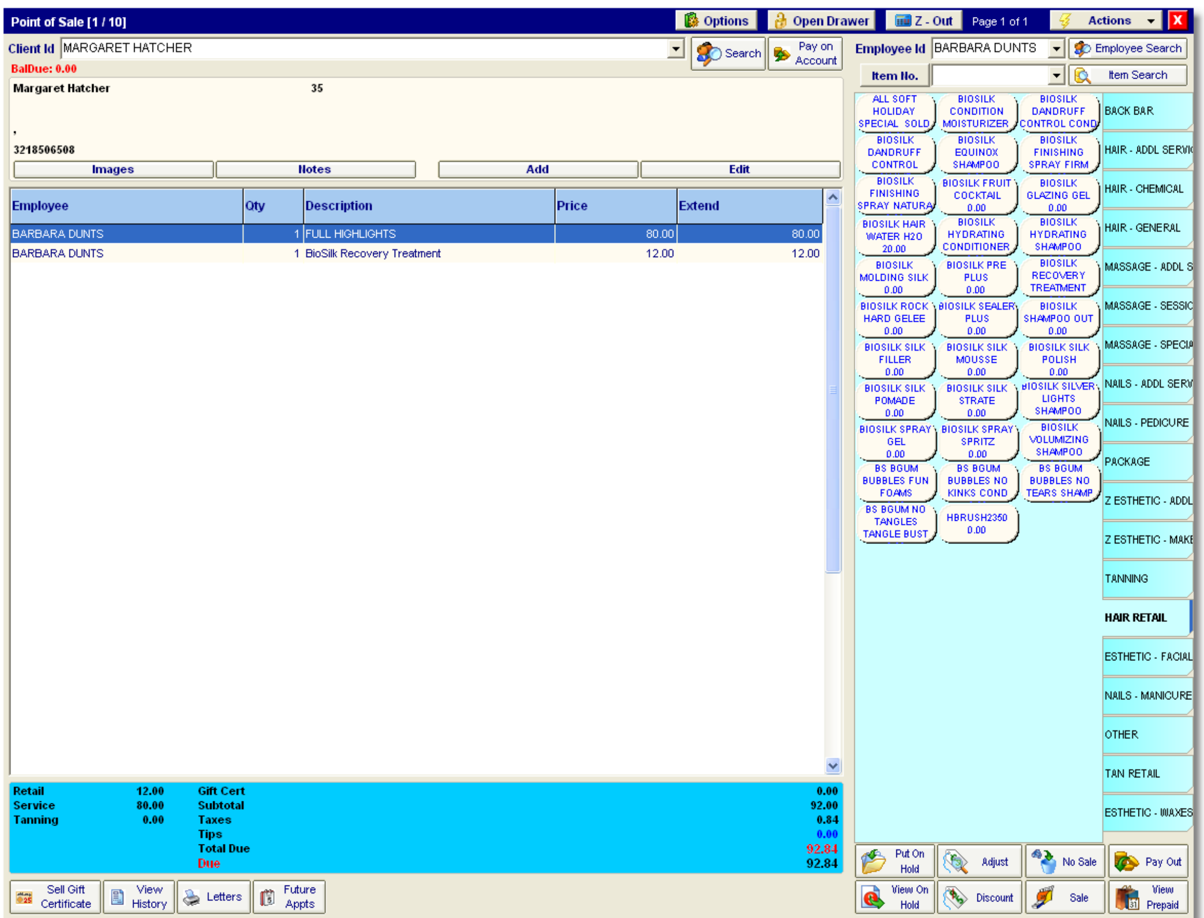
Point of Sale

Point of Sale Overview

This is one of the most used screens of the program. From here you sell every product including Gift Certificates. If you've equipped your station with a cash drawer, display pole, and receipt printer, they will be controlled from this screen.

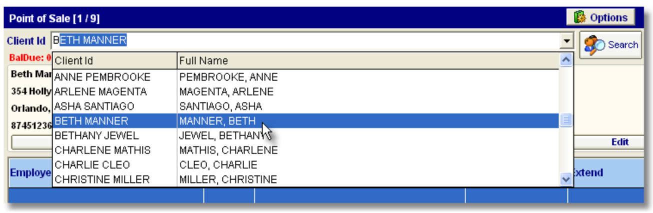
Click on the "POS" button on the Tool Bar as shown in the image below to open the Point of Sale.

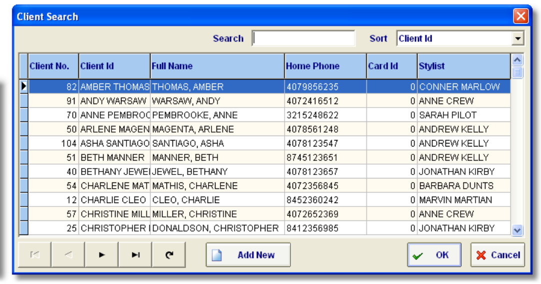
The following image is an example of what the Point of Sale window will look like:



Client Selection

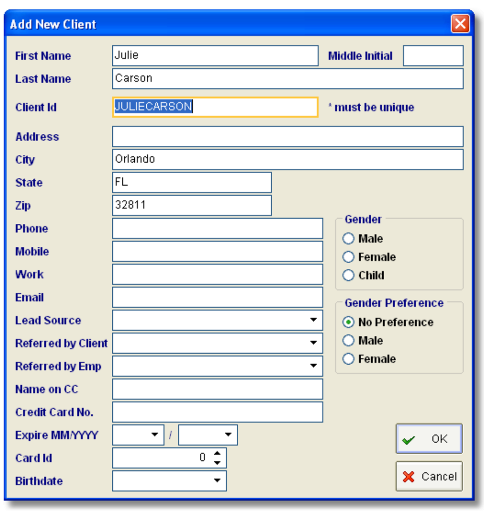
1. Select the client for the sales transaction.





The Client must be selected for the invoice if you are selling any product that is a "Package". You will also need to select a client if you are selling them a "Gift Certificate". You may click the "Search" button and select from a list of your clients, or you may start typing the first characters of the Client ID. As you type each letter, the search will instantly narrow down. When in the "Client Search" window you may click the "Client ID" bar and it will change in alphabetical order of the Client Id's in your list. If you are looking for a client and only know their telephone number, click the Home Phone bar to sort by phone numbers and start typing their number. Each number you type, "Zeros" in on the one you want.

NOTE: Below the drop down list of clients is an "Add" button so you can quickly add a client "On the Fly". The below picture is a screen shot of this Quick Client Add screen.

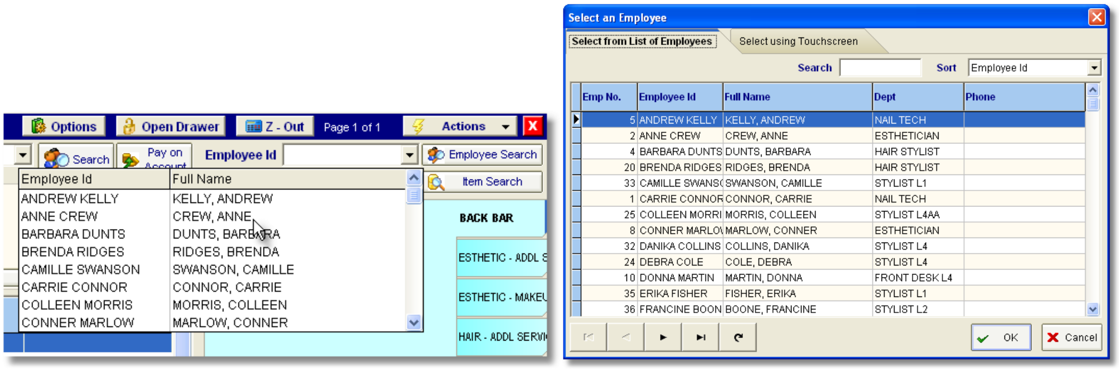


The Client Information Display Area will display the client's address and phone number when the client has been selected.

This area of the screen, located below the Client Id field, will display the Clients Name, Address, and other information, once you have selected a client. You may also click the Add or Edit buttons to add a new client or edit a current client's existing record.

Employee Selection

2. Select the Employee for the sales transaction.

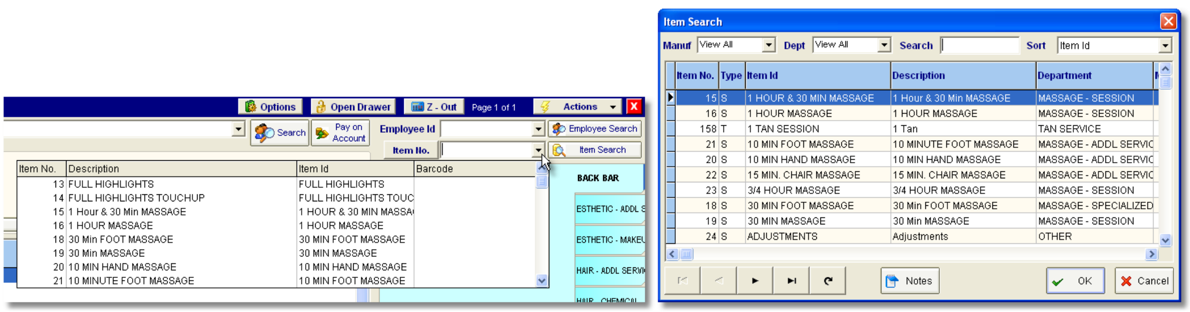


An Employee must be associated with each sale. This might only be the receptionist, but the receptionist must be selected. Since the program is sensitive to commissions, an Employee is required. You may choose to create an "In House Sales" employee for sales when an employee will not be receiving commission.

Click the "Employee Search" button and select the employee from the listing of all the employees you have entered. You may also start typing the first characters of the Employee ID. As you type each letter, the search will instantly narrow down.

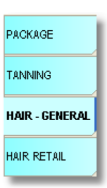
Item Selection

3. Select the item that is being sold to the client.



Click the "Item Search" button and select the product to sell from the listing. If you have chosen "Display Product Buttons" from the Actions menu, you may use those buttons instead. If you are using a barcode scanner, click the "Item ID" button to search for the product by the barcode. Click in the field labeled by the "Barcode" button so that your cursor is blinking and scan the product. If you will always be searching for the product with the barcode scanner, you may set the the Barcode as the defaulted sort selection. This can be done on the Setup Program Preferences screen on the "Options" tab. Set the "Inventory" Default Sort Order to "Barcode".

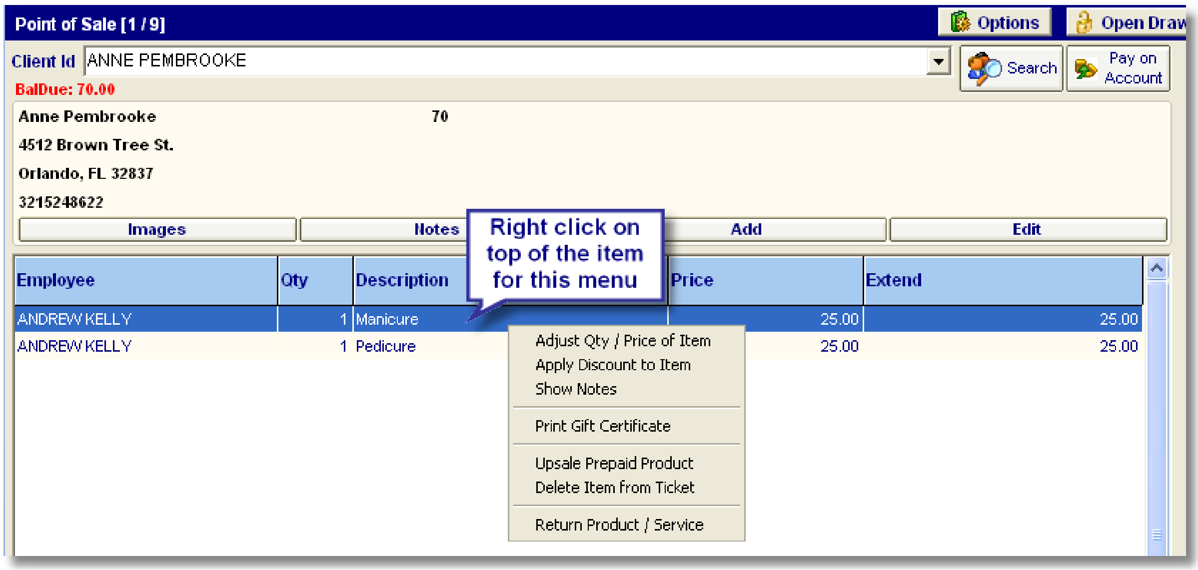
POS Product Buttons



These buttons represent the Departments and Products you have created from the Inventory menu. When you created them, you decided to display them here by checking the "Display on POS" box. Click the Department tab for the product you want and all the products in that Department will have a button displayed.

Invoice Listing

4. Review the Invoice Listing to ensure that the correct product and employee have been selected.



This area of the screen, located below the Client Information Display Area, lists all the products you have chosen for this sale. It also displays the quantity and Employee. To see a more complete listing, uncheck "Display Product Buttons" on the Actions menu.

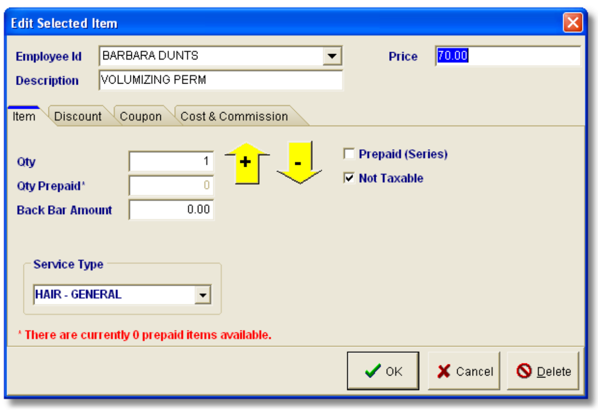
- **Adjust Qty / Price of Item:** Select this option if you would like to adjust the price, apply a discount, edit the employee selection, quantity, or Cost and Commission.
- **Apply Discount to Item:** Select this option if you would like to apply a discount to the selected (highlighted) item.
- **Show Notes:** Select this option if you would like to display the product notes.
- **Print Gift Certificate:** Select this option if you would like to print a gift certificate.
- **Upsale Prepaid Product:**
- **Delete Item from Ticket:** Select this option if you would like to delete the selected item.
- **Return Product / Service:** Select this option if you would like to return the selected product or service.

Point of Sale Features

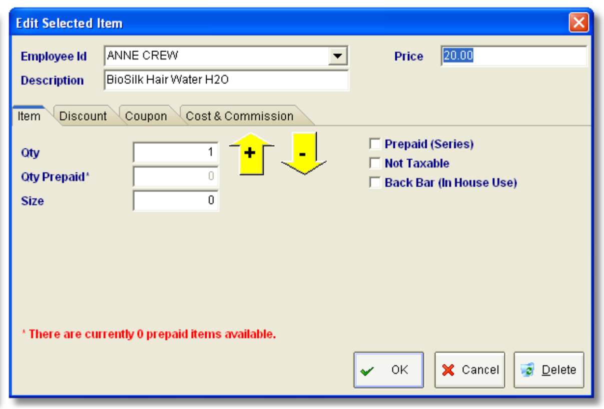
Adjust Button

Item Adjust

This button allows you to adjust any product you have placed on the Invoice. Click the Product you wish to Adjust in the Invoice area to select it (must be highlighted). Then click the Adjust button. You may also double left-click on top of the item to open the window shown below. Make any adjustments you wish or click "Delete" to remove the item from the Invoice.



Adjust - Service Item

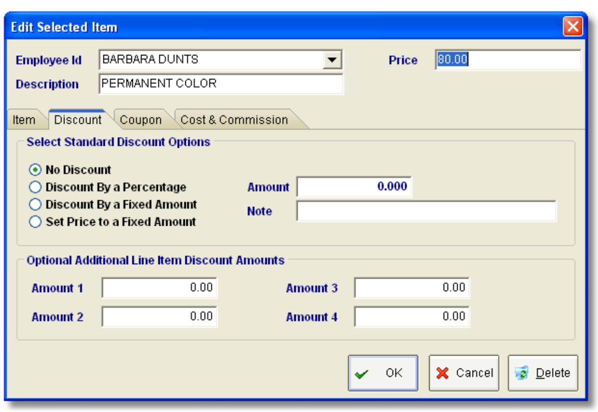


Adjust - Retail Item

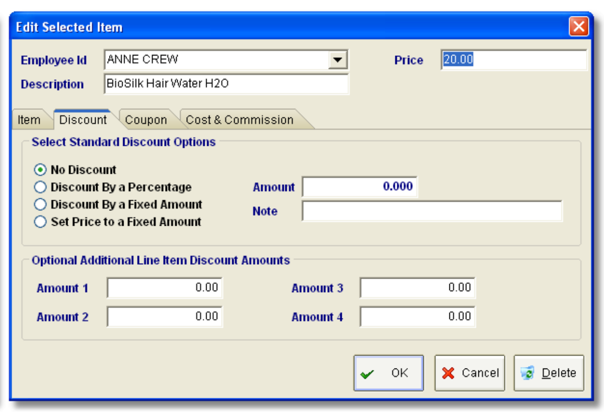
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Discount Tab

Use the Discount tab to apply a discount to the service or retail item.



Discount - Service Item

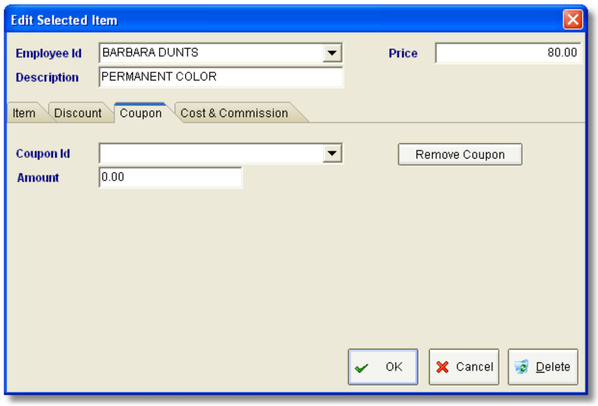


Discount - Retail Item

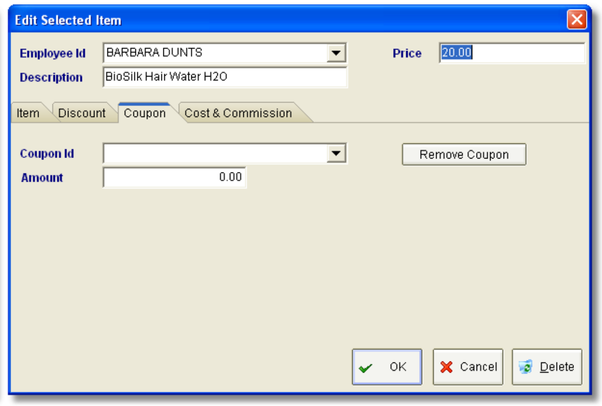
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Coupon Tab

Use this screen to select a coupon to apply to the selected item. Coupons must be added to the Coupon List before you will be able to select one here. The Coupon List can be reached by clicking on "Accounting" on the Menu Bar and selecting "Coupon List" from the drop down menu.



Coupon - Service Item



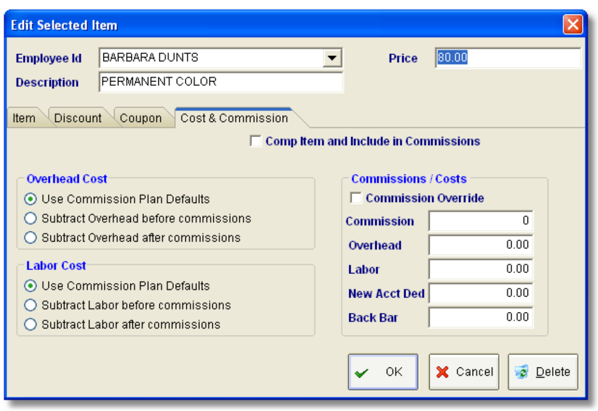
Coupon - Retail Item

Use the "Remove Coupon" button to remove a selected coupon.

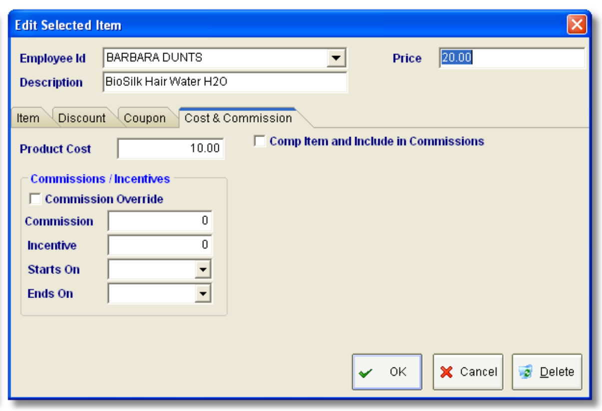
Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Cost & Commission Tab

Use the Cost & Commission tab to edit the Cost and Commission of the selected item.



Cost & Commission - Service Item



Cost & Commission - Retail Item

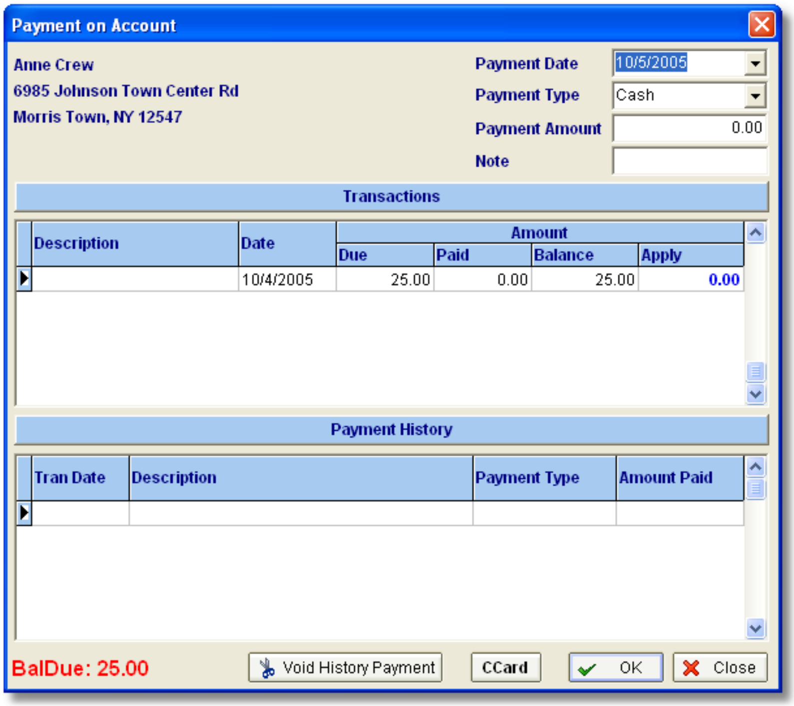
You may edit the Commission Override of a selected item on this screen. The "Comp Item and Include In Commissions" check box will comp the item (changes the price to a zero dollar amount) while still giving the selected employee full commission on the price of the service or retail item.

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Pay On Account Button

Note: The On Account feature is not available in the Envision Solo or Envision Standard versions.

The following screen appears when you click the "Pay On Account" button located on the POS screen. This screen allows you to apply a payment or place credit on a clients account.



Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Sell a Gift Certificate Button

Because Gift Certificates require information about who bought it, and who it is intended for, these sales are handled through the small screen shown below.

1. Select the client that will be using the gift certificate in the "Purchased For" field.

Click the small button in the "Purchased For" field to see a list of your existing clients. If the person to whom the gift is intended is not on your client list, click the "Add New" button on the client list screen and add at least their name and address. This ensures that if the card is lost, the gift can still be redeemed.

Note: Before clicking the "Sell Gift Certificate" button on the POS screen, you must select the client who is purchasing this certificate. If they are new to your shop, take this opportunity to get their name and address and add them to your Client list. Do this the same way as described above for the recipient of the gift.

2. Select the Employee that is selling the Gift Certificate.

This is required for ALL sales, not only Gift Certificates. Click the small button and select the Employee from the list of your employee's. You may select an "Inhouse Sales" employee if you do not keep track of who sells gift certificates.

3. Enter the Amount of the Gift Certificate.

4. Select a "Starts On" and "Expiration Date" for the gift certificate (optional).

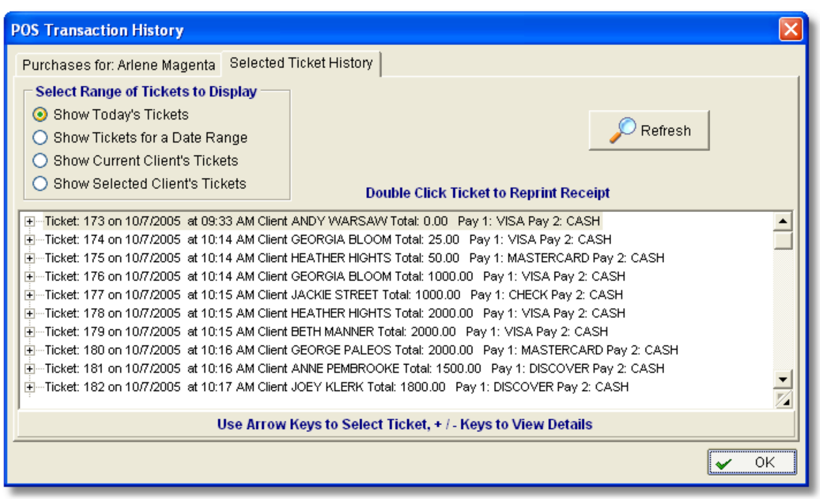
Today's date is entered as the "Starts On" date for the Gift Certificate, but you may change it to any date in the future. Select a date that the Gift Certificate will expire. This encourages the recipient to visit your store.

5. You may swipe a Gift Card in the "Gift Card No." field or you may enter a specific number in this field.

The "Gift Card #" field allows you to enter your own choice of gift certificate numbers. This is useful for pre-printed Gift Certificates with serial numbers. The program will assign it's own "Gift Certificate No." each time a gift certificate is sold.

View History Button

The following screen provides a convenient way to view a history of transactions that have occurred on this POS station.

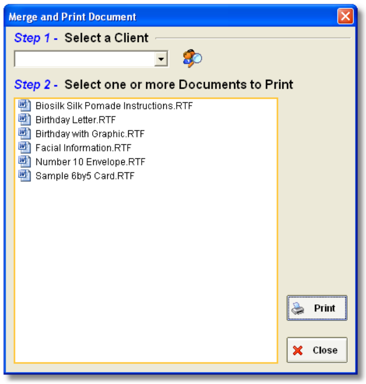


You are able to view the purchases for a selected client or tickets for the current day, a date range, the current client's tickets, or a selected client's tickets. After making your selection in the "Select Range of Tickets to Display" area, click the "Refresh" button to refresh the ticket area below for your selection.

Click the plus sign to the left of the ticket to view more detailed information about that ticket.

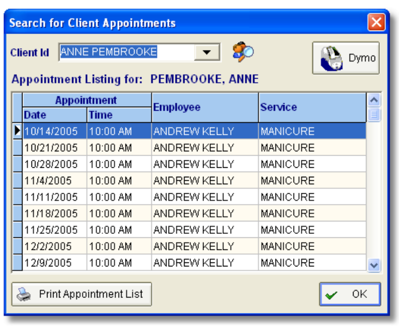
Letter Button

This button is used to merge and print a document to a single client from the Appointment Calendar or POS (Point of Sale) window. Normally, you would use the Word Processor to merge and print a document, however you would need to set a filter for your clients to print to certain clients. This option allows you to print a document to one single client without having to filter out that single client.



Future Appointment Button

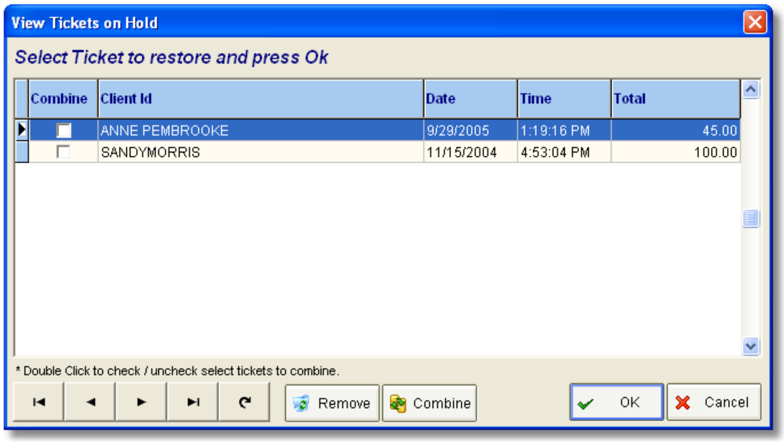
Click this button to view the selected client's future appointments. The following screen will appear with a listing of the selected client's future appointments. This feature is useful for situations when a client may ask when their next appointment is. You may also use your drop down arrow to select a different client.



Put On Hold / View On Hold

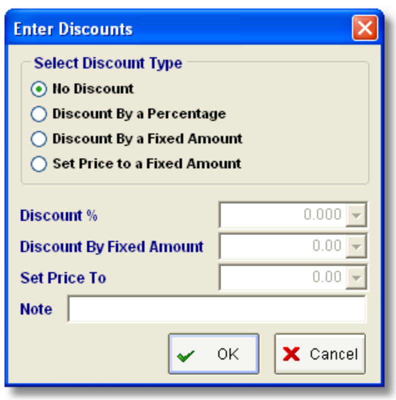
These buttons allow you to store the ticket with the client's name and clear the POS terminal. The next time you bring up this client in the "Client Id" field, you will be reminded of this stored invoice and you can restore it to complete the sale.

You may also use this button to combine tickets. When you place more than one ticket "On Hold", you have the option to select the tickets that you would like to combine. This is useful when you have clients that came together on two separate tickets. This feature will allow you to place both clients' transactions on one ticket. Click the "View On Hold" button to restore a ticket or to combine more than one ticket. To combine tickets, double click each ticket to place a check in the "Combine" box next to the ticket and click the "Combine" button. Click "Ok" when you are asked if you would like to restore the on hold tickets.



Discount Button

The following screen allows you to apply a discount to this sale on the fly. When you select one of the 4 choices at the top of the screen you determine which of the fields at the bottom of the screen is activated. If you select "No Discount" none of the fields work. If you select "Discount By a Percentage" then only the "Discount %" field will allow an entry. Selecting By a Dollar Amount" will activate the "Discount By Fixed Amount" field and disable the other two. The last choice allows you to set the item being sold to a Fixed Amount and enables the last field at the bottom of the screen, "Set Price To". Click the "OK" button when done.



No Sale Button

Click this button to clear the invoice and return to a blank POS screen. You will be asked to confirm this action with the Manager Override Password.

Sale Button

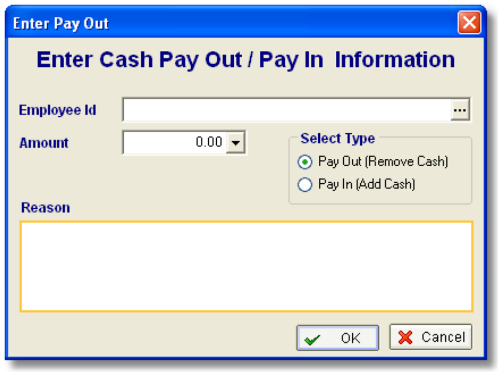
Click this button when you have completed this invoice and are ready to take payment. After clicking this button the screen will change and provide areas for payment.

Pay Out Button

Click this button to make Cash Payouts and Pay Ins from the cash drawer. As shown on the following screen shot, select the employee from the Employee Id field and enter the amount and the reason. It is a good idea to enter the number of the receipt.

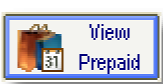
Select the Type, either "Pay Out (Remove Cash)" or "Pay In (Add Cash)".

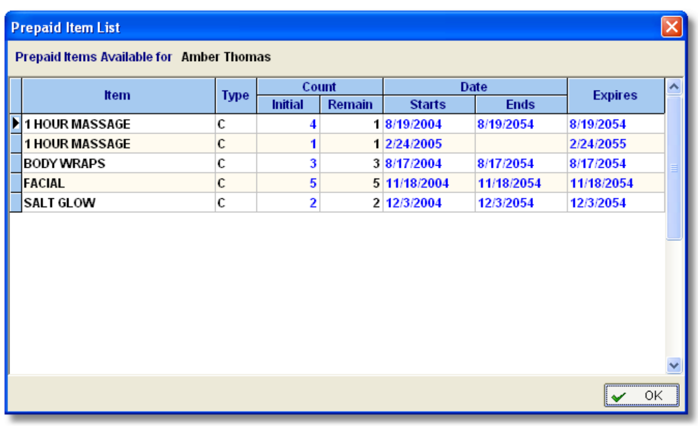
Then click the "OK" button to save or the "Cancel" button to discard.



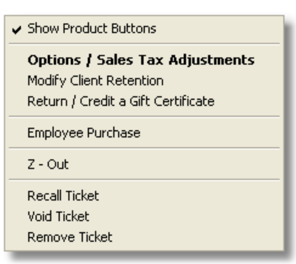
Prepaid Button

Click this button to see what items are prepaid for the client you have selected. If no client is selected, you will be prompted to select one.





Actions Menu



- Select **Show Product Buttons** if you would like the product buttons displayed on the right side of the Point of Sale screen. A check will be displayed next to this option when you click on the Actions button. Select this option again if you do not want the product buttons displayed. The check will be removed and the detailed invoice screen will appear.

- Select **"Options / Sales Tax Adjustments"** to open a screen with Point of Sale options and Sales Tax Adjustments.
- The **"Modify Client Retention"** option will open the **"Manage Client Retention"** screen.
- The **"Return / Credit a Gift Certificate"** option can be used to return a gift certificate.
- The **"Employee Purchase"** option can be used to apply employee prices to the ticket.
- The **"Z-Out"** option is used to open the Z-Out window.
- Select **"Recall Ticket"** to edit a ticket. You will be prompted for the Manager Override Password.
- Select **"Void Ticket"** to cancel a ticket. The amount will be changed to a negative amount and the ticket will remain in your ticket history.
- Select **"Remove Ticket"** to remove a ticket from your ticket history.

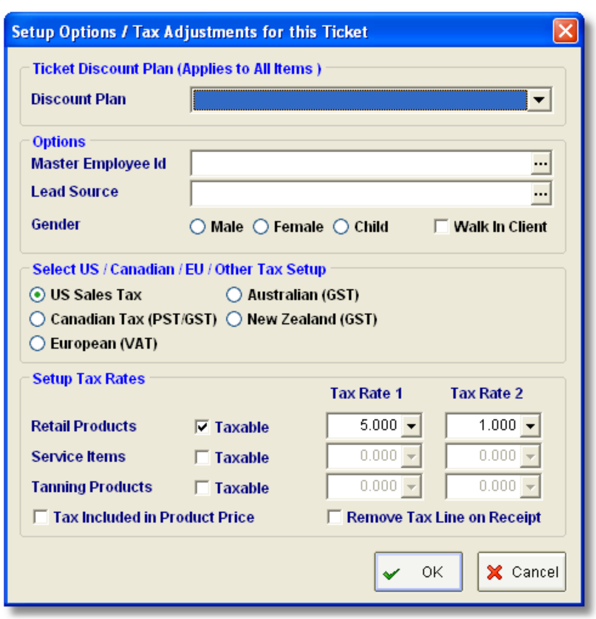
Open Drawer Button

Clicking this button will open the cash drawer if your cash drawer is connected to a receipt printer or if it is connected to your computer.

Note: Manager Override Password required. Set the password using "Setup Program Preferences" from the "Company" menu.

Options Button

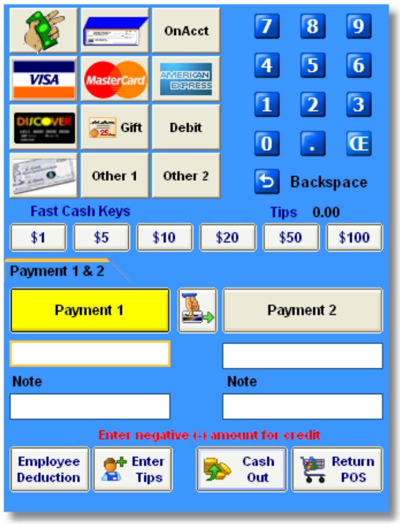
You may use this screen to apply a Discount Plan to the transaction, set the Master Employee Id, Lead Source, Gender, tax options, and you may also check the "Walk In Client" check box if the client is a Walk In Client. It is not necessary to select a Client in the "Client Id" field if the client is a Walk In unless they are purchasing Packages, Prepaid Items or Gift Certificates.



Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Payment

After you have completed the invoice, and you click the "Sale" button, the POS screen reconfigures itself as shown on the following image.



Method of Payment Buttons

Click one of these buttons to select the method of payment for either payment key you have selected (Payment 1 or Payment 2). The screen will reconfigure slightly depending upon which method you select. For example, if you select any Credit Card a small field will be available for you to enter the "Approval Code" or "Authorization No.". But, if you select Check, another field will be available for you to enter the Check number.

POS Keypad

Click these keys just as you would a calculator's. As you click the numeric keys the amount will be entered into either the Payment 1 or Payment 2 field, depending upon which one you have selected.

Fast Cash Keys

If the Client is paying cash and hands you a specific bill, just click the key matching the denomination of the bill and the sale is complete. The amount of change owed will display for 30 seconds.

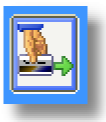
Tips / Change Amount

The amount you have entered using the "Tips" button will be displayed here. The amount due back to the client will be displayed in the "Change" area.

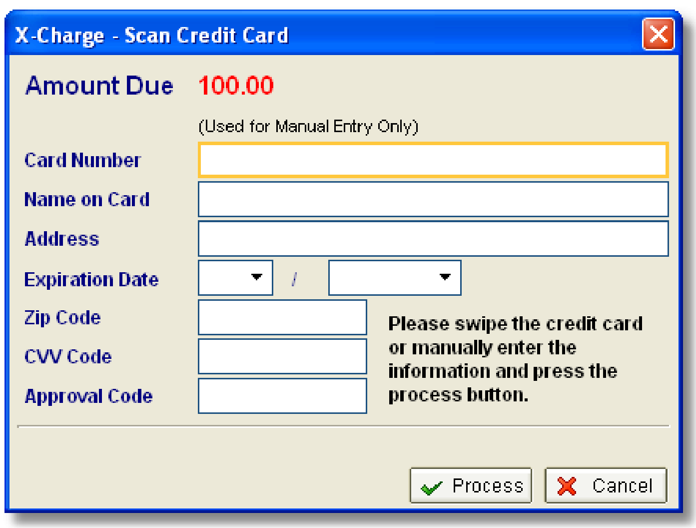
Payments

The program has the ability to split a payment between two methods. Click either Payment 1 or Payment 2 and select the first type of payment. Enter the amount that the client will be paying with the first payment type and then click the second payment button and select the second payment type. Enter the amount that the client will be paying with the second payment type. When you select any payment type other than "Cash" the amount due will automatically be filled into the Payment Type fields.

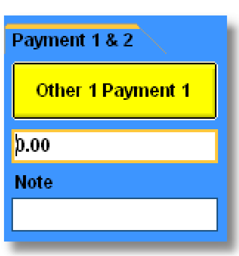
Credit Card Button



This button will only be available if you have purchased the Credit Card Processing feature of this program. This feature allows you to process credit card transactions through a program on your computer. The program is compatible with a program called X-charge. X-charge authorizes and performs electronic draft capture for all major credit cards. The image shown below is the window that will pop up when you click on the credit card button. You may swipe the card for processing as soon as this window opens or you may manually enter the credit card information and then click the "Process" button. When the card has been processed and approved the Authorization No. will be entered into the field available on the Payment Screen.



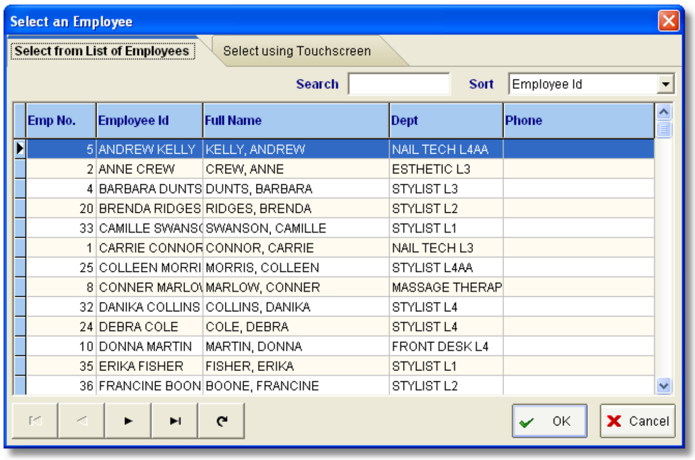
POS Note



You may enter a small note in this area. It will be stored with the transaction.

Employee Deduction

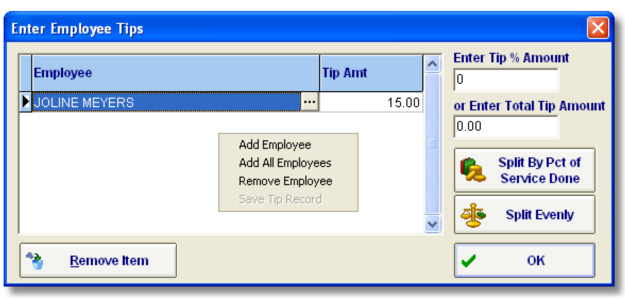
Envision has the ability to automatically apply purchases made by employees to be deducted from their payroll. When you click this button you will see the screen below. Select the employee making the purchase and then click the "OK" button. Use the scroll bar on the right to scroll through the list if it is large. You may also use the Search and Sort fields at the top of the screen to locate an employee. Click the "Select using Touchscreen" tab to format this window for Touchscreen monitors.



Employee Tips

This screen is where you select an employee and enter the amount of the tip. You can have the tip split between multiple employees at the client's direction. The total amount you enter here will show on the POS under the numeric keypad in the area shown as "Tips".

The following screen will appear when you click on the "Enter Tips" button from the Payment Screen.



1. Select the Employee.

Click the small button in the employee name field and you will see the Employee Search screen, which is a listing of all your employee's. Select an employee to receive a tip. The program will automatically highlight the employee that performed the first service on the invoice. You need to select more than one employee, right click on top on the Employee column. The above options will appear in the Enter Tips window for you to Add and Employee, Add All Employees, or Remove an Employee.

2. Enter the tip amount in the "Tip Amt" field.

Enter the amount of the tip in the "Tip Amount" field. If there are multiple employees, you may enter a specific amount for each employee in the "Tip Amt" field to right of their Employee Id, or you may enter a "Total Tip Amount" in the field on the right. The "Total Tip Amount" is the total amount that the client gives to you for more than one employee. You may also enter a "Tip % Amount". If you are entering tips for only one employee or if you are entering a specific amount for each employee, click the "OK" button after entering the tip amount.

3. If a "Total Tip Amount" has been entered on the right, select whether the tip will be split by the percent of service done or if it will be split evenly.

Click either "Split By Pct of Service Done" or "Split Evenly". "Split By Pct of Service Done" will split the tip according to the percent of service that was done by each employee. The employee that performed a more expensive, time consuming or difficult service (depending on the price of the service) will receive the larger tip. "Split Evenly" will split the total tip amount evenly for each employee.

4. Click the "OK" button when finished.

The Total Tip amount will automatically be added to the Payment Type that is highlighted.

Cash Out Button

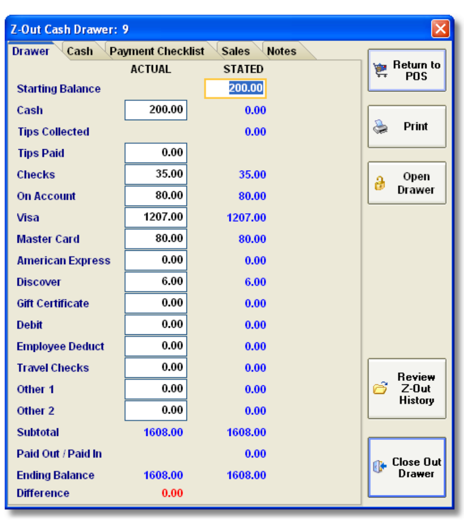
Click this button to complete the sales transaction. If you have Point of Sale hardware installed on you computer and configured in the program, the cash drawer will immediately open and a receipt will be printed.

Return to POS Button

Click this button if you need to make changes to the invoice. This will remove the Payment Screen and show either the full invoice screen or the invoice screen with the Product Departments and buttons.

Z -Out

Z-Out is the standard term used for "Zero Out" of a cash register. This process is performed at least at the end of each business day. There are 4 screens provided by the program to perform this function. Starting with the screen shown below, you will count the various items in your cash drawer and enter the amounts in the indicated spaces below under the "Actual" column. Discrepancies will become obvious. Click the tabs at the top of the screen shot to move to help about the other Z-Out screens.



Z-Out Drawer Totals

Drawer Starting Balance

This amount is inserted automatically based upon what amount you entered during setup. It is normally a fixed amount that is placed in the cash drawer at the start of each business day. You can manually enter any amount you wish.

Z-Out Payment Methods

The fields **"Cash"** through **"Employee Deduct"** show the various methods of payment. Coupons that have been redeemed are a method of payment as is Employee Deduct which is an item sold to an employee that they would like deducted from their payroll. Pressing the "Employee Deduct" button on the POS Payment screen does this. "Tips Collected" is the amount of tips entered into the program for the selected drawer.

Z-Out Subtotal

This number is the total of all money taken into the business through the Point of Sale (POS) screen.

Z-Out Paid Out / In

The amount of cash taken out or put in the cash drawer during the day to make various payments (for examples to vendors) is to be entered here.

Z-Out Difference

The number displayed here is the purpose of Zeroing out the cash drawer. Any discrepancies will be shown in one of the totals above. If all the amounts that you entered are the same as the program is displaying (in the right hand column) there has either been money taken out or put in the drawer without entering it through POS, or documentation has been misplaced (such as a lost Vendor Receipt, or Credit Card statement).

Z-Out Buttons

Click the **"Z-Out and Start New Drawer"** button ONLY when you have made all your entries and printed the information. This button resets the draw to its "Zero" state. You will not be able to make changes to the information you have entered in the Actual fields after clicking this button.

Click the **"Return to POS"** button to close the Cash Drawer and discard all changes you have made. This cancels any entries you have made and closes the "Z-Out" screen.

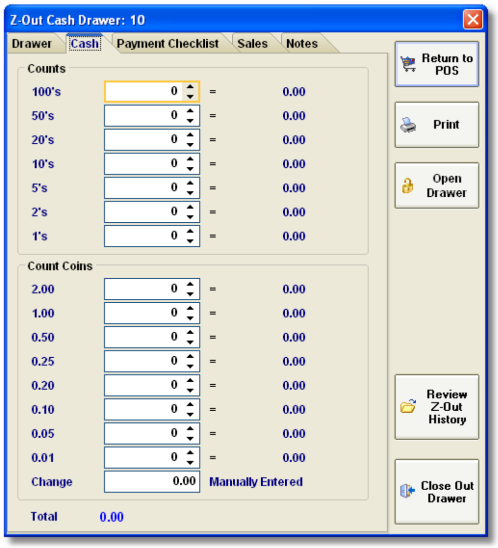
Click the **"Print"** button to get a hard copy of these screens.

Click the **"Open Drawer"** button to open the cash drawer.

Note: Password required, set password using "Setup Program Preferences" from the "Company" menu. The Manager Override Password is located under the "Options" tab.

Z-Out Cash Tab

This screen is designed to allow you to do a count of bills method of cash counting, the same method used by banks and others that handle cash on a daily basis. Just enter the count of the various denomination bills and coins in their spaces and the program will total the amount.

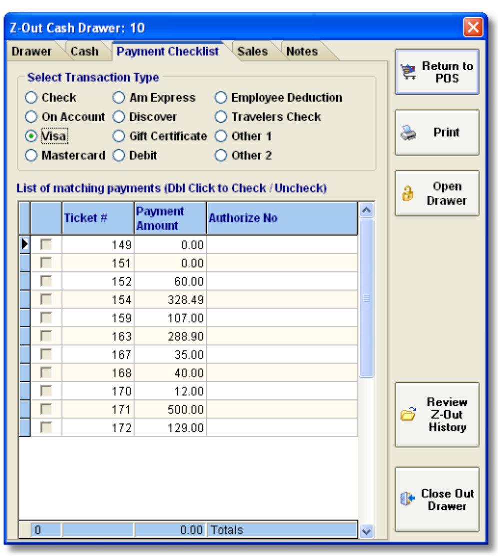


Z-Out Cash / Coin Counter

This screen helps you to professionally count the cash and coins in the drawer. Enter the number of each denomination bill and coin in the spaces provided and the program will total the amount for you. As you enter bill and coin counts on this screen, they are automatically entered as the "Cash" line on the "Drawer Totals" screen.

Z-Out Payment Checklist Tab

This screen will allow you to check all of your receipts for the different payment types. Select a type of payment and double click each ticket to place a check in the box to the left of the "ticket #" field. This will automatically place an amount in the "Actual" payment fields under the Drawer tab. This feature makes it easier for you to make sure your receipts match what the program has recorded.



Transaction Type

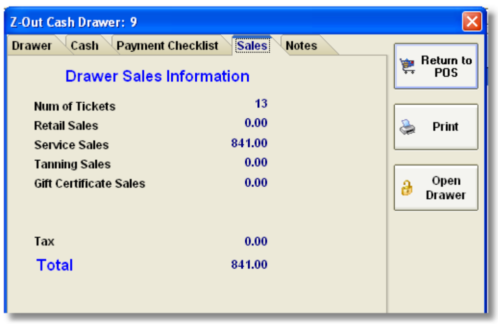
Select the type of payment to populate a list of transactions that used the selected payment type.

Transaction Checklist

Check each ticket that you have matching receipts for. For each ticket that you check off, the amount of the ticket will be added to the total of the "Actual" amount for the selected payment type. This total is displayed at the bottom of this checklist. This amount is automatically entered in the "Actual" field for the selected payment type under the "Drawer" tab. For example, if you need to check your Visa receipts, select the Visa payment type and a list of all Visa transactions will show up in this list. Double click each transaction that you have a matching receipt for to place a check next to the transaction. The amount of the transaction will be added to the Total at the bottom of the checklist. If you click the "Drawer" tab, this amount will also be added to the "Actual" field provided for the Visa payment type.

Z-Out Sales Tab

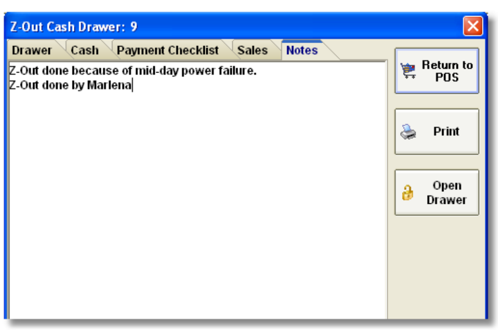
The following screen is for display only. It shows all the categories of sales with the amount of each that was sold. This is an accurate accounting of the strength of your business activity for the day.



Z-Out Sales breakdown

This screen is for display only. It shows the breakdown into the different types of sales you have entered during the day on the Point Of Sale (POS) screen. This information is very valuable for planning and measuring your business decisions. For example, did last weekends newspaper advertisement for a discounted Wash, Cut, and Blow Dry, increase the "Service Sales" enough to warrant it's $500 cost?

Z-Out Notes Tab



This screen is provided for you to enter any notes you feel are necessary. Most businesses want to know who did the "Z-Out". Also, if a "Zeroing" of the cash drawer was done at other than the end of business that day, the reason why should be entered here.

Also, if a "Difference" of other than $0.00 is displayed on the Drawer Totals cannot be discovered, what was done to find the discrepancy should be noted here.

Point of Sale Worksheet

Use this worksheet to practice using the Point of Sale in the Demo Data of Envision. Once you are comfortable with the screens and the information you need to enter, you may enter your own sales transactions in your Live Data.

Switch to the Demo Mode to complete this worksheet. You can switch to the Demo Mode by clicking on "File" on Menu Bar and selecting "Use Demo Data" from the drop down menu. Remember to switch back to your Live Data when you are done.

1. Open the Point of Sale and Check Out the following clients for the following items:

- Client: Lisa Grayson
- Products: Brush
- Services: Color and Women's Haircut
- Payment Type: Visa
- Tips: $15.00

- Client: Joyce Meyers
- Products: Conditioner
- Services: Manicure
- Payment Type: Check
- Tips: $5.00

2. Apply Discounts to the following sales transcations:

- Client: Hana Maris
- Products: Brush
- Discount: 10%

- Client: Sarah Perez
- Services: Women's Haircut
- Discount: $5

3. Sell the following Gift Certificate:

- Purchased by Client: Mary Sommers
- Purchased for Client: Sally Crutchfield
- Sold by Employee: InHouse Employee
- Amount: $100
- Gift Card No.: 5236548

4. Use the "Pay Out" feature for the following items:

- Employee Id: INHOUSE
- Amount: $20
- Type: Pay Out (Remove Cash)
- Reason: Lunch

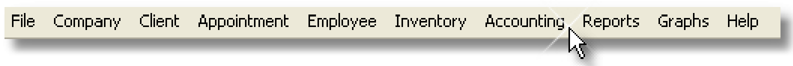
- Employee Id: LJONES
- Amount: $50
- Type: Pay Out (Remove Cash)
- Reason: Supplies

Notes

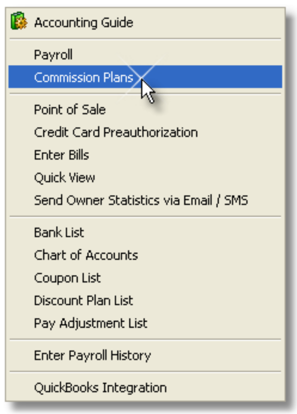
Accounting

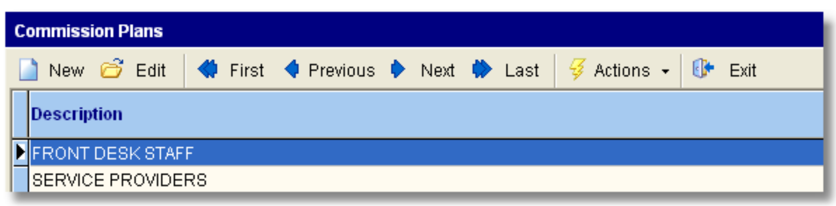
Commission Plans

1. Click on "Accounting" in the Menu Bar at the top of the screen.



2. Select "Commission Plans" from the drop down menu.



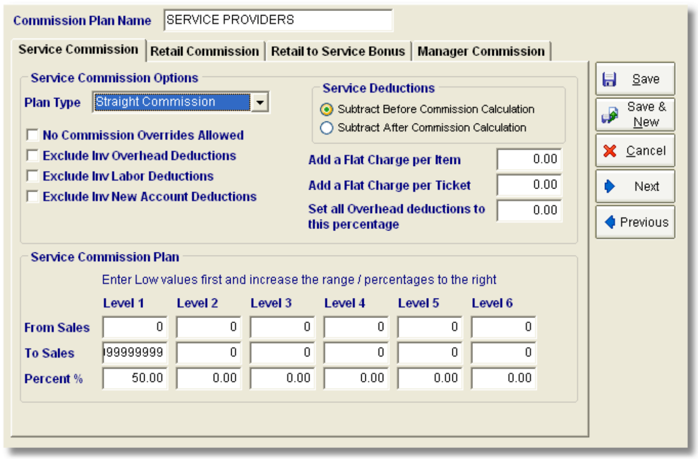


A list of Commission Plans will appear. This list may be empty if you have not created any Commission Plans yet

3. Click the "New" button to add a new Commission Plan to the list or click the "Edit" button to edit a Commission Plan.

Service Tab

The following screen is for Service Commission plans.



Commission Plan Name

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.

Commission Plan Type

There are two choices and they both use the Levels that you setup below. How these levels are used is explained below:

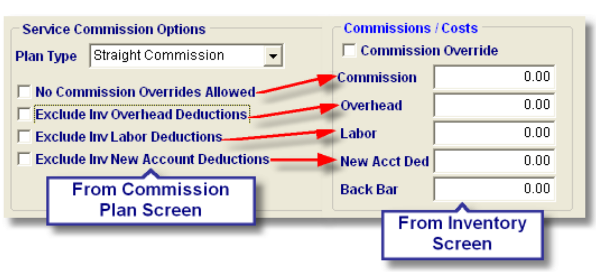
Straight Commission: This method takes the total sales for this employee (Retail or Service only, depending upon which screen your are setting up) and locates the amount on one of the 6 Levels below. The Percent for that Level is then multiplied by the total sales amount.

Sliding Scale Commission: This method of calculating the commission distributes the total sales money for the employee across the levels that apply to it. It results in a lower commission.

KRS Level Commission: If you have purchased the KRS Enhancements with the program, there is a third Plan Type available. This plan type is a default setting for KRS Level System Reporting and will already be selected when you create a new commission plan. Enter the KRS commission percentages for each level in the fields provided.

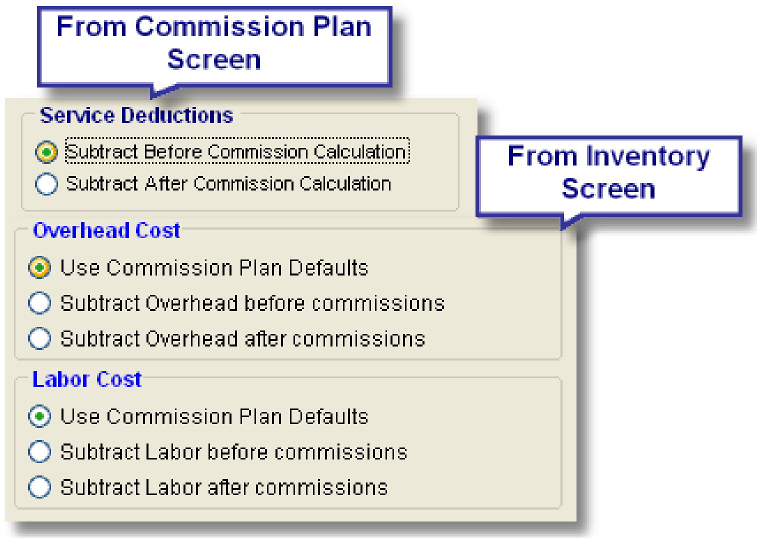
Service Plan Overrides

The 4 checkboxes shown here allow you to turn off the overrides you might have placed on a Service item in inventory. As you can see from the below pictures, when you enter a Service item into inventory (such as a Perm) you can set overrides to reduce the amount of commission an employee receives for performing that service. On this screen you can turn off those settings for this commission plan. If you do check these boxes and turn off the Inventory settings, any employee assigned this commission plan would NOT have their commission money reduced.



Commission Deductions

If there are any costs associated with an inventory item 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"). When you are setting up your commission plans, using these check boxes, you can override whatever was set in Inventory for an item. Then when you assign this commission plan to an Employee, these settings will take precedence over any settings in Inventory. This picture shows these fields with the associated Inventory fields that these will override.



Deductions

Flat Charge Per Item: Placing a dollar amount in this field will instruct the program to deduct that amount from each item the employee sold. Depending upon the choice you made in "Service Deductions" above, the amount will be subtracted Before or After the commission calculation for each item is made.
Flat Charge Per Ticket: Placing a dollar amount in this field will instruct the program to deduct that amount from each ticket that the employee sold.
Set All Overhead Deductions to This Percentage: This field allows you to enter an overhead deductions percentage.

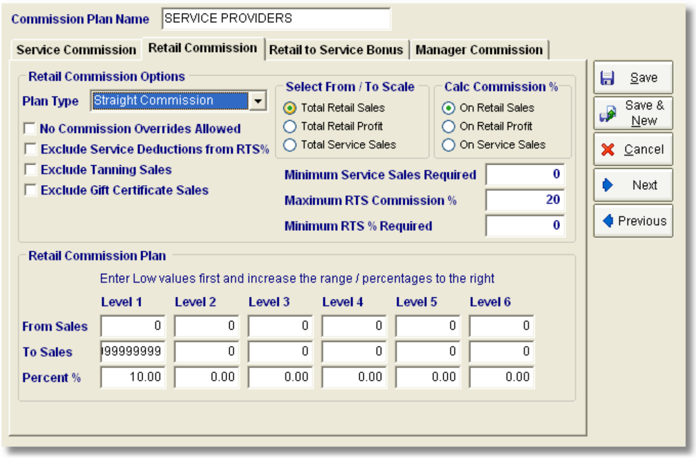
Commission Plan Levels

There are 6 levels provided. As shown in the sample screen shot, you would use these levels to pay an increasing percentage commission to an employee, determined by the amount of sales. How the program uses this table is determined by the "Plan Type" you selected above.

Note: If you don't want to use the levels, place in Level 1 a zero or starting amount for commission in the "From Sales" field, an extremely high amount in the "To Sales" field and set the standard percentage you pay. For example if you pay a 7% commission on all sales above $250, place $250 in Level 1's "From Sales" field, $100,000 in the "To Sales" field and 7 in the "Percent %" field.

Retail Tab

Below is shown the Retail Commissions Plan screen. It functions nearly the same as the Service Commission Plan screen except that some items that apply only to Service have been removed.



Commission Plan Type

There are two choices and they both use the Levels that you setup below. How they use these levels is explained below:

Straight Commission: This method takes the total sales for this employee (Retail or Service only, depending upon which screen your are setting up) and locates the amount on one of the 6 Levels below. The Percent for that Level is then multiplied by the total sales amount.

Sliding Scale Commission: This method of calculating the commission distributes the total sales money for the employee across the levels that apply to it. It results in a lower commission.

Retail to Service %: When the program is enabled with KRS 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.

Excluded Sales

Check any items you would like to pay NO commissions on.

No Commission Overrides Allowed

Check this box and whatever was set in Inventory for a product as a commission override (reducing the commission paid to an employee) will have no effect on any employee assigned this Commission program. This will effectively increase the amount paid on commission.

Payroll Select From To Scale / Calc Commission %

These radio buttons work in conjunction with the "From Sales", "To Sales", and "Percent %" table at the bottom of the screen.

Total Retail Sales / Total Service Sales: These buttons determine whether the Level (1 to 6) is determined by the Retail or Service sales. Some shops want to pay a commission based upon the Service sales an employee makes. The commission percent is still multiplied against the retail sales of that employee, but if you check "Total Service Sales" the level is determined by the Service sales they've made.

For example: An employee sold $800 worth of Retail products and $2,000 worth of Service products. Assume you have Level 1 set for $500 - $1000 with a 1% commission and Level 2 set for $1000 - $2000 with a 2%

commission. If you checked "Total Retail Sales" the commission would be 1% times $800 or $8.00. If you checked "Total Service Sales" the commission would be 2% times $800 or $16.00.   Notice that the commission percent is still multiplied against the Retail sales amount but the level (and therefore the %) is determined by which button you click.
Calc Commission %: When the commission level is determined, this choice will determine whether it is multiplied against the Gross "Retail Sales" (Total) or the Retail Profit only.

Minimum and Maximum Sales and Percentages Required

Minimum Service Sales: If you want any employee assigned this plan to sell a certain amount of Service items before they can earn commissions on Retail sales, enter the amount here.
Maximum RTS Commission %: Enter a Maximum Retail to Sales Commission % if required.
Minimum RTS % Required: Enter a Minimum Retail to Sales % if required.

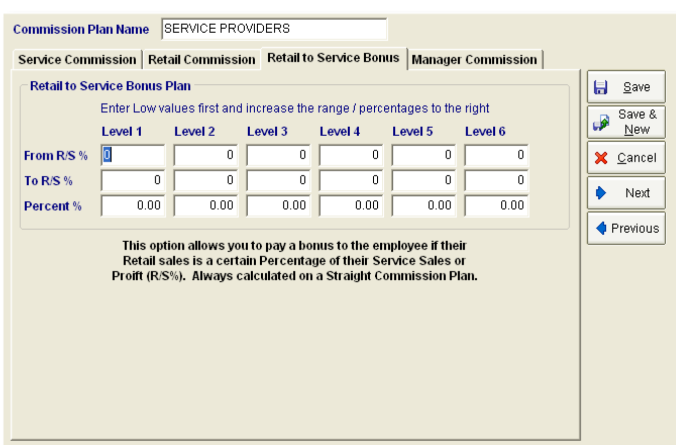
Commission Plan Levels

There are 6 levels provided. As shown in the sample screen shot, you would use these levels to pay an increasing percentage commission to an employee, determined by the amount of sales. How the program uses this table is determined by the "Plan Type" you selected above.

NOTE: If you don't want to use the levels, place in Level 1 a zero or starting amount for commission in the "From Sales" field, an extremely high amount in the "To Sales" field and set the standard percentage you pay. For example if you pay a 7% commission on all sales above $250, place $250 in Level 1's "From Sales" field, $100,000 in the "To Sales" field and 7 in the "Percent %" field.

Retail to Service Bonus Tab

Below is shown the Retail to Service Bonus Commission plan screen. The purpose of this screen is to provide a bonus to Service employees (Hair Stylists, Manicurists, etc.) who sell large amounts of Retail products. The values you enter here will be used to calculate a Bonus, which is in ADDITION to the commission they receive for selling Retail products. It works by setting a ratio of Retail Sales to the Service sales they make. For example, if your hair stylists normally sell $100 worth of Retail products (which usually have a higher profit margin for you, which is the reason for this screen) and this is usually about 3% of the styling services they sell, you might wish to create an incentive for them to sell more Retail by setting up a sliding scale of ratios. Maybe you would set Level 1 to pay an extra 2.5% Bonus if their Retail sales are between 5% and 7% of their service sales. And Level 2 might pay them 4% if their Retail sales are between 8% and 10% of their Service sales.

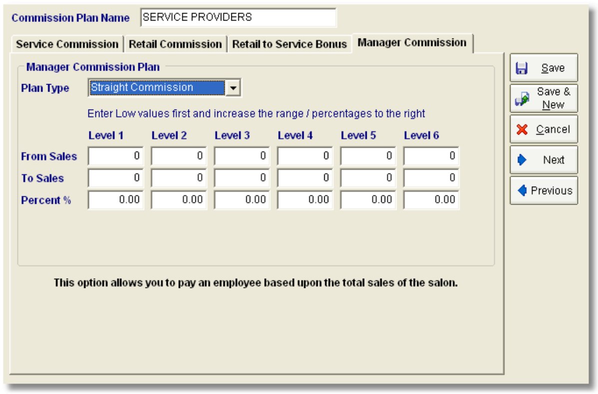


Retail to Service Percent Table

This table should be filled in from the lowest (Left) to highest (Right) percent that you will give as a Bonus for certain ranges of Retail Sales to Service Sales. The "From R/S %" and "To R/S %" set the range for each Level. For example, if I want to give a 1% Bonus for an employee that has Retail sales between 5 and 10 percent of their Service sales, I would enter "5" in Level 1's "From R/S %" and "10" into Level 1's "To R/S %" fields. Then I would enter "1" into the Level 1 "Percent %" field.

Manager Commission Tab

This screen allows you to setup a commission plan to pay an employee based upon the total sales of the salon.



Commission Plan Type

There are two choices and they both use the Levels that you setup below. How they use these levels is explained below:

Straight Commission: This method takes the total sales for this employee (Retail or Service only, depending upon which screen your are setting up) and locates the amount on one of the 6 Levels below. The Percent for that Level is then multiplied by the total sales amount.

Sliding Scale Commission: This method of calculating the commission distributes the total sales money for the employee across the levels that apply to it. It results in a lower commission.

Commission Plan Levels

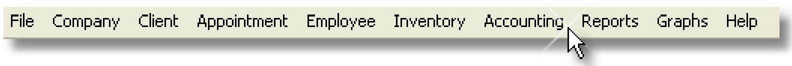
There are 6 levels provided. As shown in the sample screen shot, you would use these levels to pay an increasing percentage commission to an employee, determined by the amount of sales. How the program uses this table is determined by the "Plan Type" you selected above.

NOTE: If you don't want to use the levels, place in Level 1 a zero or starting amount for commission in the "From Sales" field, an extremely high amount in the "To Sales" field and set the standard percentage you pay. For example if you pay a 7% commission on all sales above $250, place $250 in Level 1's "From Sales" field, $100,000 in the "To Sales" field and 7 in the "Percent %" field.

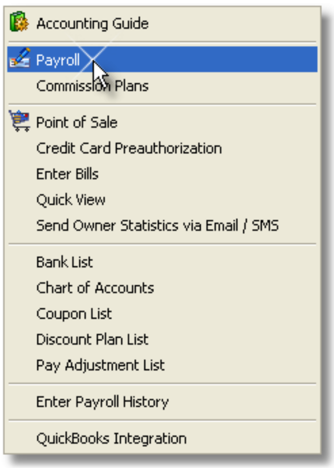
Payroll

Start a New Payroll

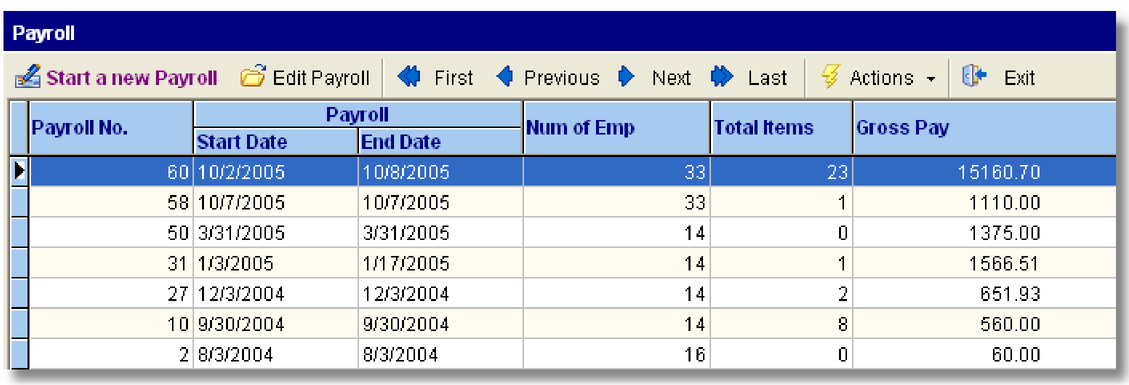
1. **Click on "Accounting" on the Menu Bar.**



2. **Select "Payroll" from the drop down menu.**



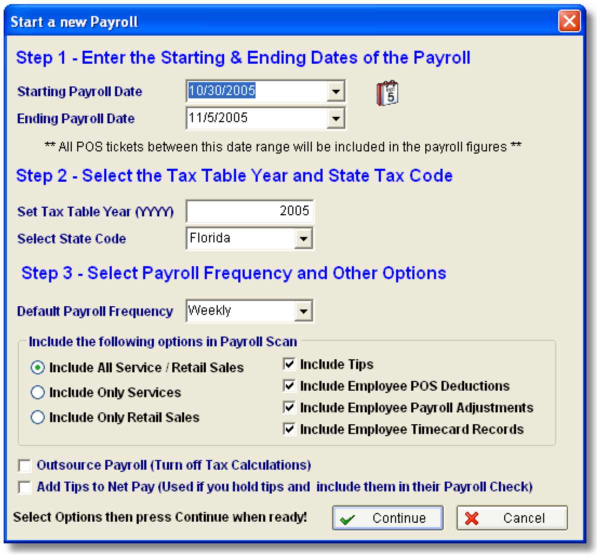
The following screen will appear:



Payroll No.	Payroll Start Date	Payroll End Date	Num of Emp	Total Items	Gross Pay
60	10/2/2005	10/8/2005	33	23	15160.70
58	10/7/2005	10/7/2005	33	1	1110.00
50	3/31/2005	3/31/2005	14	0	1375.00
31	1/3/2005	1/17/2005	14	1	1566.51
27	12/3/2004	12/3/2004	14	2	651.93
10	9/30/2004	9/30/2004	14	8	560.00
2	8/3/2004	8/3/2004	16	0	60.00

3. **Click on the "Start a New Payroll" button .**

The following screen will appear:



4. **Select the "Starting Payroll Date" and "Ending Payroll Date.**

You may click on the drop down arrows for calendars or you may click on the small calendar button to select both the starting and ending date.

5. **Select the Tax Tab Year and State Tax Code (optional).**

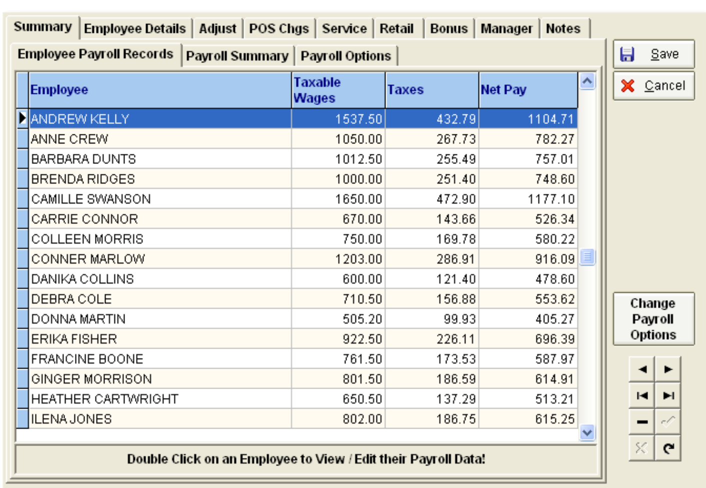
It is not necessary to enter this information if you have already set the defaults in the Program Preferences. This can be done by clicking on "Company" on the Menu Bar, selecting "Setup Program Preferences" and clicking on the "Payroll" tab.

6. **Set your Payroll Scan Options and click the "Continue" button.**

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Payroll Records Tab

This is the listing of all employees for this pay period. To get detailed information about an employee, double click that employee's name. Or, highlight the name and click the "Employee Details" tab.



Employee	Taxable Wages	Taxes	Net Pay
ANDREW KELLY	1537.50	432.79	1104.71
ANNE CREW	1050.00	267.73	782.27
BARBARA DUNTS	1012.50	255.49	757.01
BRENDA RIDGES	1000.00	251.40	748.60
CAMILLE SWANSON	1650.00	472.90	1177.10
CARRIE CONNOR	670.00	143.66	526.34
COLLEEN MORRIS	750.00	169.78	580.22
CONNER MARLOW	1203.00	286.91	916.09
DANIKA COLLINS	600.00	121.40	478.60
DEBRA COLE	710.50	156.88	553.62
DONNA MARTIN	505.20	99.93	405.27
ERIKA FISHER	922.50	226.11	696.39
FRANCINE BOONE	761.50	173.53	587.97
GINGER MORRISON	801.50	186.59	614.91
HEATHER CARTWRIGHT	650.50	137.29	513.21
ILENA JONES	802.00	186.75	615.25

Note: For more information on this screen, please refer to the Envision Users' Guide or Help Index.

Employee Details Tab

This screen shows the details for a single employee for this pay period.

Payroll Employee Detail Summary

The left side of the screen is a summary of the payroll period earnings, and charges for this employee.

Hours / OT Hrs: The number of hours registered on the Employee Time Clock.

H Rate: The hourly rate of pay you set when you entered this employee into the system.

W Salary: If you entered a Weekly Salary for this employee instead of an hourly rate, that Salary is shown here. NOTE: If you enter Hours and an Hourly rate above this field, it will override this weekly salary amount. Leave the Hours and H Rate blank to use this salary amount.

Daily Rental Fee: This amount is used for those employees who rent shop space from you to perform their services. You set this amount when you entered the Employee into the system. You may change it for this pay period by entering a different amount here.

Employee Payroll Calculation

This area of the screen shows how the pay for this employee is calculated.

Note: a "+" adds to the "Wages Due", a "-" subtracts from it, and the "=" sign indicates a totaling of the information above.

Wages/OT Due: This is the amount based on hours worked or salary as shown above on the screen.

+ Std Commissions: This is the amount of commission money that is not based on an Override.

+ Commission Overrides: This is the Commission amount that was set by the Overrides you entered into the commission plan used for this employee.

- OH/Labor Comm Deduction: Any Overhead (OH) or Labor commission deductions you entered into the commission plan will be shown here.

+ Payroll Adjustments: This is the amount of additional pay that the selected employee will receive from any pay adjustments you may have created and applied to the employee's records.

+ Other Pay = Gross Pay: This amount is the total of all the above calculations and equals the gross pay amount.

- Post Tax Pay Adjustments: This is the amount of pay that is deducted from the Taxable Wages. This is also an amount that is calculated from any pay adjustments you may have created and applied to the employee's records.

+ Tips Received and Reported Manually: Tips received are automatically entered here from the POS screen. You must enter any other tips in the Field provided.

=Taxable Wages: This is a sub total of the items listed above.

- Federal / State Taxes: This number is derived from the settings you entered when you entered the employee into the system. The number of deductions, the State, etc.

- Employee POS Chgs: If this employee purchased items from you and requested they be deducted from their pay, the Point of Sale module will present the total here.

- Rental Chg: If this employee rents space and/or equipment from you, the total amount of the Daily fees you charge are shown here.

= Net Paid: This is the total of all items above this item. Only "Tips" are not in this figure.

Employee Payroll Detail Tabs (Commissions, Taxes, Override, Deduct, Sales)

These screens will contain the details that make up the totals on the left side of the screen. Click on each tab to examine and change those items that are presented in these fields. This gives you complete control over all details of pay for each employee for each pay period.

Recalculate/Rescan Button

Click the "Recalculate" button to recalculate the amounts and totals in the payroll if you have entered a new amount into any of the fields. Click the "Rescan" button to rescan the payroll without including any amounts you may have entered or changed in the fields to the left.

Print Employee Payroll Summary Button

Click this button to print a summary sheet of the selected employee's payroll information.

Payroll Check Number Button

Enter the check number for the selected employee's check into this field.

Print Payroll Check Button

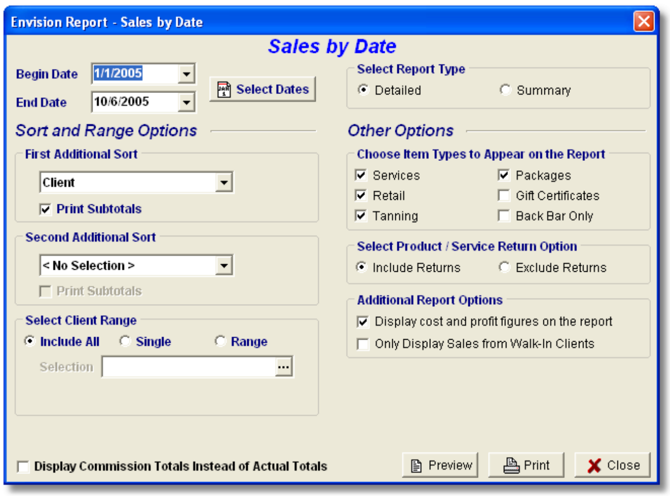
Click this button to print the selected employee's payroll check.

Notes

Reports

Report Options

Envision has powerful reporting capabilities. Each report you select from the "Report" menu, will first ask you to select what data you wish to display on the report. This is done through the use of a Report Query screen. A sample Query screen is shown below. These screens will vary for each report but will have the same layout as this sample.



Select Date Range

Click the large "**Select Dates**" button and you will see a screen with 2 calendars for setting the Begin and End dates.

Begin Date - End Date
Using these two fields enter the range of dates you wish to see data. You may click the small drop down button in each field to select a date
from a calendar. Note, that it's faster to click the "Select Dates" button.

Select Sort and Range Options

Depending upon which report you have selected to print, the items shown in this area of the screen will vary, but how you use them is the same for all reports. The Sort options allow you to specify what type of information you would like to see in the first columns of the report. The Range allows you to view information for all items selected, a specific item, or a range of items. In this sample screen shot, if you select "Include All" the drop down list is not applicable, but if you choose "Single", you would have to select a client from the listing of clients. The options available will vary from report to report depending upon what applies.

Select Report Type

When there are variations on a basic report for example, one report called "Sales" and another report called "Sales - Detailed", the report you chose will be checked, but you may select one of the other variations here.

Other Options

These options will vary depending on the type of report you choose to run. Below is an explanation of the "Other Options" shown on this sample screenshot.

Item Types: Select the item types that you would like to appear on the report.

Product / Service Return: Choose to either include or exclude returns in your report.
Additional Report Options: Choose whether or not to display cost and profit figures or select "Only Display Sales from Walk-in Clients" if you would like to run a report only for information on Walk-in Clients.

Report Query Buttons

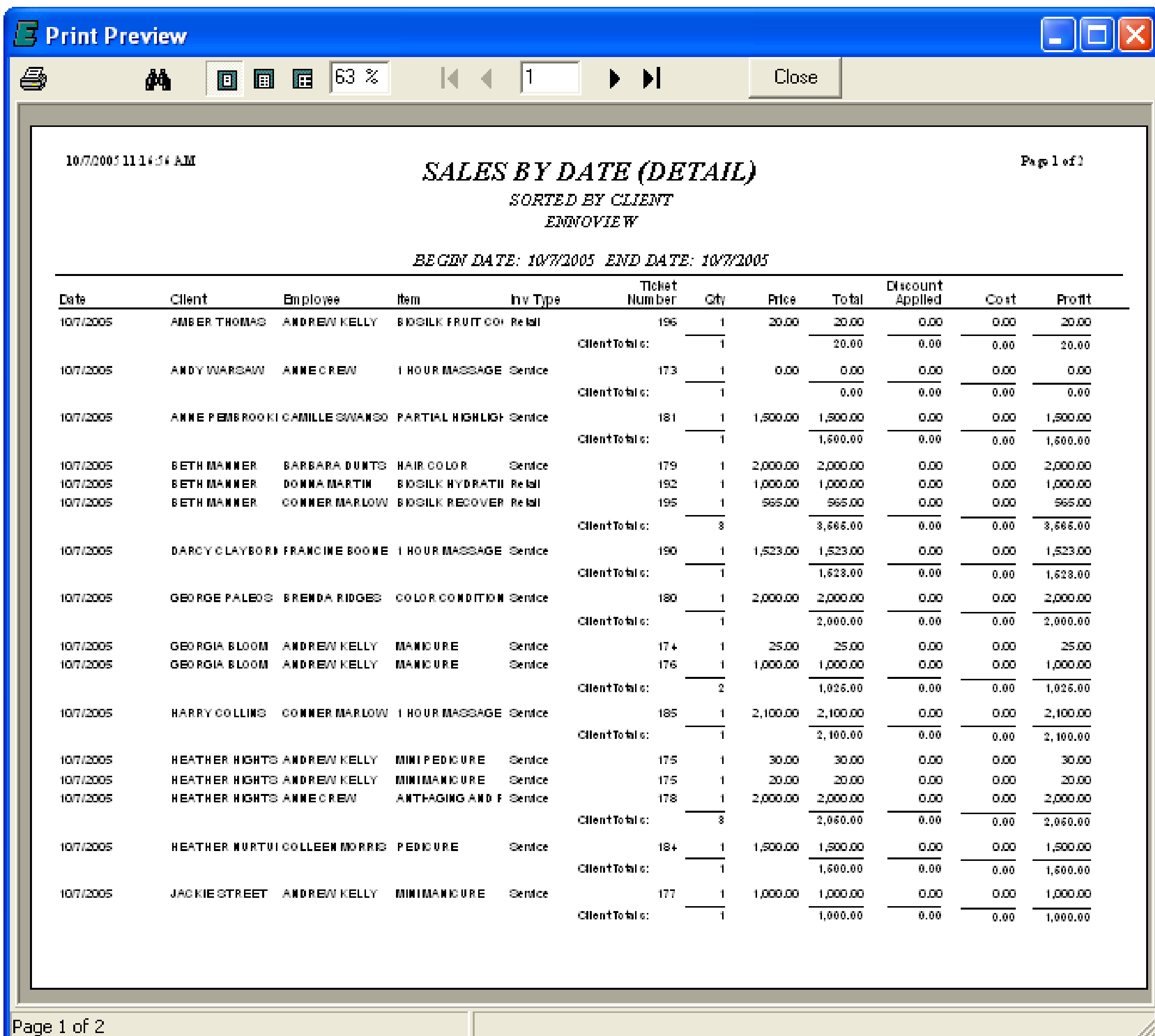
Preview: Click this button to display the report on the screen. You may send it to the printer from the preview screen.

Print: Click this button to immediately send the report to the printer. Make sure the printer is on with paper loaded.

Cancel: Click this button to immediately close this screen and discard any settings you have made.

Viewing Reports

Before printing a report, you can Preview it by clicking the "Preview" button on the Query screen. This allows you to quickly see if the Query settings you have chosen yield the report you wanted.



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SALES BY DATE (DETAIL)
SORTED BY CLIENT
ENNOVIEW

BEGIN DATE: 10/7/2005 END DATE: 10/7/2005

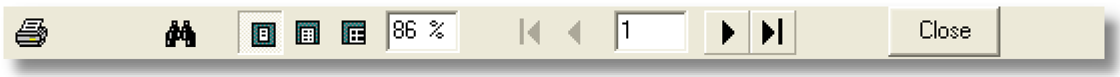
Date	Client	Employee	Item	Inv Type	Ticket Number	Qty	Price	Total	Discount Applied	Cost	Profit
10/7/2005	AMBER THOMAS	ANDREW KELLY	BIOSILK FRUIT CO	Retail	196	1	20.00	20.00	0.00	0.00	20.00
					Client Totals:	1		20.00	0.00	0.00	20.00
10/7/2005	ANDY WARSAW	ANNE CREW	1 HOUR MASSAGE	Service	173	1	0.00	0.00	0.00	0.00	0.00
					Client Totals:	1		0.00	0.00	0.00	0.00
10/7/2005	ANNE PEMBROOKI	CAMILLE SWANSO	PARTIAL HIGHLIGH	Service	181	1	1,500.00	1,500.00	0.00	0.00	1,500.00
					Client Totals:	1		1,600.00	0.00	0.00	1,600.00
10/7/2005	BETH MANNER	BARBARA DUNTS	HAIR COLOR	Service	179	1	2,000.00	2,000.00	0.00	0.00	2,000.00
10/7/2005	BETH MANNER	DONNA MARTIN	BIOSILK HYDRATI	Retail	192	1	1,000.00	1,000.00	0.00	0.00	1,000.00
10/7/2005	BETH MANNER	CONNER MARLOW	BIOSILK RECOVER	Retail	195	1	565.00	565.00	0.00	0.00	565.00
					Client Totals:	3		3,566.00	0.00	0.00	3,566.00
10/7/2005	DARCY CLAYBORI	FRANCINE BOONE	1 HOUR MASSAGE	Service	190	1	1,523.00	1,523.00	0.00	0.00	1,523.00
					Client Totals:	1		1,628.00	0.00	0.00	1,628.00
10/7/2005	GEORGE PALEOS	BRENDA RIDGES	COLOR CONDITION	Service	180	1	2,000.00	2,000.00	0.00	0.00	2,000.00
					Client Totals:	1		2,000.00	0.00	0.00	2,000.00
10/7/2005	GEORGIA BLOOM	ANDREW KELLY	MANICURE	Service	174	1	25.00	25.00	0.00	0.00	25.00
10/7/2005	GEORGIA BLOOM	ANDREW KELLY	MANICURE	Service	176	1	1,000.00	1,000.00	0.00	0.00	1,000.00
					Client Totals:	2		1,026.00	0.00	0.00	1,026.00
10/7/2005	HARRY COLLINS	CONNER MARLOW	1 HOUR MASSAGE	Service	185	1	2,100.00	2,100.00	0.00	0.00	2,100.00
					Client Totals:	1		2,100.00	0.00	0.00	2,100.00
10/7/2005	HEATHER HIGHTS	ANDREW KELLY	MINI PEDICURE	Service	175	1	30.00	30.00	0.00	0.00	30.00
10/7/2005	HEATHER HIGHTS	ANDREW KELLY	MINI MANICURE	Service	175	1	20.00	20.00	0.00	0.00	20.00
10/7/2005	HEATHER HIGHTS	ANNE CREW	ANTI-AGING AND F	Service	178	1	2,000.00	2,000.00	0.00	0.00	2,000.00
					Client Totals:	3		2,060.00	0.00	0.00	2,060.00
10/7/2005	HEATHER NURTUI	COLLEEN MORRIS	PEDICURE	Service	184	1	1,500.00	1,500.00	0.00	0.00	1,500.00
					Client Totals:	1		1,600.00	0.00	0.00	1,600.00
10/7/2005	JACKIE STREET	ANDREW KELLY	MINI MANICURE	Service	177	1	1,000.00	1,000.00	0.00	0.00	1,000.00
					Client Totals:	1		1,000.00	0.00	0.00	1,000.00

Previewed Report

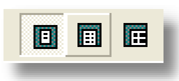
This area of the screen shows the report that will be printed. Depending upon what Zoom you have set, it will be either Large, Actual Size, or Small.

Report Tool Bar

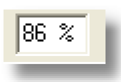
This tool bar appears for all Previewed reports. The purpose of each tool is shown below.



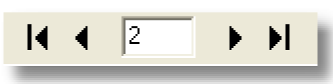
Click this button to immediately send this report to the printer



From left to right: View Full page, View Full Width of page, View the same size as it will print (100%)



As you click the three buttons above this number will change. You can manually enter a % of viewing size to get the preview to show exactly what you wish.



These buttons navigate through multi-page reports. From left to right: 1st page, Previous page, Page number (you may enter a page number here), Next page, and Last page.

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