Envision User's Guide

Version 4.0

Envision User's Guide

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Table of Contents

Part I Software License Agreement 1

Part II User Interface 5

Part III Register Program 7

Part IV Backup and Restore 8

Part V Use Demo Data 10

Part VI Utility Menu 11

Part VII Quick Start Guide 16

1 Intro ... 17
2 Step 1 - Setup Company Information and Store Hours ... 17
3 Step 2 - Setup Tax Options ... 18
4 Step 3 - Setup Program Options ... 18
5 Step 4 - Setup Employees ... 19
6 Step 5 - Setup Vendors ... 20
7 Step 6 - Setup Retail Products ... 21
8 Step 7 - Setup Services ... 22
9 Step 8 - Setup Tanning Services ... 23
10 Step 9 - Setup Clients ... 24
11 Finish Tab - Completion of the Quick Start Guide ... 24

Part VIII Setup Program Preferences 25

1 Setup Company Information ... 25
2 Setup Store Hours ... 26
3 Setup Tax Options ... 27
4 Setup Program Options ... 28
5 Setup Calendar Options ... 31
6 Setup POS Options ... 34
7 Enable Program Security ... 37
8 Setup Payroll Options ... 38
9 Setup Email ... 39
10 Setup Theme ... 40

Part IX Setup Program Security 43

1 Setup Security Profiles ... 43

Menu Options Tab ... 43
Other Options Tab ... 44
2 Setup Employee Passwords and Security Levels ... 44
3 Enable Program Security ... 45

Part X Setup Stations - Hardware 45

1 Station Printer Setup ... 46
2 Pole Display Setup ... 48
3 Cash Drawer Setup ... 49
4 Receipt Messages Setup ... 50
5 Pager Configuration ... 50
6 Select Station Id ... 51

Part XI Setup Salon Resources 52

1 Setup Calendar Resources ... 52
2 Setup Resource Categories ... 53
3 Setup Tanning Beds ... 55

Part XII Inventory 56

1 Retail Product List ... 56
Retail Product Edit ... 57
Retail Item Pricing, Qty & Commission ... 59
Retail Item Notes ... 61
Retail Item Sales History ... 61
2 Service List ... 62
Service Item Edit ... 63
Service Item Pricing, Qty & Commission ... 65
Price / Time Exceptions ... 67
Service Item Notes ... 67
Service Item Sales History ... 68
3 Tanning List ... 69
Tanning Item Edit ... 70
Tanning Item Pricing, Qty & Commission ... 72
Tanning Item Notes ... 73
Tanning Item Sales History ... 74
4 Package List ... 75
Package Item Edit ... 76
Package Details ... 77
Package Item Pricing, Qty & Commission ... 79
Package Item Notes ... 80
Package Item Sales History ... 80
5 Inventory Master List ... 81
Retail Product Edit ... 81
Service Item Edit ... 82
Tanning Session Edit ... 82
Package Edit ... 83
6 Purchase Orders ... 83

7 Receiving Inventory ... 87
8 Physical Count ... 89
9 Printing Inventory Labels ... 90
10 Inventory Department List ... 92
11 Inventory Class List ... 93
12 Manufacturer List ... 94
13 Vendor List ... 96

Part XIII Employee Setup 98

1 Employee List ... 98
Employee Address Tab ... 99
Employee Other Tab ... 100
Employee Certifications Tab ... 102
Employee Custom Tab ... 103
Employee Notes Tab ... 104
Employee Messages Tab ... 105
Employee Services Tab ... 106
Employee Payroll Tab ... 107
2 Employee Time Clock ... 110
3 Manage Time Cards ... 111
4 Employee Schedule ... 112
5 Employee Work History ... 113
6 Email Employee Notices ... 115
7 Employee Certification Setup ... 116
8 Employee Department Setup ... 116
9 Employee Type Setup ... 117

Part XIV Clients 117

1 Client List ... 117
Client Address Tab ... 118
Client Other Tab ... 120
Client Custom Tab ... 122
Client Payment Tab ... 123
Client Activity Tab ... 124
Client Products Tab ... 125
Client Notes Tab ... 125
Client Formulas Tab ... 125
Client Appts Tab ... 126
2 Client Images ... 128
View All Images ... 128
Compare Images ... 129
Edit Title and Notes ... 130
Image Editor ... 130
Adding Images ... 131
3 Loyalty Programs ... 132
Options Tab ... 132

SalesTab ... 133
Tries New Product / Service Tab ... 134
Referral Tab ... 134
Appointment Tab ... 134
4 Memberships ... 135
Edit Tab ... 135
Products / Services ... 136
5 Merge Duplicate Clients ... 137
6 Lookup Gift Certificates / Prepaids ... 138
7 Gift Certificates ... 139
8 Word Processor ... 141
Setup Merge ... 146
Setup and Activate Filters ... 147
Merge and Print / Email ... 149
9 Formula List ... 150
10 Lead Source Type List ... 151
11 Client Type List ... 152
12 Occupation Type List ... 153
13 User Type List ... 154
Part XV Appointments 155
1 Appointment Calendar Overview ... 155
Employees and Resources ... 156
Appointment Calendar Time / Time Slots ... 157
Delay Service Appointment ... 158
Calendar Display / View ... 159
Calendar Buttons ... 162
Menu Options - Actions Menu / Right Click on Available (Empty) Time Slot ... 163
Menu Options - Right Click On Appointment (Current Date) ... 171
2 Schedule Appointment Screen ... 178
Details Tab ... 178
Book Multiple Services Tab ... 182
Slots Available Tab ... 183
Prepaids Tab ... 183
Purchases Tab ... 184
Formulas Tab ... 185
Appointments Tab ... 186
3 Book Multiple Services or Packages ... 186
Book Multiple Services Tab ... 186
Time Slots Available Tab ... 190
Prepaids Tab ... 191
Purchases Tab ... 192
Formulas Tab ... 193
Appointments Tab ... 193
Cancellations Tab ... 194
4 Waiting List ... 194
Add an Appointment to the Waiting List ... 195
Check Waiting List for Available Appointments ... 196

5 Standing Appointments ... 197
Add a Standing Appointment ... 197
6 Salon Schedule ... 199
7 Appointment Viewer ... 200
8 Appointment Queue ... 201
Add New ... 202
9 Send Email Confirmations ... 203

Part XVI Point of Sale 204

1 Invoice ... 204
Actions Menu ... 206
Point of Sale Buttons ... 208
2 Adjust Button - Service Item ... 216
Price and Qty Tab ... 216
Discount Tab ... 217
Loyalty Tab ... 218
Coupon Tab ... 218
Cost & Commission Tab ... 219
3 Adjust Button - Retail Item ... 220
Price and Qty Tab ... 220
Discount Tab ... 221
Loyalty Tab ... 222
Coupon Tab ... 222
Cost & Commission Tab ... 223
4 Adjust Button - Package ... 224
Price and Qty Tab ... 224
Loyalty Tab ... 225
Coupon Tab ... 225
Cost & Commission Tab ... 226
5 Payment ... 227
Method of Payment Buttons ... 227
Keypad / Tips / Amount Due ... 228
Fast Cash Keys ... 228
Payment 1 & 2, 3 & 4 ... 228
Credit Card Button ... 229
Employee Deduction ... 229
Employee Tips Button ... 230
Cash Out Button ... 230
Return POS ... 230
6 Pay On Account ... 231
Transactions ... 232
Payment History ... 232
Void History Payment Button ... 232
CC Card Button ... 232
7 Z-Out ... 233
Drawer Tab ... 234
Cash Tab ... 235
Payment Checklist ... 236
Sales Tab ... 237

Notes Tab 238
Z-Out Buttons 238
8 Manager Override Password 239
9 Credit Card Preauthorization 239
Part XVII Accounting 240
1 Commission Plans 240
Service Commission Tab 241
Retail Commission Tab 243
Retail to Service Bonus Tab 245
Manager Commission Tab 245
2 Payroll 247
Start a New Payroll 247
Summary 249
Employee Payroll Records 249
Payroll Summary 250
Payroll Options 251
Employee Details 252
Adjustments 255
POS Chgs 256
Service Commission Plan Details 257
Retail Commission Plan Details 259
Retail to Service Bonus Plan Details 261
Manager Commission Plan Details 262
Payroll Notes 263
3 Enter Bills 263
4 Quick View 265
5 Send Owner Statistics Via Email / SMS 266
6 Chart of Accounts 266
7 Coupon List 267
8 Discount Plan List 268
9 Pay Adjustment List 269
10 Enter Payroll History 270
Part XVIII Reports & Graphs 272
1 Report Query Screens 272
2 Viewing Reports 273
3 Graphs 274
Graph Options 274
Graphs 274
Index 275

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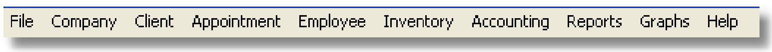
User Interface

The interface of Envision provides different methods for accessing windows and features. Use the following information to learn how to navigate through the system. You may find that one of these methods is more convenient than the others. It is best to become familiar with the interface so that you may become familiar with the fastest method for accessing screens and features in as little steps as possible.

Menu Bar



The Menu Bar, located below the Envision Management title bar, provides access to all windows and features of the program. You may setup security profiles that allow different types of access to each selection listed under each menu option.

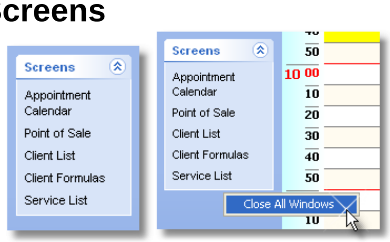
Tool Bar

The Tool Bar is located directly below the Menu Bar. The Tool Bar allows you to access features that are used the most with just one left click of your mouse. Rest your mouse arrow over the icons to view a popup that describes the function of each tool button.

Guides Window

The Guides window is located on the left hand side of Envision directly below the Tool Bar. This is a small window that will give you access to and guide you through different parts of the software. The categories listed in the Guides window provide access to general options, utilities, general reports and other important features that are associated with each category.

Screens



The "Screens" area is located directly below the Guides window. This feature will allow you to quickly access the screens that you already have open. For example, if you are using both the Appointment Calendar and the Point of Sale window, you can access these screens much more quickly with the

"Screens" feature of Envision. There are also some features of Envision, like Backup or File Maintenance that require all screens to be closed. You can right click in the blue area on the left and choose to "Close All Windows" so that all screens are closed out of without having to click on the "X" in the upper right hand corner of each screen.

List Tool Bar

At the top of every list in the program is a tool bar that can be used to perform basic functions in the list you are using.

New: Use this button to add an item to the list you have open. A new screen will open for you to enter information about the item you are adding to the list.

Edit: This button can be used to add or edit information for the selected (highlighted) item.

First: Click the "First" button to take you to the first item in the list.

Previous: This button will take you to the item above the selected (highlighted) item.

Next: Click this button to move to the next item in the list.

Last: The "Last" button will take you to the last item in the list you are using.

Actions: The "Actions" menu contains some of the same selections that are on the List Tool Bar as well as some useful features associated with the list you have open.

Exit: Click the "Exit" button to close the list you have open.

Search and Sort Fields

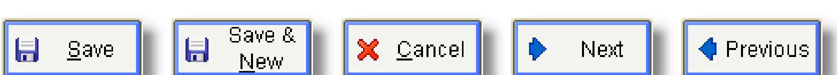
The Search and Sort features work together to help you quickly locate a record from a large listing.

The Search and Sort boxes appear throughout the program. They function the same wherever they are found. The Sort field contains a drop down box that allows you to sort your data in a number of ways. The screen you are viewing determines the choices presented. If you are viewing a list of clients you may sort by Full Name or Phone Number for example. However, if you are viewing an Inventory list, you will see choices such as Product # and Vendor.

The Search field is where you type the characters you wish to search for. As you type into this field, the listing will "Zero" in on the record you are looking for. For example, if you are looking on the Client List for "Murphy", as soon as you type the letter "M" into the search field, the listing will jump to the first "M" in the list. Then when you type the next letter, which is "u" in our example, the listing will display all last names that start with "Mu". You usually need to type only two or three characters to jump to the record you wish, even if you have thousands of clients in your Client list.

Note: Some screens will have "Search" only, as the sorting is handled a different way.

Save / Save & New / Cancel / Next / Previous



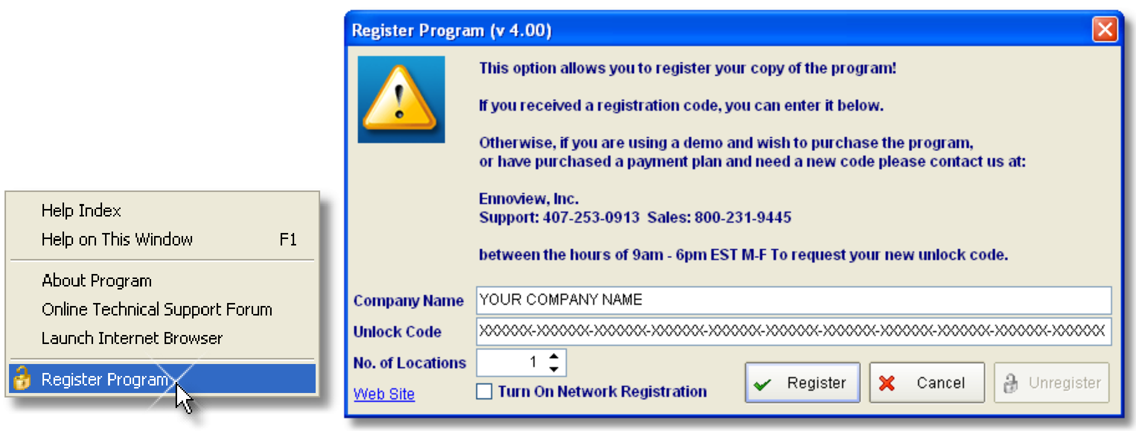
These buttons will be available when you are adding or editing an item in a selected list. Click the "Save" button to save the information you have entered and return to the list. Click the "Save & New" button to save the information you have entered and open a new window so that you may to add to the listing. The "Cancel" button will save the information you have entered, close the window that you are using, and will return you to the list. The "Previous" and "Next" buttons will take you to the previous or next record in the list.

Register Program

If you have used Envision for the full 30 day trial period, you will need to register the program if you would like to continue using the program. You must purchase Envision to obtain a registration code. You may also need to enter an Unlock Code if upgrades have been purchased for the use of Envision or if the program needs to be installed on an additional computer. Use the screen shown below to register the program. This screen can be reached from the "Help" menu selection. Select "Register Program" from the menu as shown in the image below.

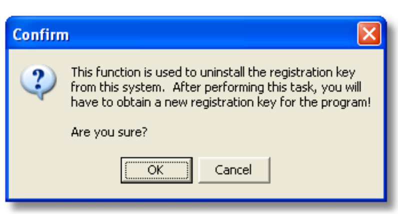
Selecting Register Program will open the following Registration Screen. The Company Name (this is be your business' name), are required to obtain the Envision Unlock Code. Call the number shown if a registration code is needed.

Note: An Unlock Code can only be acquired if the program has been purchased.



If you have purchased the Enterprise version of Envision, enter the correct number of locations.

Unregister



This function is used to uninstall the registration key from this system. After performing this task, you will have to obtain a new registration key for the program. You will be asked if you are sure you want to perform this function. You will receive a User Name and Unlock Code that you will need to provide to Ennoview.

Backup and Restore

One of the most critical operations you will need to perform is to Backup your data. Your data is more valuable than any other computer asset you possess. Your data is not replaceable if lost. Your data is stored on a device called a "Hard Disk" inside your computer (if on a Network, your data is stored on the Server's hard disk). This is a mechanical device and as always with mechanical devices, they are liable to fail. Besides the possibility of a hard disk failure somewhere in your future, there are also threats of viruses, corruption, fire, theft, and vandalism.

How often should you Backup? Backups are a necessary task that should be performed on a regular basis. How often you Backup is determined by answering the question, "How much data can you afford to lose?" If you are a very busy store, backup every day. There are stores that backup twice a day.

Another decision is where to store the backed up data. It is strongly recommended that you DO NOT save your data on the same Hard Disk you use for the program. If the Hard Disk fails, everything on it becomes unavailable. Ideally it should be stored off site so it is protected from a physical disaster such as a fire or theft of your computer. Since every machine has a 3.5" floppy diskette drive, this may be the most convenient destination for your data. They are very portable, cheap, and easy to transport. The disadvantage is they are not very reliable. They wear out easily, but they are cheap. If you choose to use these diskettes, keep multiple sets of data and NEVER use one set over and over as your only backup. Since they only cost about 25 cents each, there is no excuse for only having one set of disks. There are also other types of removable media that you may use to backup your data. There are portable devices available that you may install on your computer that provide much more space than a floppy disk. Devices like this usually connect to a USB port on your computer. These devices may use media cards or flash memory. This type of device is more expensive than floppy disks, however they provide much more space so that you may save more than one copy of your data on these devices. You may also use additional media cards, depending on the type of device you choose to use, that provide even more space. You may also use a zip drive to store your data.

How much data will be backed up? When you first start using the program there will be a very small amount of data. It may seem like a lot to you, but it really is very small. Also, Envision compresses the data it backs up using the industry standard called "Zip". You will probably use only one diskette for quite a while. When the data exceeds one diskette, the program will prompt you to enter another during Backup and it will span multiple disks.

Label your diskettes like this:

Set 1 - Disk 1   Set 1 - Disk 2
Set 2 - Disk 1   Set 2 - Disk 2
Set 3 - Disk 1   Set 3 - Disk 2

Rotate through the sets and take them off site. The next day bring in the next set, backup to them and then bring them off site with you.

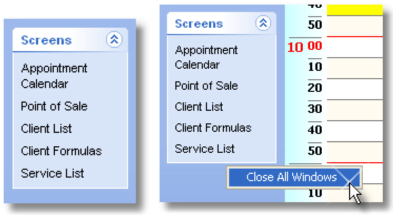
A better method of backup is to a network server that is off site. Just set the Backup destination to a particular spot on the server's hard disk and your data will be backed up very quickly. However, you must then name the backup files differently or you will only have one backup set since each successive backup will overwrite the previous one. A suggestion is to use names like this:

Envision1.zip
Envision2.zip
Envision3.zip

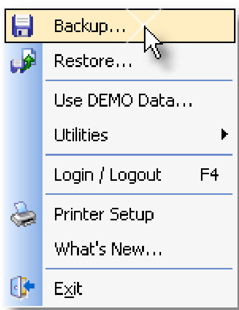
And so forth for as many "generations" of backup as you wish. If you wish to keep 4 sets of data, you would name them Envision1.zip through Envision4.zip and then start again with Envision1.zip and thereby overwrite the oldest set of data.

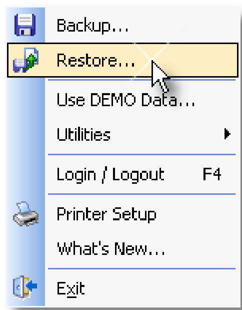
Note: You must close all screens to either Backup or Restore data. You may do this by right

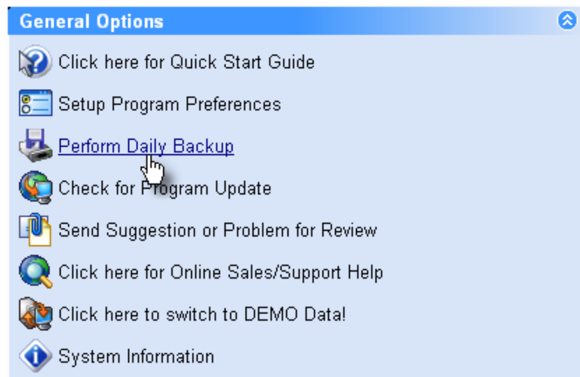
clicking in the "Open Windows" box (shown below) and left clicking on "Close All Windows".



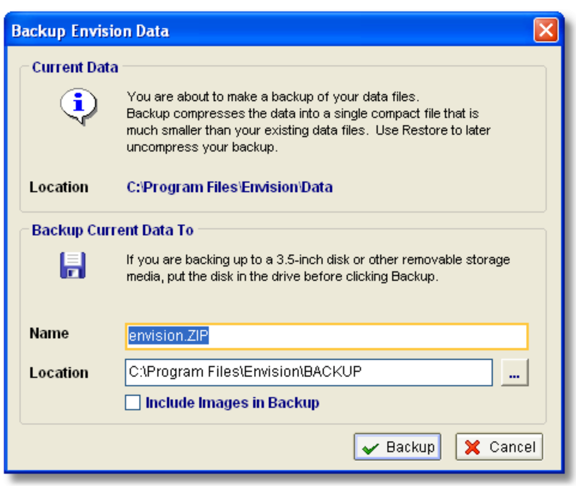
Backup and Restore can be reached by clicking on "File" on the Menu Bar and selecting either "Backup" or "Restore" as shown in the following images. You may also click on "Perform Daily Backup" under "General Options" on the Company Guide to open the Backup screen.

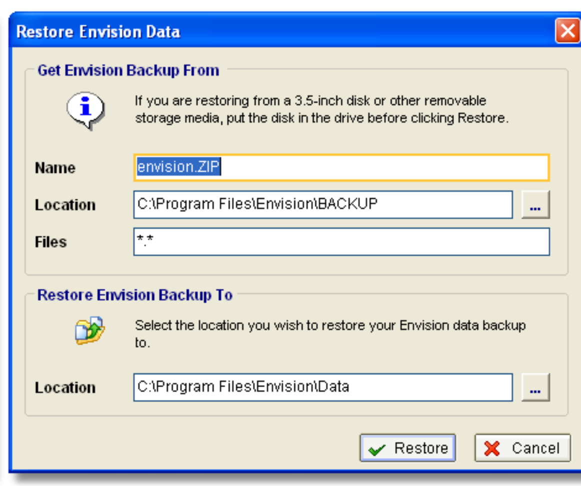






Here are the Backup and Restore screen shots.





Backup Current Location

Name: This is where you will enter the name of the Backup file.

Location: Enter the path to a backup disk and directory you wish to use. For example, if you are backing up to a floppy diskette, you would simply enter A:\

Backup / Restore Current Location

This area of the screen shows the location where your Envision data is currently stored. If doing a Restore, this would be your destination.

Restore Name / Location

When restoring data, use the same information in these two fields that you used for the Name and Location fields when you were Backing up.

Restore Destination

This is the location you wish the Restored data placed. It should be the same name as the "Current Location" shown on the Backup screen.

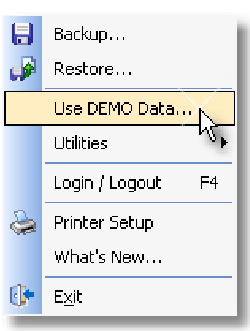
Weekly Backup and File Maintenance Reminders

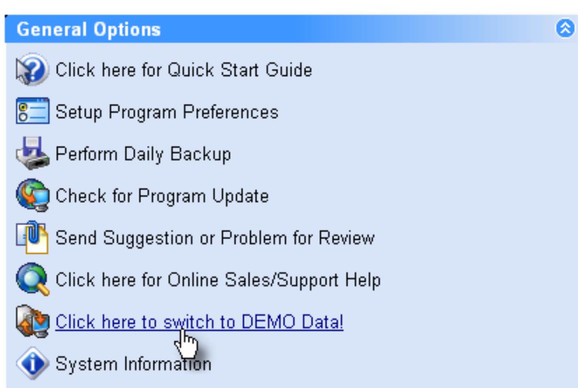
These screens appear once a week if you have not performed a Backup or File Maintenance during that period. We recommend you don't turn these reminders off. These screens will appear when you first turn on the program. All users and screens must be closed to perform these operations. It is HIGHLY recommended that you click "OK" for either of them and do the Backup and File Maintenance.

Use Demo Data

The Demo Data option allows you to use a separate set of data for sampling and testing. This option allows you to keep all of your business' information and sampling information separate from each other. Use of the Demo Data can help to ensure that your Live Data is accurate for reports, calculations and general use of the program.

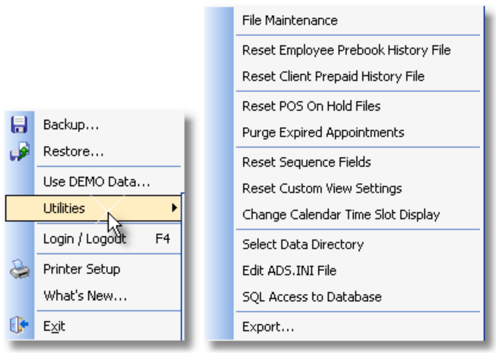
The Demo Data can be reached by clicking on "File" on the Menu Bar and selecting "Use Demo Data" from the menu. You may also click on "Click Here to Switch to DEMO Data" under "General Options" on the Company Guide screen.





Utility Menu

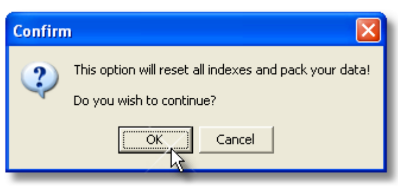
This choice available from the "File" menu, gives you several important functions to help you maintain the program, and perform certain functions you might need.



Note that the functions you can perform using this menu should be performed by managers or other knowledgeable employees. You might want to revisit the "Setup Security" screens shown on the "Company" menu and ensure these screens are included in a "Manager" or "Owner" type profile only.

File Maintenance

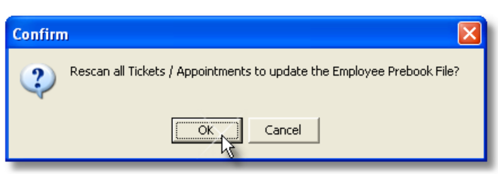
Re-indexing the files and re-packing the data ensures fast, error free operation of the program and should be done at least weekly or more often if your business is large and busy.



The program defaults to performing this function weekly when you first enter the program. You can manually perform it by selecting this utility. You must have all users out of the system for this to function.

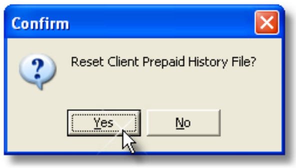
Reset Employee Prebook History File

Use this option to rescan all tickets and appointments to update the Employee Prebook File.



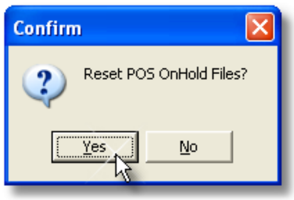
Reset Client Prepaid History File

This option will scan through the prepaid history and verify that all the information and quantities are correct.



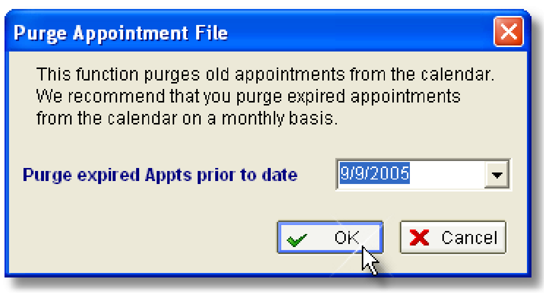
Reset POS On Hold Files

This option will fix any problems with transactions that have been placed on hold.



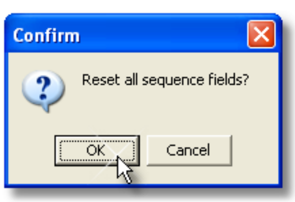
Purge Expired Appointments

Select this choice to remove appointments from the Appointment Calendar that were scheduled before the date you select. This will clean the data base of excess information it is storing and reduce your backup file size.



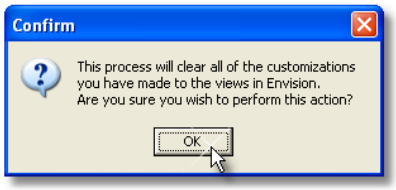
Reset Sequence Fields

This is a maintenance function you may be requested to select by the Technical Support department. This option's primary function is to correct errors created by doing partial restore of backed up data.



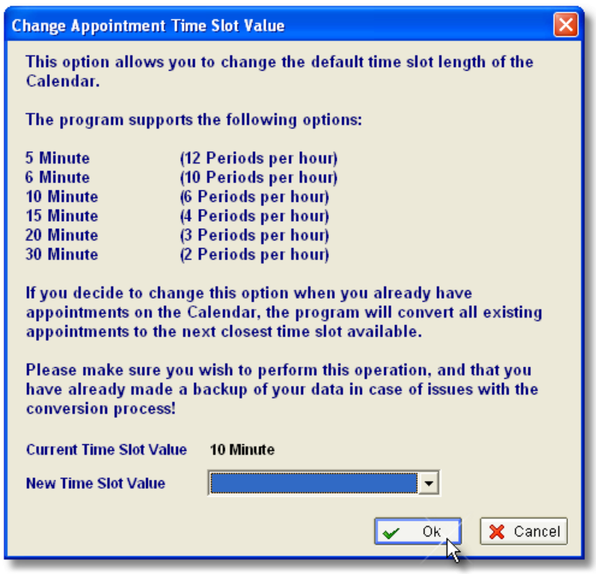
Reset Custom View Settings

The program automatically saves the changes you have made to the way you view the lists (Client List, Inventory List, etc.) and other screens. You may have shrunk a column or even moved a column to another location. By selecting this choice all of those settings are returned to their default value.



Change Calendar Time Slot Display

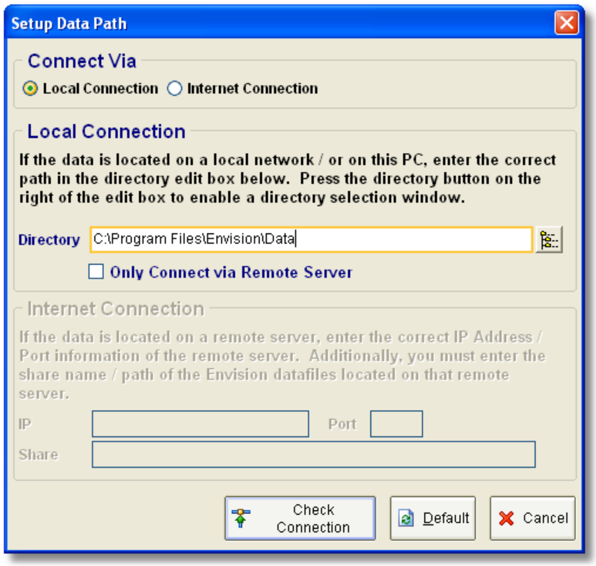
This option allows you to change the default time slot length of the Calendar. If you decide to change this option when you already have appointments on the Calendar, the program will convert all existing appointments to the next closest time slot available.



Note: Please make sure you wish to perform this operation, and that you have already made a backup of your data in case of issues with the conversion process!

Select Data Directory

Normally, the program will create a directory on your computer when it installs and this screen will not be necessary for you to use. However, if you add a hard drive to your computer or if you are on a network and running the program from a server or even the Internet or an Intranet, you will have to tell the program where the data you wish to use is located. Also, you may use this screen to switch the program between different data sets.



Connect Via

Click either "Local Connection" or "Internet Connection" to make the correct section available on this screen.

Local Connection

If you know the location of the data, enter it here. If not, click the small button to the right with the folders on it, and navigate to the location of the data.

Only Connect Via Remote Server

This option forces a connection between Envision and the Advantage Database Server if you are using additional workstations on a network.

Internet Connection

If the data is located on a remote server, enter the correct IP Address / Port information of the remote server. Additionally, you must enter the share name / path of the Envision data files located on that remote server.

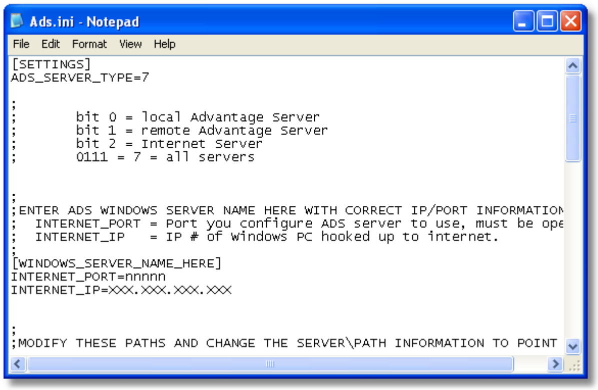
IP: Enter the TCP/IP address of the server containing the data.
Port: Enter the Port number that gives you access to the server.
Share: Enter the share name assigned to the drive / directory where the data is located on the server.

Note: This information is available from your network administrator.

When finished, click the "Check Connection" button to save. You may click the "Default" button to have the program enter the default location of the data.

Edit ADS.INI File

This choice appears on this menu for use by Envision technical support personnel. You should not use this on your own.

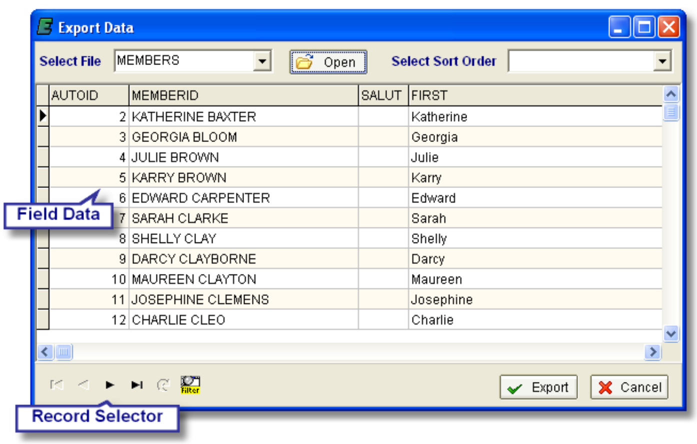


SQL Access to Database

This option is available for more advanced users. This feature will allow you to make changes to the data in Envision.

Export

This utility allows you to select a database table within Envision and export the data it contains in a number of formats for external use. Once you click the "Export" button, you will launch a Wizard that will take you through the process step-by-step.



Select File

The first step in exporting data is to select from the drop down list the table you wish to export. Highlight the table and then click the "Open" button. Examine the fields displayed to ensure this is the table you would like to export.

Select Order

After selecting the table to export, you may select a sort order to export the data. Just choose which order you want from the drop down list.

Field Data

Shown in this area, are the fields and the data they contain. You can scroll up and down through the records, and also scroll left and right to view more fields in the table. Use the standard Windows slider controls at the left and bottom to do this.

Record Selector

From left to right these controls will:

- Move to First record
- Move to Previous record
- Move to Next record
- Move to Last record

Filters

Filtering is the term for selecting specific records from the entire database. When you have accumulated listings that are very large it is often difficult to scroll through hundreds or even thousands of records on the screen to find the one you want. By using filters you can reduce the number of records shown on the screen.

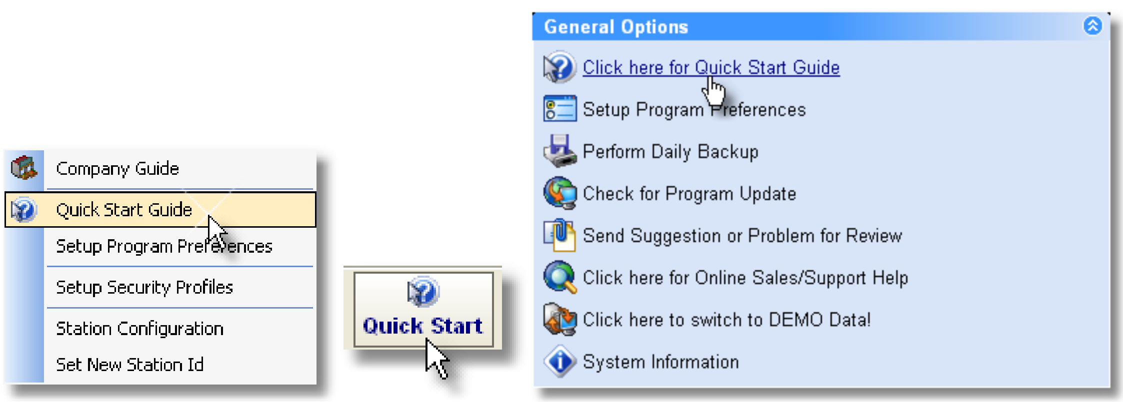
Export / Cancel Buttons

Click the "Export" button to launch the Export Wizard. This wizard will take you through the steps necessary to get the data exported in a format and style you wish. Click the "Cancel" button to close this screen and return to the previous screen.

Quick Start Guide

The Quick Start Guide allows you to quickly setup the program with company information and preferences.

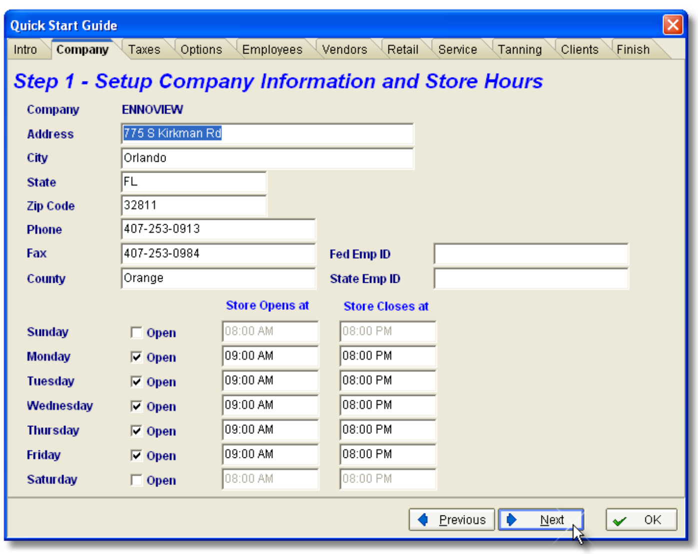
The Quick Start Guide can be reached by clicking on "Company" on the Menu Bar or click on the "Quick Start" button located on the Tool Bar. You may also click on "Click here for Quick Start Guide" under "General Options" on the Company Guide screen.



Intro

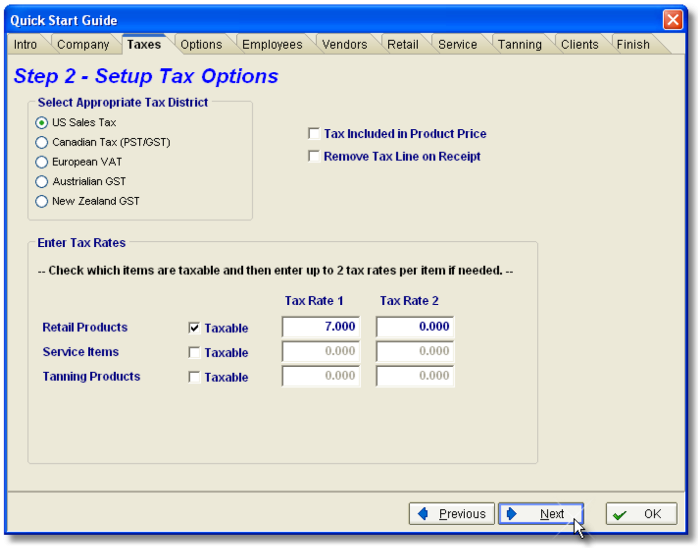
This first "Intro" screen explains which areas you can setup with the Quick Start Guide. Click the "Next" button to move to the next screen in the Quick Start Guide. The "Previous" button can be used to move back a screen in the Guide.

Step 1 - Setup Company Information and Store Hours



Use the "Company" screen to quickly setup company information and the hours that your store is open. The address entered here is the address that will be used for your company's information on Purchase Orders and the Word Processor. The hours that you enter here are the hours that are displayed on the Appointment Calendar.

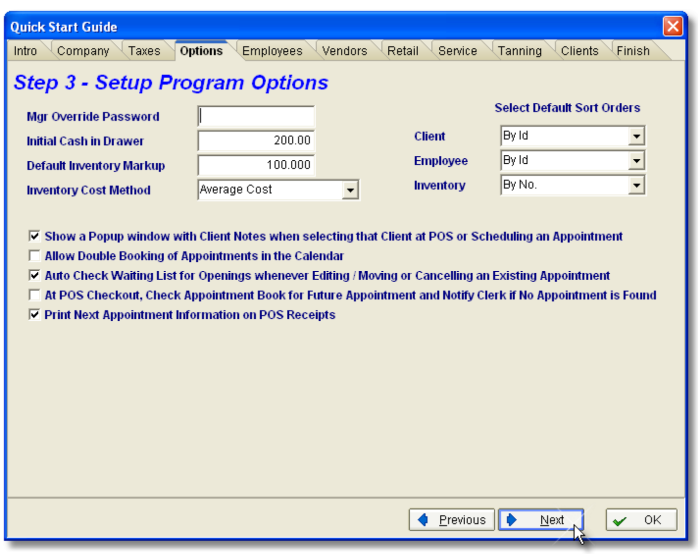
Step 2 - Setup Tax Options



Use the "Taxes" screen to setup your company's tax information for sales. First check the "Taxable" check box for all items listed that you must charge sales tax for. Then enter the sales tax rate under "Tax Rate 1". The tax rate should be entered as a whole number. If your location charges an additional sales tax that you must keep separate records for, enter it under "Tax Rate 2".

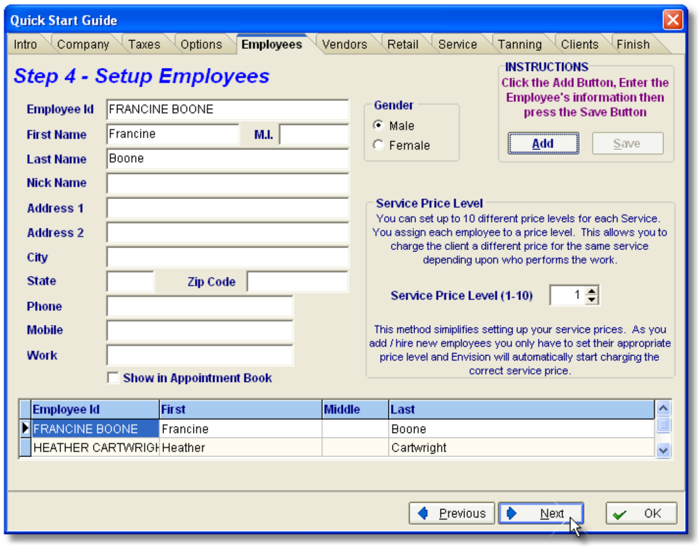
Note: Some locations charge a City sales tax in addition to the County/State sales tax.

Step 3 - Setup Program Options



This screen allows you to set some of the default settings for the program. Use the "Setup Program Preferences" option from the "Company" menu (located on the Menu Bar) to set more of these default settings.

Step 4 - Setup Employees



This "Employees" screen can be used to quickly enter your Employees. After entering the first employee's information, click the "Save" button in the upper right hand corner of this screen to save the information you have just entered, then click the "Add" button to open a screen with blank fields so that you may enter another employee.

Employee ID

You may enter the Employee ID as you wish, however it is recommended that you enter the full first name and full last name if you have a very large list of employees. It will be easier to search for an employee's name when selecting an employee to book an appointment or create a sales ticket. You may use numbers or abbreviated names if you wish, just keep in mind that it may be difficult for some of your employees to search for an Employee Id if they do not know everyone's number or abbreviated name.

Show in Appointment Book

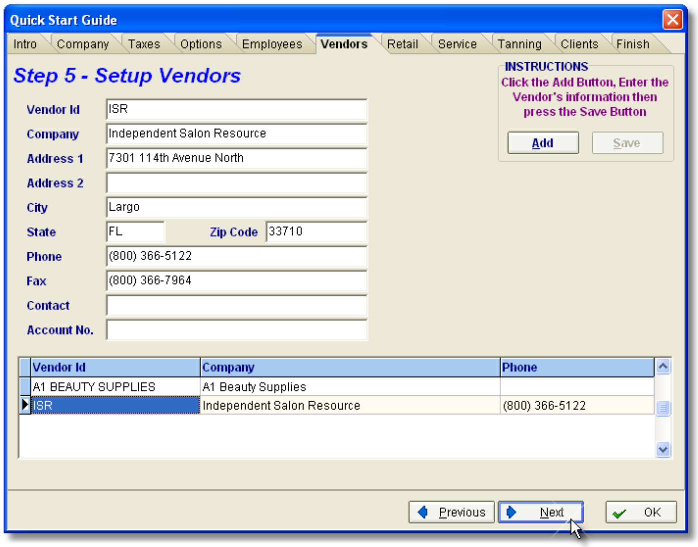
Uncheck this box if you do not want this employee displayed in the Appointment Calendar.

Service Price Level

Some shops base the amount charged for Services provided by the employee on the level of skill of the employee. For example, if you have a new stylist with limited skills, you might select Level 1 (of 10 possible). If you have a long time stylist who has a large following and is an expert, you may assign a skill level of 5. At the Point Of Sale (POS) you must select an employee. If you select an employee with a skill level of 1 you will get one price, if the employee who performed the service has a skill level of 5, more would be charged for the same service.

When setting up these skill levels, you have 10 levels available. Most shops that use skill levels for pricing only use 4 or 5.

Step 5 - Setup Vendors



The "Vendors" screen can be used to quickly enter your Vendors. After entering the first Vendor's information, click the "Save" button in the upper right hand corner of this screen to save the information you have just entered, then click the "Add" button to open a screen with blank fields so that you may enter another Vendor.

Vendor ID

The field can be an abbreviated form of the Vendor's company name. For example, "Walt's Equipment" could be shortened to a Vendor ID of "WALTEQ". There are no duplicate ID's allowed. This field is useful for sorting the Vendor listing and reports.

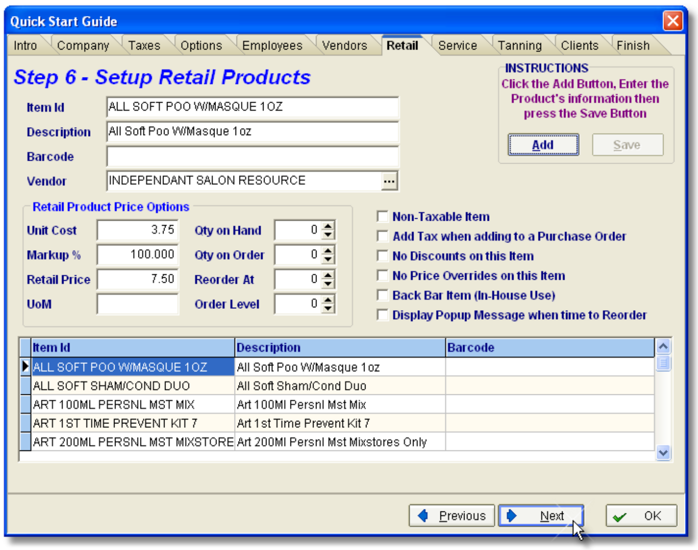
Vendor Contact

Enter the name of the person you most often speak to or correspond with, at the Vendor's company.

Vendor Account No.

Enter the Account number the Vendor uses for your business. This will be used to print on the Purchase Orders that you send to the vendor.

Step 6 - Setup Retail Products



You may use this screen to quickly add some or all of your retail products.

Item ID

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.

Barcode

If the product you are entering has a barcode and you are able to use a barcode scanner, click in this field (cursor must be blinking) and scan the barcode of the product. The number will be automatically entered in this field.

Product Pricing Table

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.

Unit Cost: Your cost per unit. If you pay $36 per case of 12, you would enter $3.

Markup % / 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 %" field blank.

UoM: Enter a Unit of Measure into this field, such as "Ea" for each.

Qty on Hand: Enter the Quantity you currently have in stock for this item.

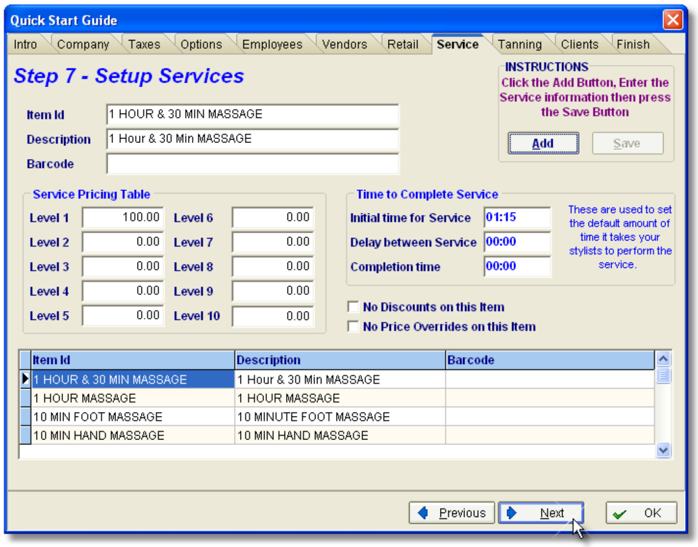
Qty on Order: Enter the Quantity you have on order for this item if you are currently ordering this product. If you already have the correct amount that you need, leave this number at zero and this field will be updated when you create a Purchase Order in the program.

Note: the program will maintain "Quantity on Hand and Quantity on Order" after you enter the initial values here. 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. Filling out Purchase Orders will increase the Quantity on Order.

Reorder At: Enter the level you wish to reach before you need to reorder this product.

Order Level: Enter the quantity of this item you normally reorder. This will be used to automatically fill in fields when creating a Purchase Order. If this field is left at "0", the difference between the "Qty on Hand" and "Reorder At" will be ordered when your products are scanned for a Purchase Order.

Step 7 - Setup Services



The "Service" tab allows you to quickly enter your services.

Service Pricing Table

For Service Items only, these 10 levels will be available. The purpose 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).

Time to Complete Service

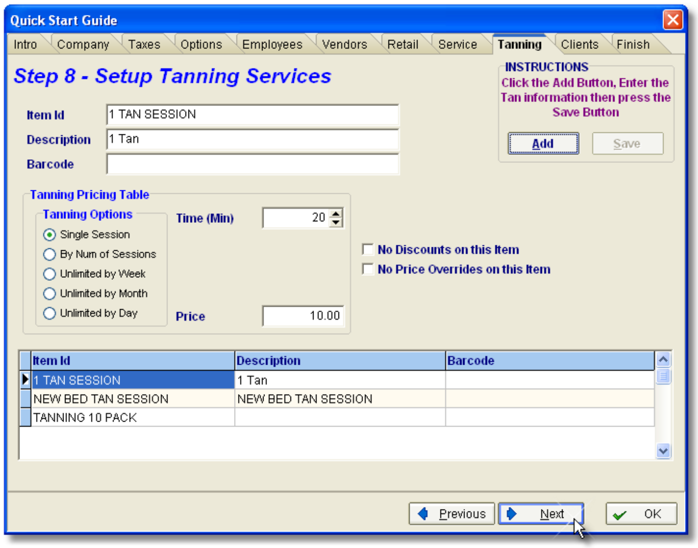
The three items in this area of the screen only appear when you are entering or selecting a Service item.

- **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.

Step 8 - Setup Tanning Services



Use the "Tanning" screen to quickly enter your tanning items.

Tanning Pricing Table

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" field appears to the right and you must select the number of sessions that the price will apply to.

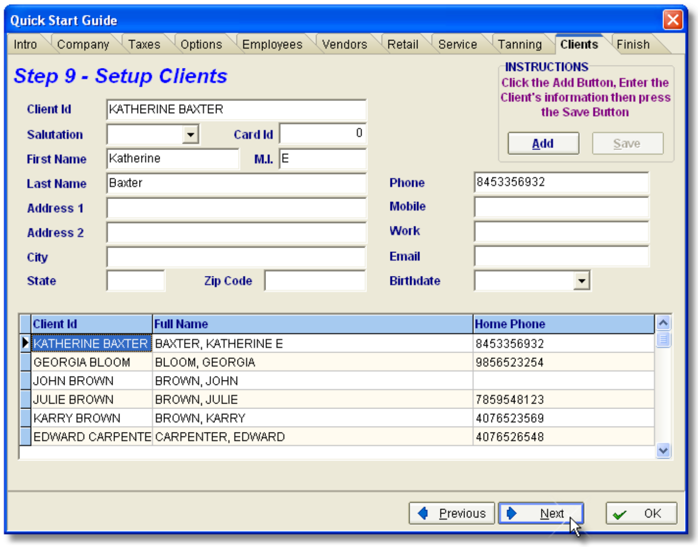
- **Unlimited by Week:** When this box is checked, the "No. Weeks" field appears to the right and you may select how many weeks of unlimited tanning the client gets for the price you will be entering.

- **Unlimited by Month:** When you check this box, the "No. Months" field appears to the right and you are able to select how many months of unlimited tanning the client gets for the price you will be entering.

- **Unlimited by Day:** Check this box and the "No. Days" field appears to the right allowing you to select how many days of unlimited tanning the client gets for the price you will be entering.

Use the small arrow buttons to increase or decrease the count of Minutes / Sessions / Weeks / Months / Days.

Step 9 - Setup Clients



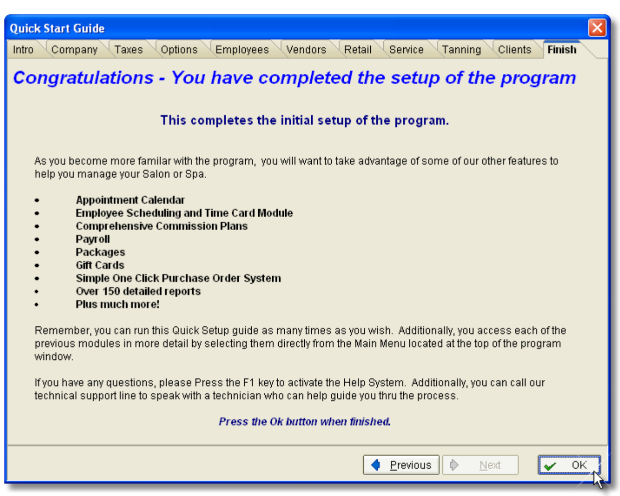
The "Clients" tab can be used to quickly enter all or some of your clients.

Client ID

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

Finish Tab - Completion of the Quick Start Guide

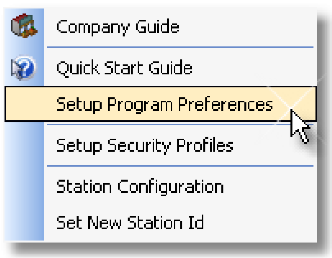


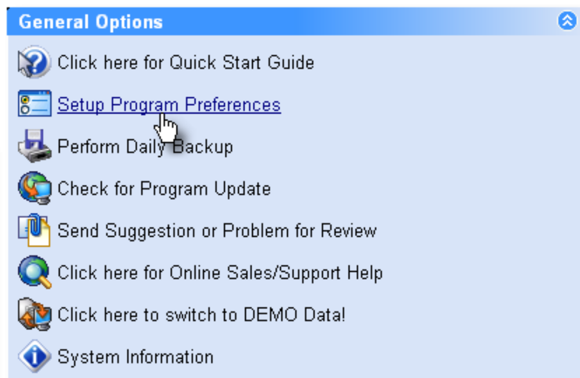
Click the "OK" button on the finish tab to complete the initial setup of the program. You can also access each of the previous modules in more detail by selecting them directly from the Menu Bar located at the top of the program window.

Setup Program Preferences

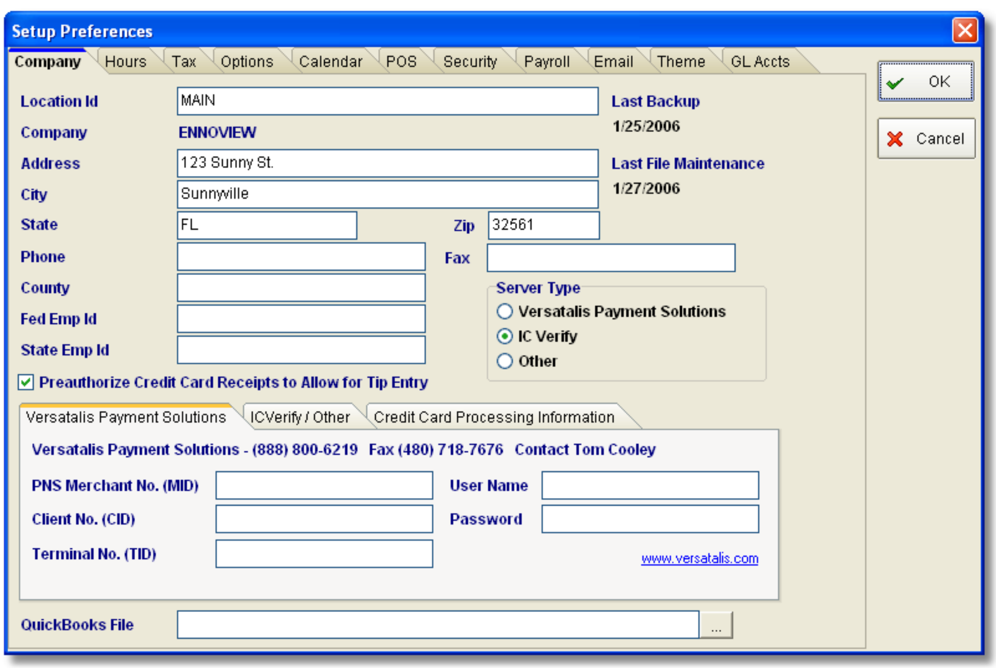
These setup screens should be completed before you start using the program. They set the operation of nearly every screen in the program.

This screen can be reached by selecting "Setup Program Preferences" from the "Company" menu as shown in the image below. This screen can also be accessed by clicking on "Setup Program Preferences" under "General Options" on the Company Guide window.





Setup Company Information



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.

Enter Company Information

Enter the company's address, city, state, zip, phone number, fax number, and county. You may also enter the Federal and State Employer Identification Number on this screen. 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.

The CC (Credit Card) Server information can be entered if you are setup with X-Charge or ICVerify

These options will only be available if you have purchased the Credit Card Processing Module. The CC Server Path and CC File Path may be entered when the CC Server software has been installed. The Server Type and CC Station may also be selected when the CC Server is setup. Check the "Preauthorize credit card Receipts to Allow for Tip Entry" box if you would like to process tips paid by credit at a later time.

Preauthorize Credit Card Receipts to Allow for Tip Entry

This option is available if the program is enabled with credit card processing. When checked, this will allow you to enter and process a tip after completing a sales transaction.

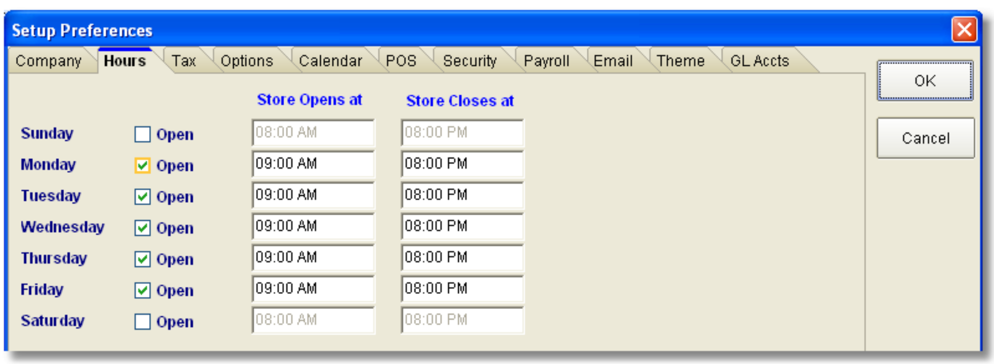
QuickBooks File

The "Quick Books File" field is the location of the QuickBooks file you will be using if you choose to use this feature. This option will only be available if you have purchased the Quick Books Interface. You may browse to the location on your hard drive by clicking on the browse button to the right of this field. This is the button with the three small dots. Select the location and click on the "OK" button.

Last Backup / Last File Maintenance

The date of your last Backup and File Maintenance are displayed at the bottom of this screen.

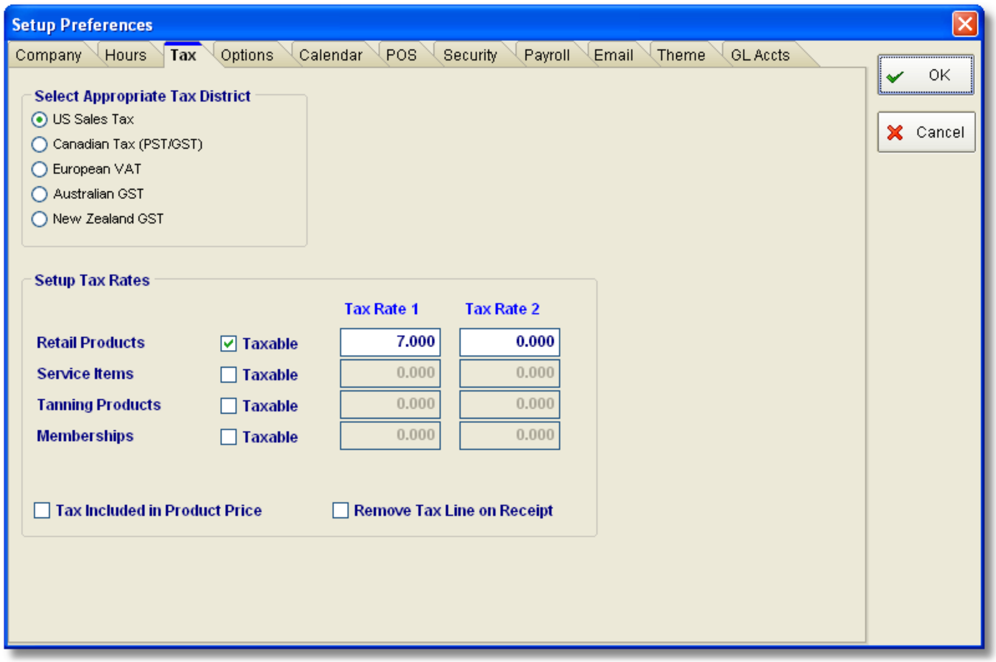
Setup Store Hours



Enter the hours and weekdays that your store will be open

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. If you would like to schedule appointments before or after your store hours, enter additional hours in the "Store Opens At" and "Store Closes At" fields.

Setup Tax Options



Setup Company Sales Tax US/Canadian/European VAT/Australian GST

Click the appropriate button. U.S. Sales tax is calculated differently than Canadian, European, and Australian sales tax.

Setup Company Sales Tax Rates

First click the "Taxable" button for all items listed that you must charge sales tax for. Then enter the sales tax rate under "Tax Rate 1". If your location charges an additional sales tax that you must keep separate records for, enter it under "Tax Rate 2".

Note: Some locations charge a City sales tax in addition to the County/State sales tax.

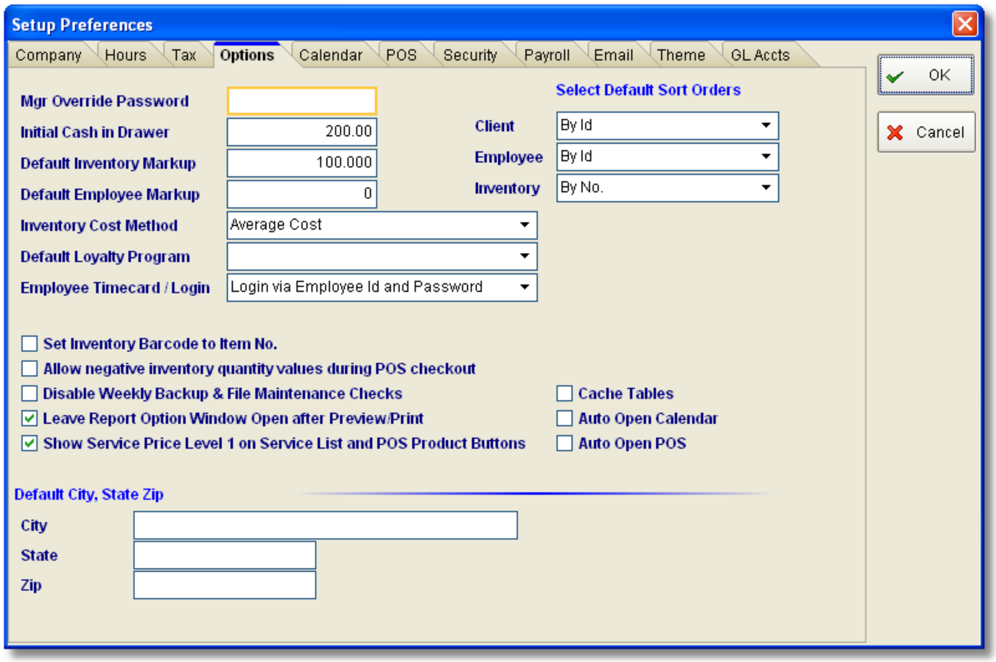
Tax Included in Product Price

Check this box if your retail price includes the tax amount.

Remove Tax Line on Receipt

Check this box if you do not want to display the amount of tax that the client is being charged on their printed receipt.

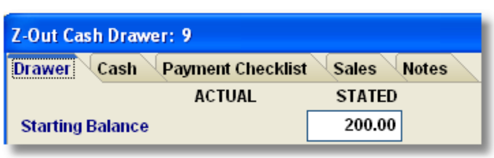
Setup Program Options



Enter a Manager Override Password

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 features like Recall Ticket, Void Ticket, and Remove Ticket in the Point Of Sale (POS) window.

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.

Set the Default Inventory Markup Percent

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%.

Set the Default Employee Markup Percent

Enter a number that is a percent of markup that will be used as the default for Employee purchases.

Inventory Cost Method

Select from the drop down list the method you want to use to cost your inventory.

Default Loyalty Program

Select a Loyalty Program that will be used for every new client that does not have a specific Loyalty Program selected in their client record. Loyalty Programs can be setup by selecting "Loyalty Programs" from the "Client" menu.

Employee Timecard / Login

Select the method for logging in and out of the program. You may use Employee Id Cards, Employee Id and Password or both.

Set Inventory Barcode to Item No.

This is an option that you can check if you do not already have barcodes for your products and services. The Item Number is automatically entered as the barcode number when you choose to add a new item to your Inventory list.

Allow Negative Inventory Quantity Values During POS Checkout

This option will allow the system to enter negative quantity values for items that are sold in the POS screen when the "Qty On Hand" value has not been updated immediately after receiving your order. When an item reaches a zero amount for the On Hand quantity, the system normally leaves the quantity at zero, however when this option is checked the system will continue to remove from the quantity on hand.

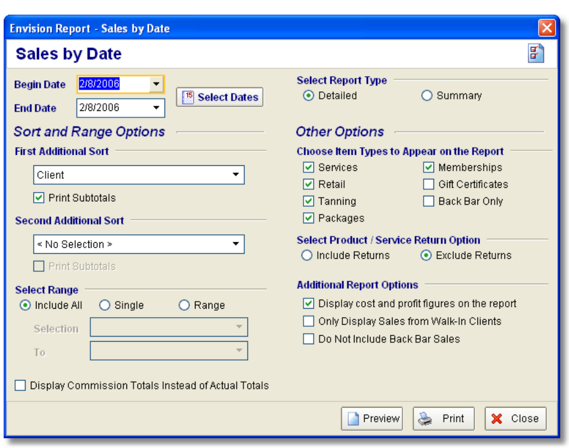
Disable Weekly Backup & File Maintenance Checks

Backup Reminder

File Maintenance Reminder

This is an option that you may check if you do not wish to be prompted to backup your data or do file maintenance of your data weekly. A window will appear weekly when Envision is first opened, asking you to backup your data and perform file maintenance, if this option has not been checked.

Leave Report Option Window Open



Report Option Screen

When you select a report to run, an option window appears for you to specify the type of information that you would like included in the report and how the report is sorted. When you preview or print a report this window closes. This option will leave this window open in case you need to make any changes to the information that is included in your reports without having to select the report from the menus again.

Show Service Price Level 1

POS Button

Check this option if you would like your Level 1 prices to be displayed on your Service List and your Product POS Buttons.

Default City, State, and Zip

These can be entered if most of your Clients will have the same City, State and Zip. If you enter a Default City, State, and Zip, you may change this information if it is not correct when you are entering the Client and Employee address information. You may also enter information into only one of these fields. If the state will always be the same, you may enter only the state.

Select Default Sort Orders

POS - Item Selection Field

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. For example, you may choose to set "Inventory" to "barcode" if you are using a barcode scanner. Every time the Point of Sale window is opened, the Item selection field is set to search by the barcode.

Cache Tables

Check this option if you are using the program on a network. This option will leave tables open in the background for files that you have opened in the program. The process of loading information through the network will be much faster. For example, if you are using the Appointment Calendar and need to lookup a Client Id for scheduling an appointment, the table for this information will stay open in the background even if you close out of the Appointment Calendar. The next time you lookup a client in the Appointment Calendar the process will still be much faster because the table for this file is still open in the background. If you choose to "Close All Windows" from the "Screens" box on the left side of the program, the tables that are open in the background will close.

Auto Open Schedule

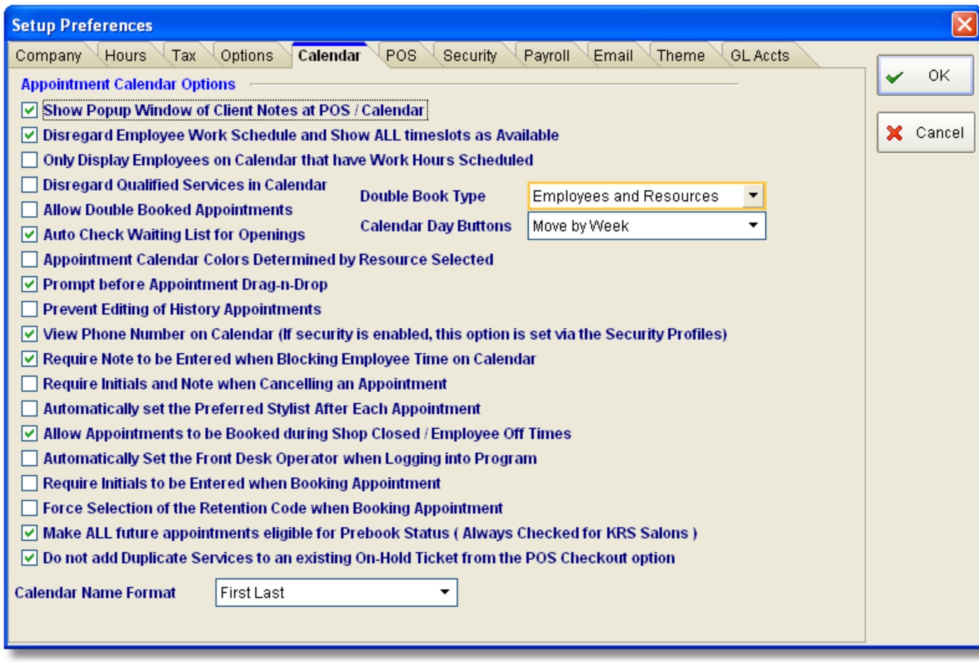
Check this option if you would like the Appointment Calendar to automatically open when you open Envision.

Auto Open POS

Check this option if you would like Envision to automatically open the Point of Sale window when the program is first opened.

Setup Calendar Options

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.



Show Popup Window of Client Notes at POS / Calendar

When you select a Client at the Point Of Sale or Appointment Calendar, you will see any Notes that have been entered for the client. This could be an important reminder for your front desk staff or the employee that is booking the appointment.

Disregard Employee Work Schedule and Show ALL timeslots as Available

Check this box so that your unscheduled or contractor type employees can be displayed on the Appointment Calendar. This option will override the option below which is to display only employees that have work hours scheduled on that day.

Only Display Employees on Calendar that have Work Hours Scheduled

This option will only display employees in your calendar that have work hours scheduled in Envision's Employee Schedule.

Disregard Qualified Services in Calendar

Check this box if you are not entering qualifications for your employees. If you don't check this, only employees with the proper qualifications can have specific services scheduled in the Appointment Calendar.

Allow Double Booked Appointments

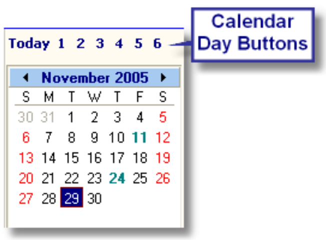
Double Booked Appointmetns

Check this box if you wish to allow double booking of a calendar time slot. Some services you perform allow one employee to handle two customers at a time. Checking this box allows for this.

Double Book Type

This option allows you to set how your appointments are double booked. This provides three different selections for Double Booking. You may double book for both your employees and your resources, or you may double book for only your employees or only your resources. This can be useful if you need to double book appointments for your employees while the Appointment Calendar searches for available resources. In this situation you would select the "Employees Only" selection.

Calendar Day Buttons



This options allows you to set whether the number buttons above your calendars will move the date by week or by month.

Auto Check Waiting List for Openings

If you check this box, the program will automatically scan the Waiting List to see which clients match the openings available.

Appointment Calendar Colors Determined By Resource Selected

Check here and the appointment calendar will display the colors you specify for different resources required for an appointment. Resources are things such as "Tanning Booth", "Massage Room", etc.

Prompt Before Appointment Drag-n-Drop

When this option is checked, you will be prompted to confirm whether or not it is acceptable to drag and drop an appointment into a different timeslot.

Prevent Editing of History Appointments

This option will prevent you from editing an appointment that was booked before the current date on your computer's calendar.

View Phone Number on Calendar

This option allows you to enable / disable viewing of client phone numbers on an employee basis when the program's security is enabled.

Require Note to be Entered when Blocking Employee Time on Calendar

When checked, this option will not allow you to block employee time on the calendar without entering a reason.

Require Initials and Note when Canceling Appointment

This option will require initials and a note (reason) when cancelling an appointment in the calendar.

Automatically Set the Preferred Stylist

When checked, this option will automatically set the stylist that performed the service as the "Preferred Stylist" after each appointment.

Allow Appointments to be Booked during Shop Closed / Employee Off Times

This option will allow you to book appointments when employees have time off or on days that you are closed.

Automatically Set the Front Desk Operator When Logging In

Check this option to automatically set the Front Desk Operator when an employee logs in to the program when the program security is enabled. The Front Desk Operator is the employee that should receive credit for any Addons and Prebooks. This is used mainly by businesses that are working with KRS Consulting.

Require Initials to be Entered When Booking Appointment

When booking appointments in the Appointment Calendar, you have the option of entering the initials of the person that is booking the appointment. Check this option if you would like to make this a requirement.

Force Selection of the Retention Code when Booking Appointment

This option will require you to select the type of retention for the client you are scheduling an appointment for.

Make ALL future appointments eligible for Prebook Status (Always Checked for KRS Salons)

With this option checked, the program will check for all future appointments scheduled with the same employee and client. When this option is not checked, the program will only check for future appointments scheduled with the same employee and client before completing the client's sales transaction (by clicking the "Cash Out" button) in the Point of Sale.

Do not add Duplicate Services to an existing On-Hold Ticket from the POS Checkout option

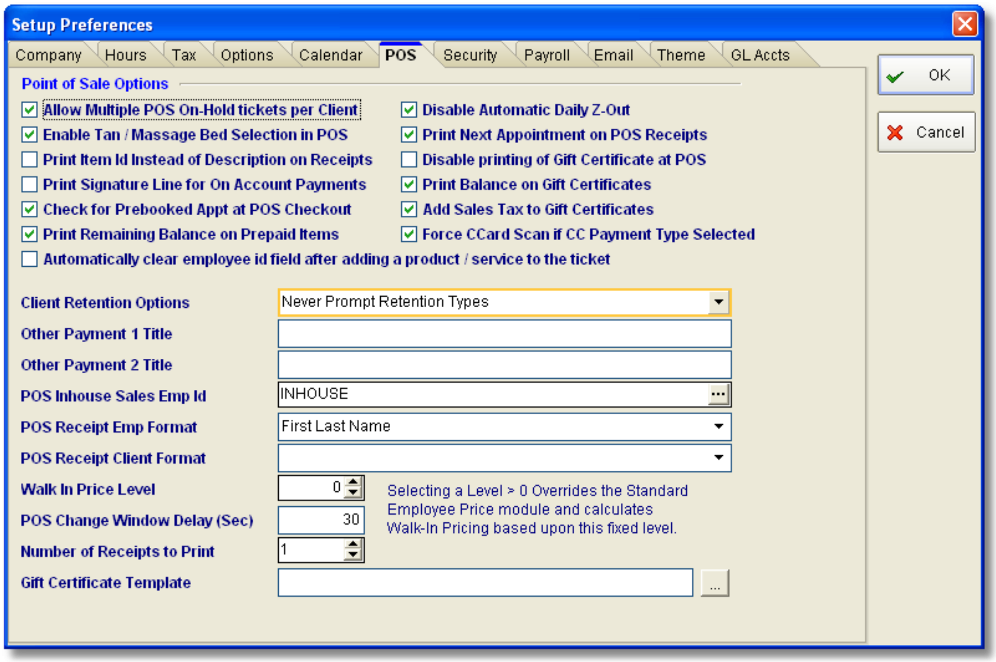
Check this option if you do not want to add the same services to a ticket that is "On-Hold" for the client you are checking out from the Appointment Calendar.

Calendar Name Format

Select the format for your clients' names to be displayed in the Appointment Calendar.

Setup POS Options

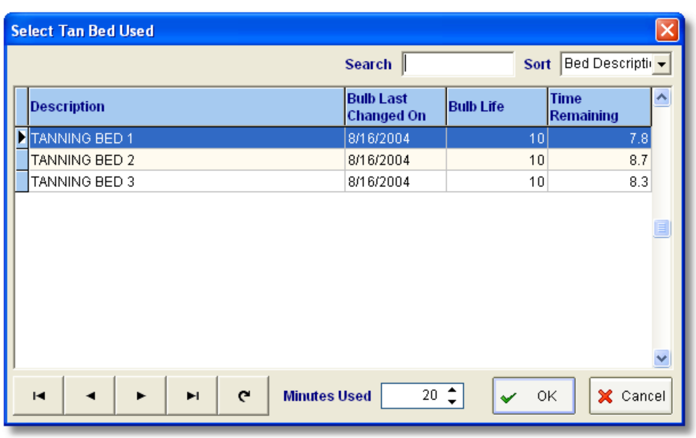
This screen allows you to set options for how the POS window will function. These are also options that you may choose to change as you continue to use the program.



Allow Multiple POS On Hold Tickets Per Client

This option will allow you to place more than one POS ticket on hold for each client.

Enable Tan / Massage Bed Selection in POS



POS - Tan / Massage Bed Selection Screen

Check this box to be able to specify which tanning bed was used for this customer when checking them out at the Point Of Sale.

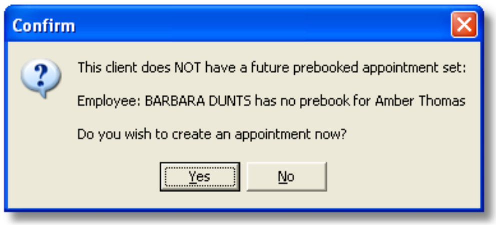
Print Item Id Instead of Item Description on Receipts

This option will print the Item Id that you entered for the item being sold instead of the description that you have entered.

Print Signature Line for On Account Payments

Check this option if you would like a signature line printed on your receipts when the "On Account" payment type has been selected.

Check for Prebooked Appt at POS Checkout



Prebook Prompt

Check this box to receive a prompt if a client does not have a future appointment when you are completing their sales transaction. You will be asked if you would like to create an appointment before checking the client out. If you click "Yes", the program will open or return to the Appointment Calendar.

Print Remaining Balance on Prepaid Items

When checked, this option will print the remaining balance on prepaid items used by the selected client during their current visit on the POS receipt.

Automatically Clear Employee Id Field

Select this option if you would like the Employee Id field cleared after selecting the first item. This will allow you to select a different employee before selecting the next item.

Disable Automatic Daily Z-Out

The program will automatically zero out the cash draw which summarizes the days sales. It does this by default each day at midnight. To disable this feature, check this box. It is recommended you only do this if you wish to continue on with the same cash drawer for consecutive days, or have a rigid policy of doing a Z-Out each morning or at close of business.

Print Next Appointment on POS Receipts

Check this box and the next appointment for this client will be printed on their receipt.

Disable Printing of Gift Certificate at POS

If this option is checked, a gift certificate (from the receipt printer) will not be printed.

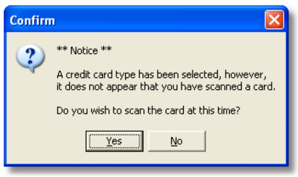
Print Balance on Gift Certificates

When checked, this option will print the remaining balance on gift certificates used by the selected client on the POS receipt.

Add Sales Tax to Gift Certificates

Check this box if you would like to add Sales Tax to the gift certificate. The client purchasing the gift certificate will pay the sales tax and the value of the gift certificate will include the sales tax. If the client that the gift certificate was purchased for uses the gift certificate for retail products, they will not need to pay an extra amount for sales tax. For example, if a client purchases a product that is $50 and their gift certificate's value is $50, they will still need to pay for the sales tax. If this option is checked, and your sales tax is 7%, the client purchasing the gift certificate will pay $53.50 for the gift certificate and the gift certificate is worth $53.50. When the client redeems this gift certificate for a product that costs $50, the sales tax is already paid for because the value of the gift certificate is $53.50.

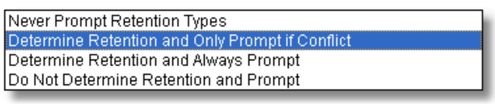
Force CCard Scan if CC Payment Type Selected



Scan Card Prompt

If you are using Envision's Credit Card Processing Module, you will receive the above prompt if this option is checked and you have not yet scanned a credit card. Click the "Yes" button to scan the card or click the "No" button to complete the sale.

Client Retention Options



Select the way in which the program determines the retention of the client. There are four options available. Select the option that will work best for your business.

Other Payment 1 & 2 Title

Payment Type Buttons

Use these fields to label the "Other 1" and "Other 2" payment buttons. These two buttons can be used for any other type of payment you accept.

POS In-house Employee

Some items sold do not get assigned to an employee at the time of sale. These are called "In-house" items. However, in order to track the sale of these items an "In-house" employee is created. This can be an imaginary name, Store Name, or a manager's name. No commissions will be applied to the sale of these items. From the drop down list, select the "In-house" employee's name.

POS Receipt Employee / Client Format

These two fields allow you to select what information about the employee and the client are printed on the receipts. Select from the drop down lists.

Walk-in Price Level

Many salons charge a different service price for walk-in clients vs. clients with appointments. When you created the service in inventory you may have set up to 10 price levels. Select which level you would like to charge walk-in's here. Note that 0 indicates no difference in price. Any number other than 0 removes the employee price advantage on that item.

POS Change Window Delay (Sec)

POS - Tips and Change Display

This field will allow you to change the amount of time (seconds) that the change that is due to the customer is displayed for.

Number of Receipts to Print

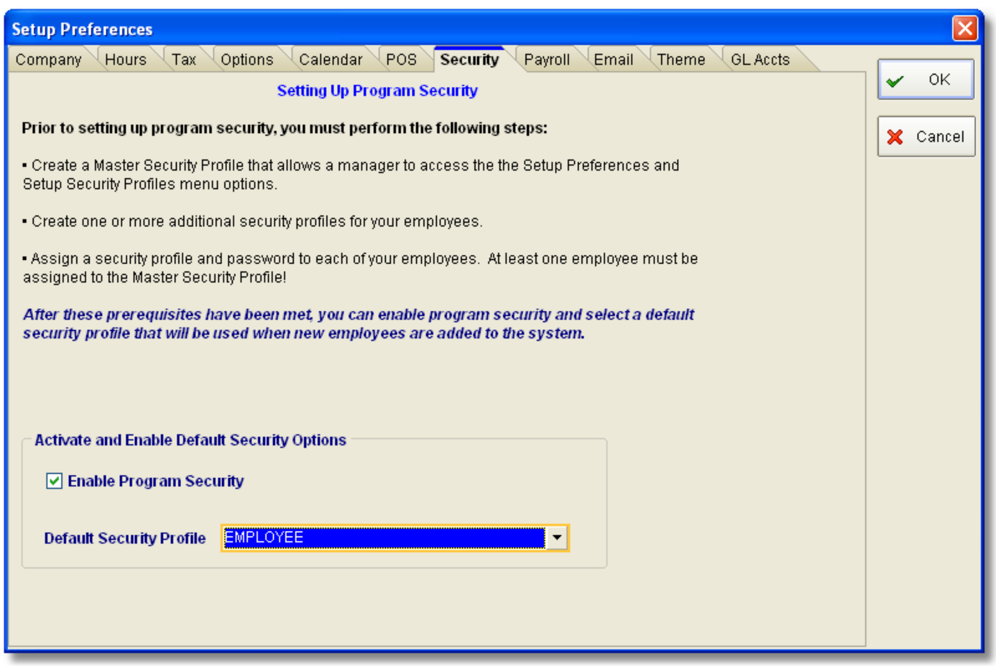
Enter the number of receipts that you would like printed for every sales transaction.

Gift Certificate Template

If you would like the system to print out a gift certificate from your Window's default printer, select the template that should be used for those gift certificates.

Enable Program Security

This is where you will enable the program security and select a "Default Security Profile" when you have setup Security Profiles and Passwords for your Employees. Click on the drop down arrow to select a Default Security Profile.



Enable Program Security

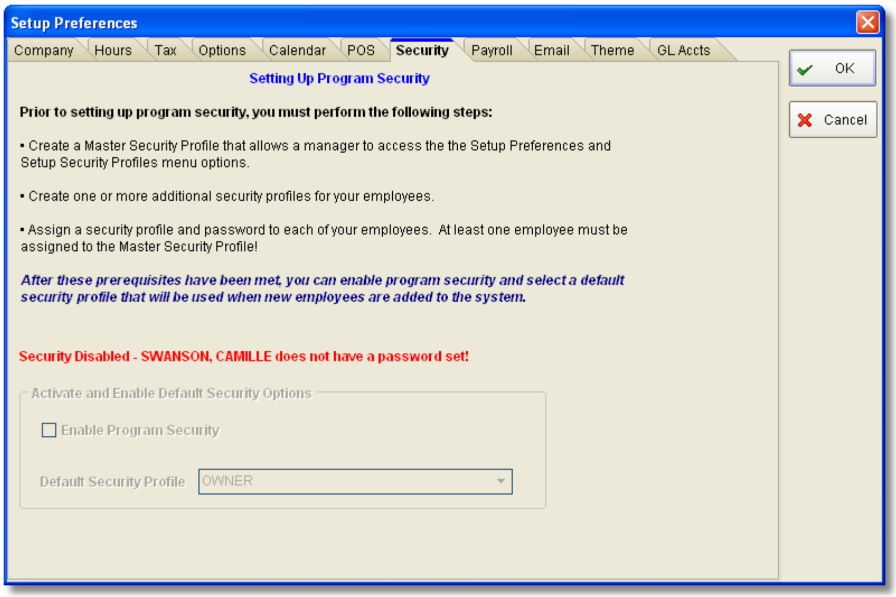
Place a check in this box if you would like the security levels to be used. If you select to enable Security, every employee will need to Log In when they would like to use the program and Log Out when they are finished. Employees will be prevented from using or even viewing certain program screens depending upon their profile setting.

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 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.

Default Security Profile

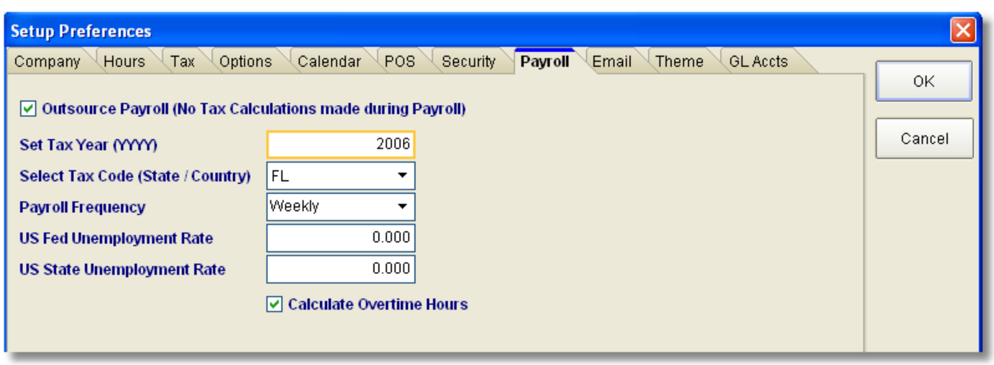
Select the profile that you would like assigned to employees when you add them to the program. You may override this at the time you are entering the employee's information, it is only the default setting.

When you do not have passwords or profiles set for any one of your employees, the Security screen will display the following screen:



Note: To enter passwords and profiles for your employees, click on "Employee" from the Menu bar and select the "Employee List". Choose to edit the employee records that do not have a password or profile set and click on the "Other" tab to enter their password and select a "Security Level".

Setup Payroll Options



Outsource Payroll (No Tax Calculations mad during Payroll)

Check this box if you use an outside vendor to administer your payroll, such as ADT. This will keep the program from performing tax calculations when you run payroll.

Tax Year / State Code / Payroll Frequency

- Set the current tax year as 4 digits (2005, 2006, etc.).
- Using the drop down button select the state your business is in.

- Using the drop down button select how often you do payroll.

Federal / State Unemployment Rates

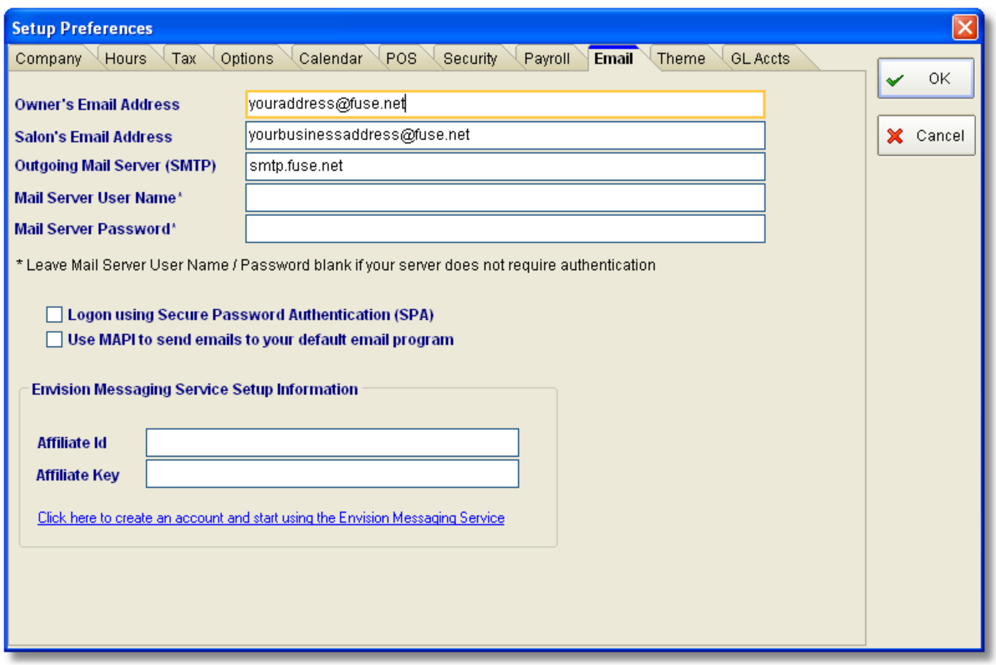
Enter both the Federal and State unemployment rates in these fields. Enter the number as a decimal. For example, 2% would be entered as .02.

Calculate Overtime Hours

Check this option if you would like the program to calculate overtime hours when calculating payroll.

Setup Email

If you would like to email directly from Envision, you will need to setup your SMTP information.



Email Server and Address

The "Outgoing Mail Server (SMTP)" field is so the program can send OUTGOING mail via your email server. It is the portion of your email address that appears after the "@". For example: MyBusiness@aol.com. The server is the "aol.com" portion of the address. If you are not sure of what this is or if the server does not work, it would be best to contact your Internet Service Provider for this information.

The "Owner's Email Address" and "Salon's Email Address" fields are used for the Owner's and Salon's full email address. For example: mybusiness@aol.com.

Email Username And PW

Enter your username and Password in these fields. This information is provided by your Internet Service Provider. Your Username is usually the portion of your email address to the left of the "@" symbol. For example in this email address "jsmith@aol.com" the username is jsmith.

Login Using SPA

Select this option if the Secure Password Authentication protocol (or SPA) is required to log in to the server. Note: When you select this option, SPA will prompt you for credentials and the User Name and Password above are not used.

Send Using MAPI

Select this option if your mail is going to be sent using a MAPI email system.

MAPI (Mail Application Programming Interface)

MAPI is a Windows API that allows Windows programs to easily send email. The email is then sent into whatever mail system is running at the user's site. For example, if you're running Outlook or Outlook Express, a Windows program could use MAPI to post an email message. The Outlook implementation of the MAPI driver would then do whatever was necessary to send the message.

Envision Messaging Service (EMS)

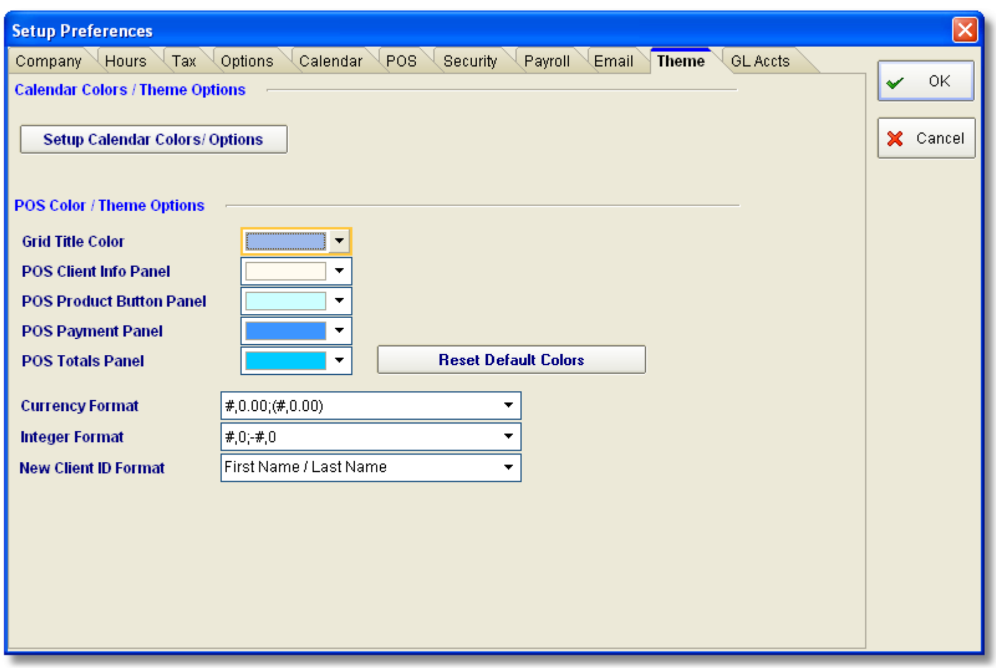
This is Envision's easy to use appointment reminder system that integrates with Envision's Appointment Calendar and offers automated Phone, SMS text messaging and emails appointment confirmations. Use text to speech, your voice or a professional voice talent to prepare you messages. EMS provides a daily report detailing which clients heard or received their messages, confirmed or rescheduled their appointments, or did not respond.

Affiliate Id / Affiliate Key

The "Affiliate Id" and "Affiliate Key" are the username and password provided after purchasing the Envision Messaging Service.

Setup Theme

This screen will allow you to change Point of Sale colors and Theme Options as well as colors and settings for the Appointment Calendar. Click on the drop down arrows to select a different color.

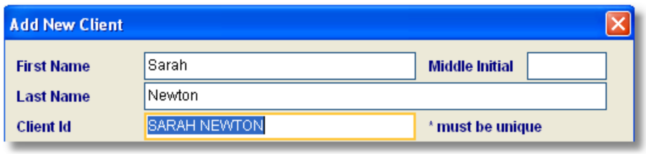


Click the "Reset Default Colors" button to restore the program's default colors.

Currency Format and Integer Format

These options are available for international companies that use different types of currency.

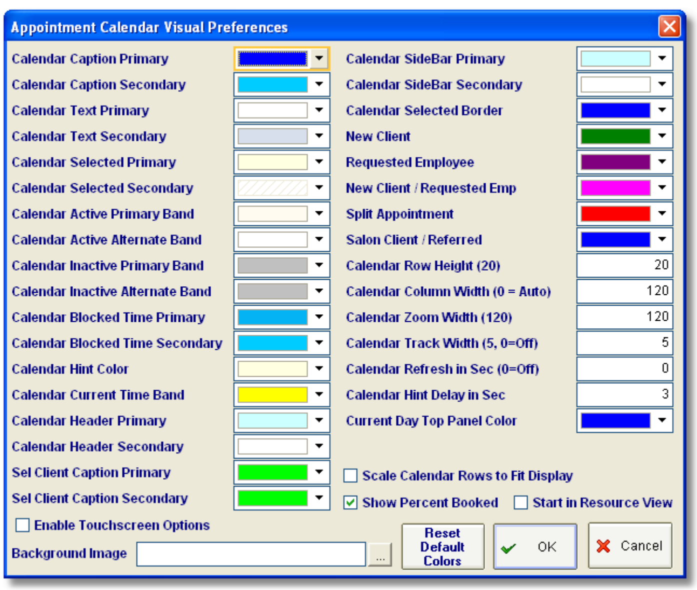
New Client ID Format



Add Client Screen

When adding a Client outside of your Client List, the Client Id can automatically be entered for you. The system is defaulted to enter the first initial and last name of the client, however this option will allow you to change the format of the Client Id that is automatically entered. We strongly recommend setting this New Client Id Format to First Name / Last Name, Last Name / First Name, or First Name (Space) Last Name. Selecting clients will be much easier with any of these Client Id formats and you will not come across a situation where you will need to enter a number in a Client Id because more than one client has the same first initial and last name.

The "Setup Calendar Colors / Options" button will open the following screen. The following screen allows you to set display properties and colors of the Appointment Calendar.



Calendar Colors

Click the drop down arrows to select a different color for each area of the Appointment Calendar. You may also use the "Theme" button in the Appointment Calendar (to the left of the "Actions" button) to change these colors while viewing the Appointment Calendar. This will help you in determining what each color setting represents.

Calendar Standard Colors

These color settings are the colors that are displayed on appointments to show the type of appointment that it is. These colors will not be displayed if these colors are determined by the resource that will be used for the selected appointment.

Calendar Width / Height / Zoom Settings

Set the "Calendar Row Height", "Calendar Column Width", "Calendar Track Width" and the "Calendar Zoom Width" (how big the calendar gets when you click the zoom button). We recommend you leave the settings at the default 70/120 respectfully.

Calendar Refresh / Hint Delay Settings

The "Calendar Refresh in Sec" setting determines how often (in seconds) the calendar will refresh itself. The "Calendar Hint Delay in Sec" determines how long (in seconds) the appointment information is displayed when you rest your mouse arrow over an appointment.

Scale Calendar Rows to Fit Display

Check this box if you would like the calendar rows to fit your display.

Show Percent Booked

Check this box if you would like to display the percent of time booked for each employee at the bottom of the Appointment Calendar.

Start in Resource View

Check this box if you would like to display appointments in the Appointment Calendar by the Resource selected instead of the Employee when you first open the Appointment Calendar. Every Resource that you have setup in Envision that has "Show on Appointment Calendar Resource View" checked, will have it's own column in the calendar.

Enable Touchscreen Options

Check this option if you would like touchscreen options to be available in the Appointment Calendar. For example, if you enable these options there is a button on appointments that will allow you to bring up the Right Click menu options.

Background Image

Click on the browse button (button with three dots) in this field to select an image located on your computer. The image will be tiled in the background of the Appointment Calendar.

Reset Default Colors

Click this button to restore the calendar's default colors .

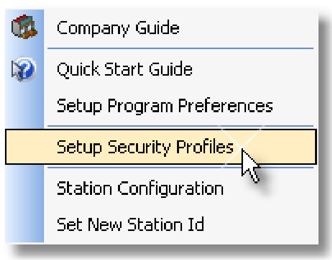
Setup Program Security

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. 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 limited access.

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.

Select "Setup Security Profiles" from the "Company" menu to add or edit Security Profiles.

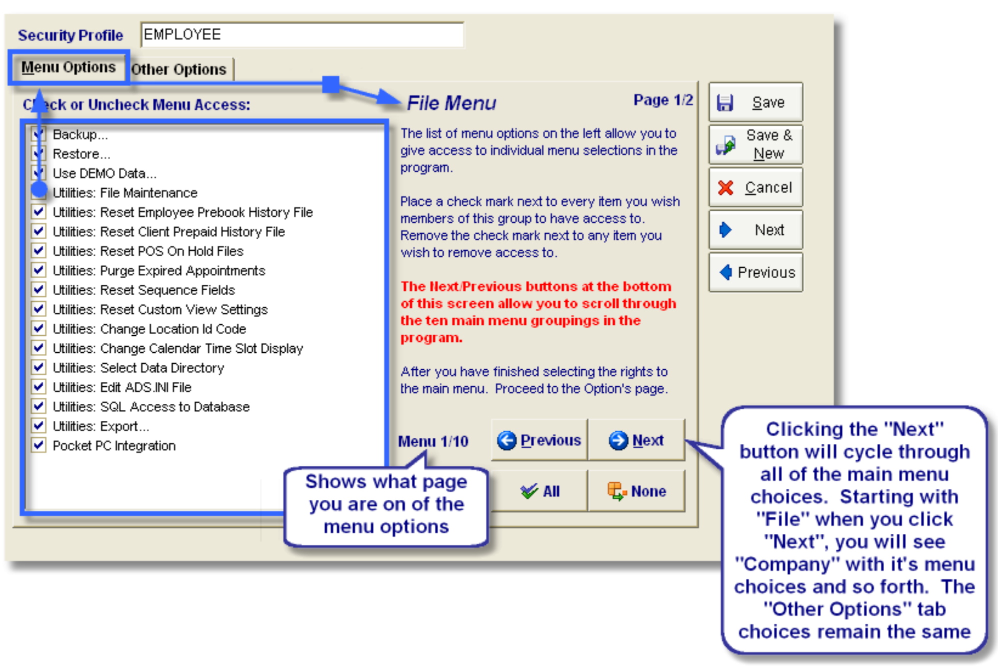


When the Security Profiles list opens, click the "New" button on the List Tool Bar to add a new profile or click the "Edit" button to edit an existing profile.

Security Profile

Enter a name in the "Security Profile" field at the top of this screen that best describes the type of employee that will be assigned this profile.

Menu Options Tab



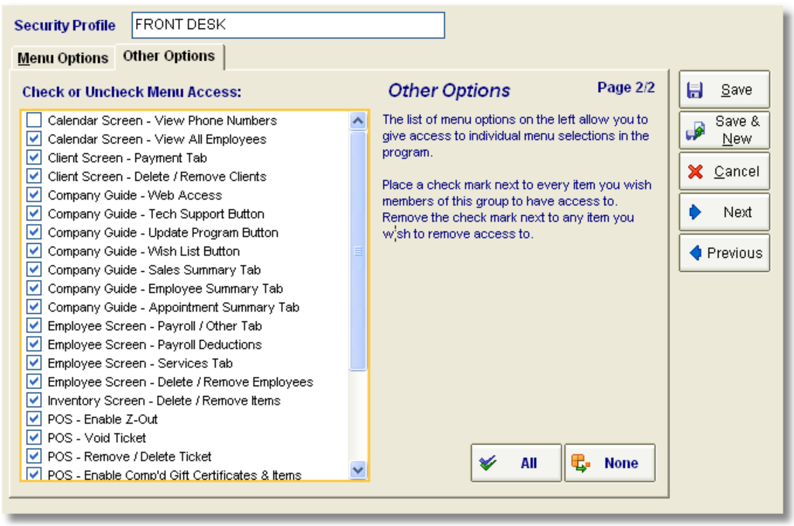
Check or Uncheck Menu Access

The list of menu options on the left allow you to give access to individual menu selections in the program. 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.

Security Profile buttons

The "Previous" and "Next" buttons will change the choices to those for the next Main Menu item or go back to the previous choice. The "All" or "None" buttons will check every box on the screen or remove all the check marks.

Other Options Tab

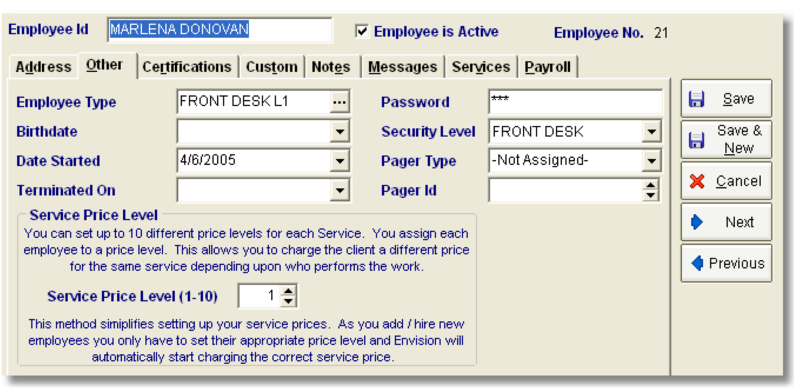


This tab contains the items that don't fall under a Main Menu choice. As you cycle through all the Main Menu items these items will stay the same.

Setup Employee Passwords and Security Levels

After creating the Security Profiles, you will need to assign passwords and security levels to every single employee in your Employee List. Employees must first be entered into your Employee List. For more information on entering employees, please refer to the "Employee Setup" section of this guide.

Click on the "Other" tab for each employee record (shown below):

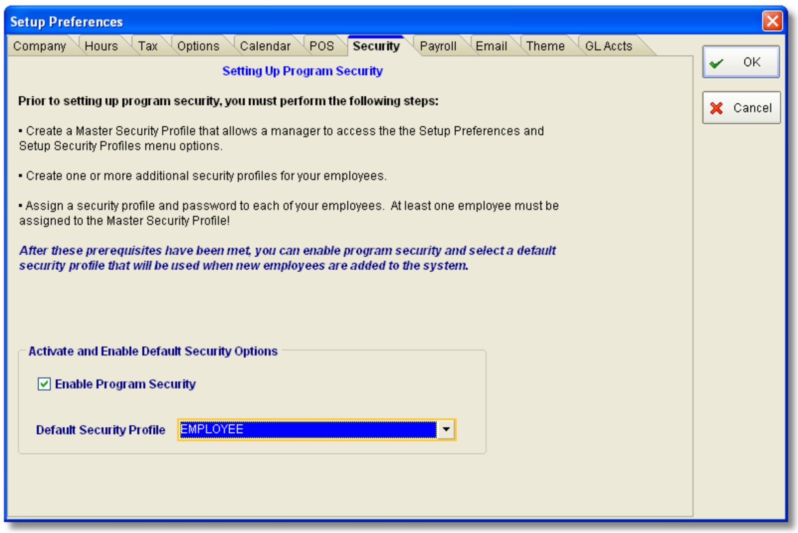


1. Make sure that a password is entered in the "Password" field.
2. Select a "Security Level" from the drop down menu.

Click the "Save" button after entering or checking this information and open the next Employee's record.

Enable Program Security

Select "Setup Program Preferences" from the "Company" Menu and click on the "Security" tab to enable the program security. Select a "Default Security Profile" that will be used when new employees are added to the system. This profile should be a profile with the least access. Click on the drop down arrow to select a security profile.

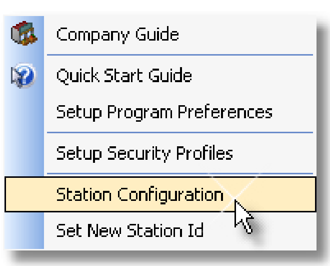


Click the "OK" button to enable the security. The next time you open the program, you will be prompted for an Employee ID and Password.

Setup Stations - Hardware

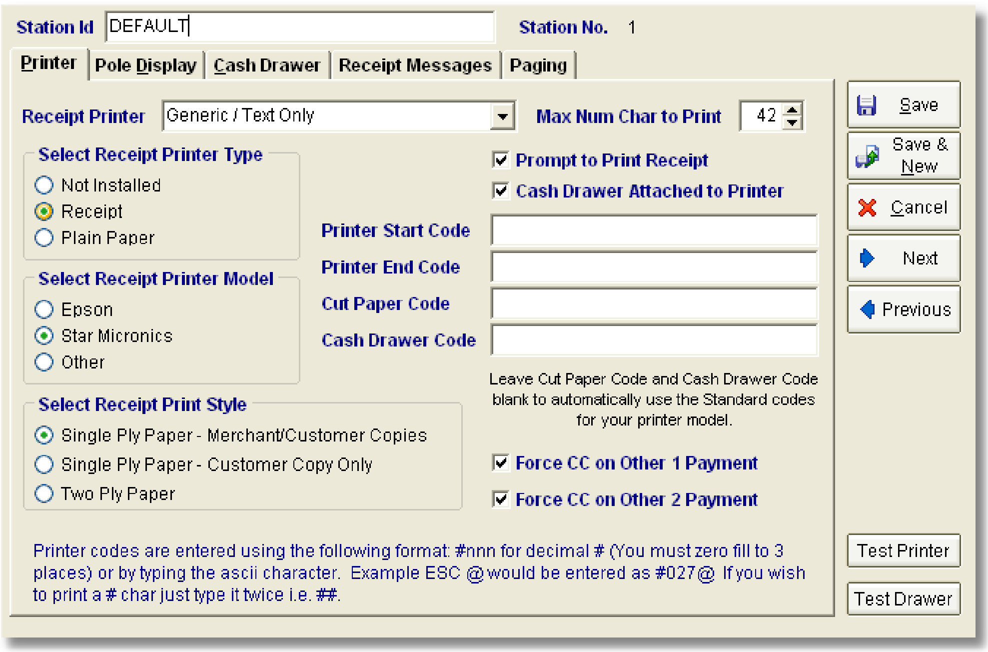
Stations are computers running Envision that are used for Point Of Sale (POS). To function as a POS, a Cash Drawer, Receipt printer, and Pole Display can be added. The individual stations need to be created with a unique identification called a "Station Id". This ensures that the data that is collected by your server will correctly identify which location conducted each piece of business. Stations can be located at one physical store or throughout many different store locations. If you are connected to the Internet or Wide Area Network (WAN), you may collect the data from different stores into one location. This makes your accounting vastly easier.

To setup your stations select "Station Configuration" on the "Company" menu as shown in the image below.



The Station List will open for you to add to this list or make changes. Click the "New" or "Edit" button on the List Tool Bar to add or edit a station.

Station Printer Setup



Station ID

The "Station ID" must be unique. The program will warn you if you try to save a station setup with a duplicate ID. Station ID's become important if you have several store locations and several stations in each store. You might like using "Front Desk" as shown below, but you can't use this for more than one store's front desk. We recommend you include the store's identity, for example: East - Front Desk, or Lake Ave Front Desk, etc.

Station Printer Setup

Click the small button in the field provided and you will see a list of printers that have been installed on your computer. The list will only show those printers that Windows recognizes as installed.

The "Receipt Printer" is the printer you selected to install on your system that is dedicated to printing customer receipts.

Receipt Printer Type

Select the type of printer you have installed (or select "Not Installed" if you haven't done this). The "Receipt" choice is for printers that use a narrow register tape paper. "Plain Paper" can be selected if you have a standard computer printer dedicated to receipt printing and it uses letter size sheets of paper.

Receipt Printer Model

Select the printer model you have installed. If you are not using an Epson or Star printer, select "Other".

Receipt Print Style

Select the Receipt Print Style for your printer. "Single Ply Paper – Merchant/Customer Copies" will print a receipt for you and a receipt for your client on single ply paper. "Single Ply Paper – Customer Copy Only" will only print a receipt for your client on single ply paper. Select "Two Ply Paper" if you are using two ply register tape paper.

Receipt Printer Characters

Select the maximum number of characters to print across the receipt for your selected printer. 40 and 42 are normal for the most common receipt printers.

Printer – Prompt to Print / Cash Drawer Connected

Check the "Prompt to Print Receipt" check box if you wish to be prompted to print a receipt at the time of sale. If a Cash Drawer is connected to your Receipt Printer click the "Cash Drawer Attached to Printer" box. This is the common connection for Cash Drawers in newer equipment. It saves using a connection on your computer. The commands to open the Cash Drawer are passed through the printer to open the drawer.

Printer Start / End Code

These code fields can be used for any commands that your receipt printer is capable of using. There are many different commands available for receipt printers that can change the style of the receipt.

Force CC On Other 1 / Other 2 Payment

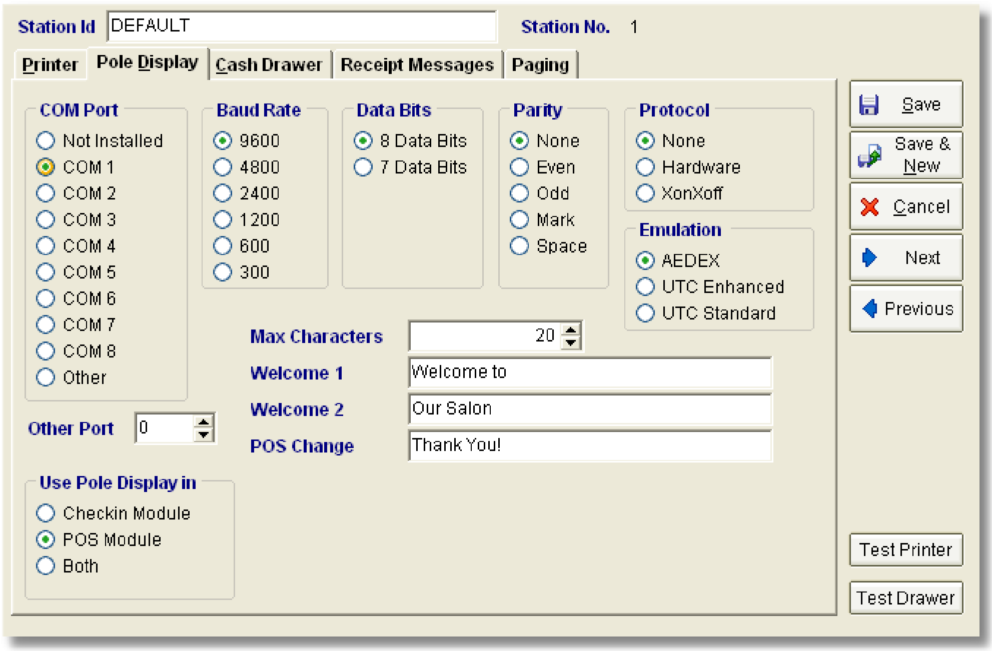
Check one or both of these boxes to print a signature line on the receipt when one of these payment methods is selected.

Test Printer / Drawer Buttons

When you have finished selecting and entering the correct information for your receipt printer and cash drawer, click these buttons to test the receipt printer from the program and to test the cash drawer if it is attached to your printer. The "Test Drawer" button can only be used for cash drawers that are connected directly to a receipt printer. If you are using a cash drawer that is not connected to your receipt printer but to your PC, you may test the drawer from the Point of Sale window.

Pole Display Setup

If you have a Pole Display attached to your station, the settings shown below must be made to ensure correct operation. Click any of the fields to get detailed information about that field.



Pole Display Connections

This seemingly formidable group of settings is necessary for connecting your pole display. If you have connected the display to the serial port on the back of your computer, you can select "COM 1" and leave the remaining settings as shown. If the pole display is not working, change to "COM 2" and try it again. Check the manual for the Pole Display you purchased, and you will find the "Baud Rate", "Data Bits", "Parity", and "Protocol" settings listed. The "Emulation" setting is available if your pole display requires a specific setting.

Pole Display Use

Select to use the Display only for Point Of Sale (POS) or only with the Check-in Module of the program. The 3rd choice is recommended, even if you don't check in your clients.

Pole Display Messages

This group of settings is where you tell the Pole Display what to show.

- The "Max Characters" setting is for how many characters your Pole Display can fit across the width of its screen. The standard is 20. If your display is different, enter whatever numbers the display's manual states.

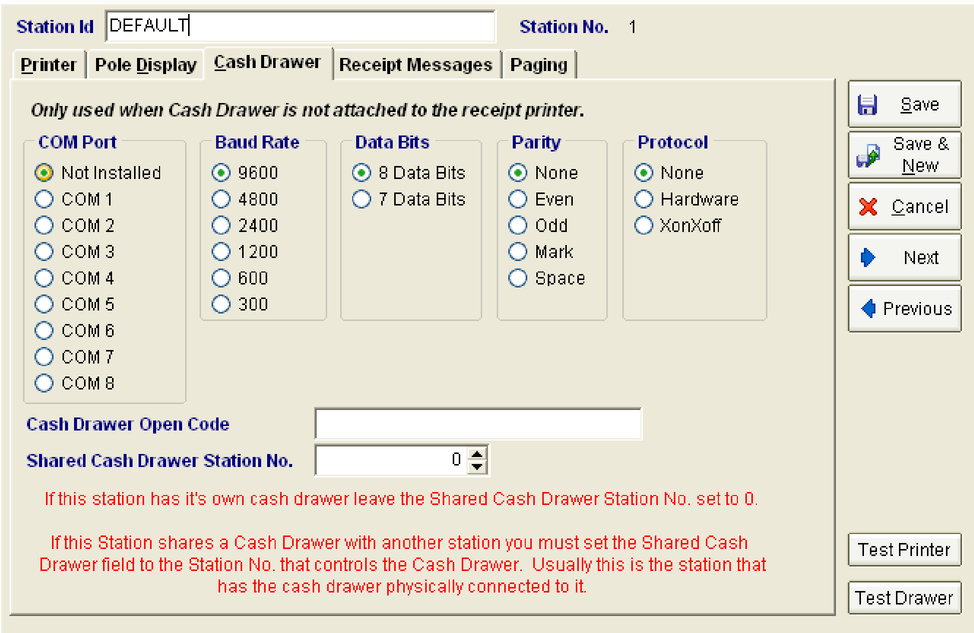
- There are 2 lines of messages available. Envision will send whatever text you enter for the following situations:

"Welcome1" and "Welcome 2": This is the static message that displays when no activity is taking place at the POS. Most pole displays have two lines for this message. When entering this message, enter the first part of the message in the "Welcome 1" field and then enter the second part of the message in the "Welcome 2" field.

"POS Change": This is the message that displays when you click the "Cash Out" button from the POS to complete the transaction.

Cash Drawer Setup

A cash drawer is normally controlled through the Receipt Printer. It is "Daisy Chain" or serial connect to the printer. If your printer does not support this feature, you will have to connect the Cash Drawer separately to the computer using the serial port. If you do this, you will need to check the settings below that apply to the particular Cash Drawer you are connecting.



Cash Drawer Connections

These settings are only to be used if your cash drawer is connected directly to your computer and NOT connected through the receipt printer. The settings can be obtained from the Drawer's manual. We suggest that you select "COM 1" and leave the "Baud Rate", "Data Bits", "Parity", and "Protocol" as shown. If the Drawer is not working, switch to "COM 2" and try again. Additional COM Ports are available, try them if necessary.

Cash Drawer Code

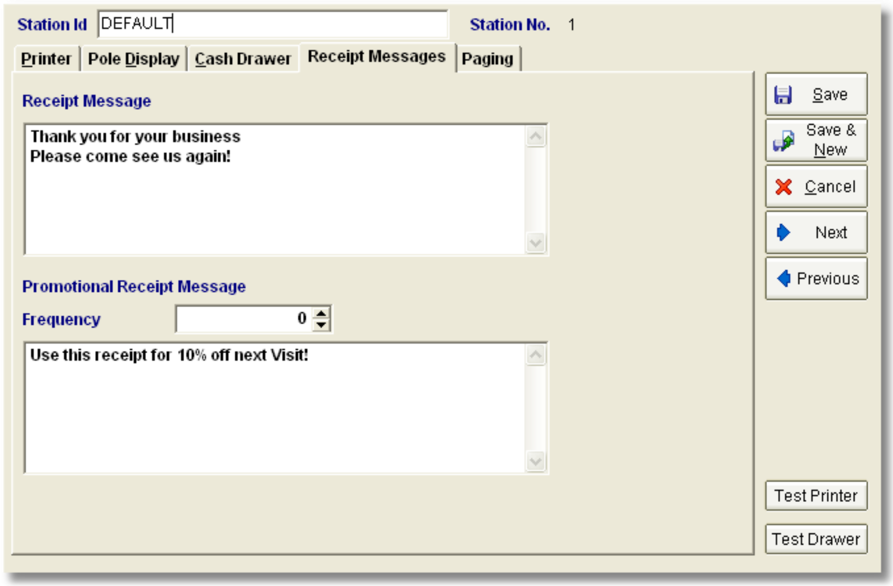
Enter the Code required to open the drawer. Enter a code here ONLY if not connected to the Receipt printer. You may obtain the code from the Drawer's manual.

Shared Cash Drawer Station Number

Enter the number of the station that you will be using for it's cash drawer. If the station you are on has a cash drawer, make sure this is set to "0".

Receipt Messages Setup

This screen allows you to enter messages that will print on the top and bottom of your receipts.



Receipt Message

Enter a personalized message that you would like printed on your receipts.

Promotional Receipt Message

The program has the ability to print a message at the bottom of the receipt. This message can be a promotion (as shown in this screen shot) or any plain text message you want. Setting the "Frequency" to the number 1 will cause the message to print on every receipt. If you wish to offer a promotion and only print it on every 5th or 25th receipt, enter 5 or 25 in this field.

Pager Configuration

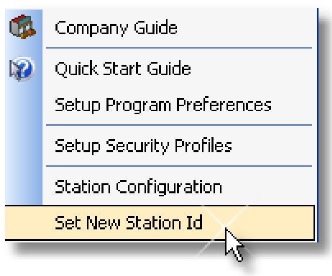
This screen allows you to configure the pager transmitter settings so that you may page a guest or service provider right from the Appointment Calendar.

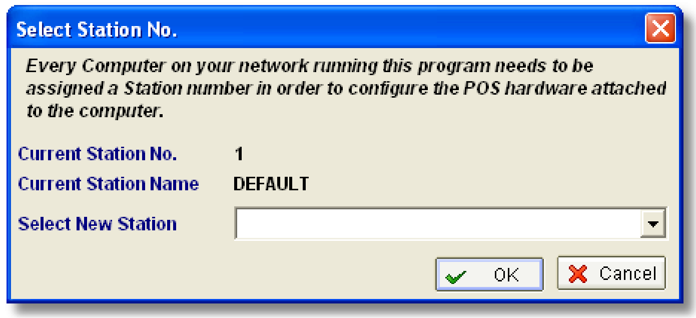
JTech Pager Transmitter Configuration

Select the "COM Port" that is used for the transmitter and select the "Paging Style".

Select Station Id

When you setup station hardware in Envision on a particular computer, you will need to select the "Set new Station Id" choice from the "Company" menu as shown in the image below.





If you have created stations in your Station Configuration list, you will have available choices on the drop down list in the "Select New Station" field.

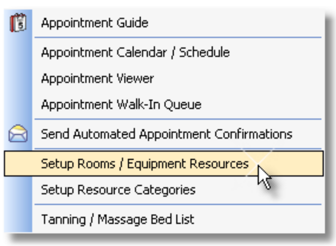
By setting up profiles for various hardware configurations on your network, you only need to select the profile that matches the hardware configuration of the computer you are working on. This greatly simplifies configuring your computer.

Setup Salon Resources

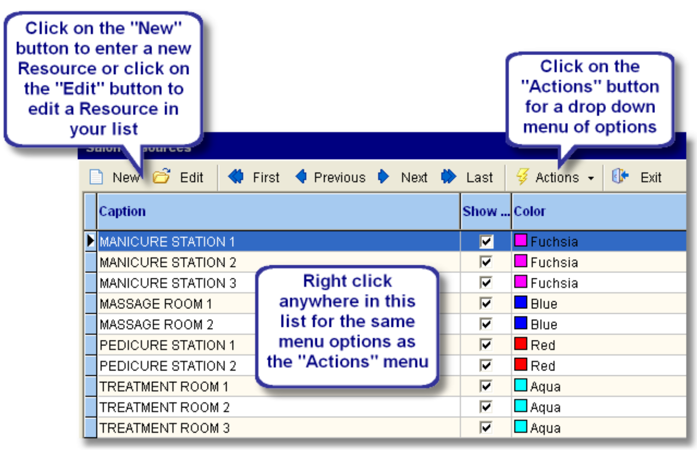
Setup Calendar Resources

Resources are rooms, stations, or equipment that need to be available for scheduling appointments. 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.

Setup of Calendar Resources can be reached by clicking on "Appointment" on the menu bar and selecting "Setup Rooms / Equipment Resources" from the drop down menu as shown in the image below. The Salon Resources list can also be reached by clicking on Setup Room / Equipment Resources under "Utilities" on the Appointment Guide window.

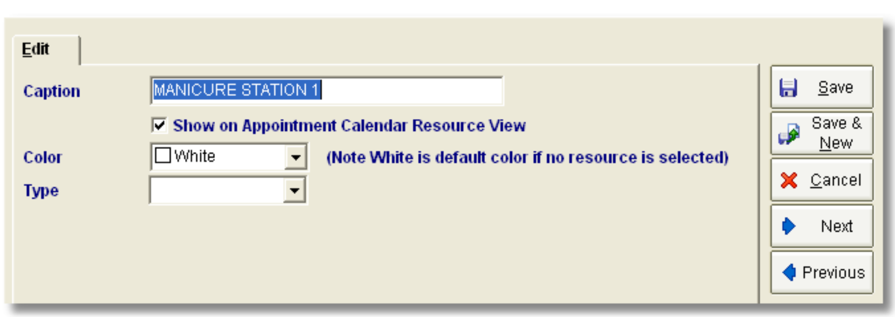


The following image is an example of what the Salon Resources list looks like:



You will need to enter every single room, station, or piece of equipment that is shared and that must be available for booking an appointment.

This screen allows you to create the Resources that will be available for appointments in the Appointment Calendar.



Resource Caption

Enter the name of the resource in this field. The name could be the type of resource that it is. If you have more than one of the same type of resource, enter a number after the name or give the resource a specific name. For example, if you have three manicure stations, name these resources Manicure Station 1, Manicure Station 2 and Manicure Station 3.

Show on Appointment Calendar Resource View

Check this box if you would like this resource to to have it's own column when you use the Resource View of the Appointment Calendar.

Resource Color

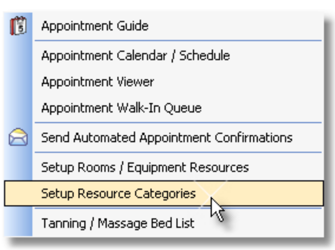
Select a color for the resource if you would like a specific color to show up to the left of the appointment. This will make it easier to determine which specific resource was selected for the appointment. You must have the "Appointment Calendar Colors Determined by Resource Selected" checked under the "Calendar" tab of the "Program Preferences" screen if you would like to use these colors in the Appointment Calendar.

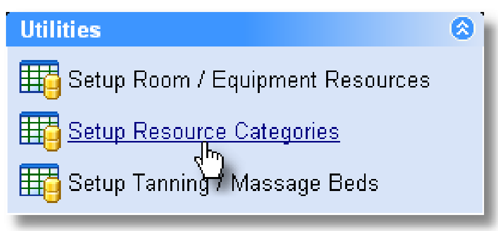
Resource Type

Select the type of resource you are adding from the drop down menu.

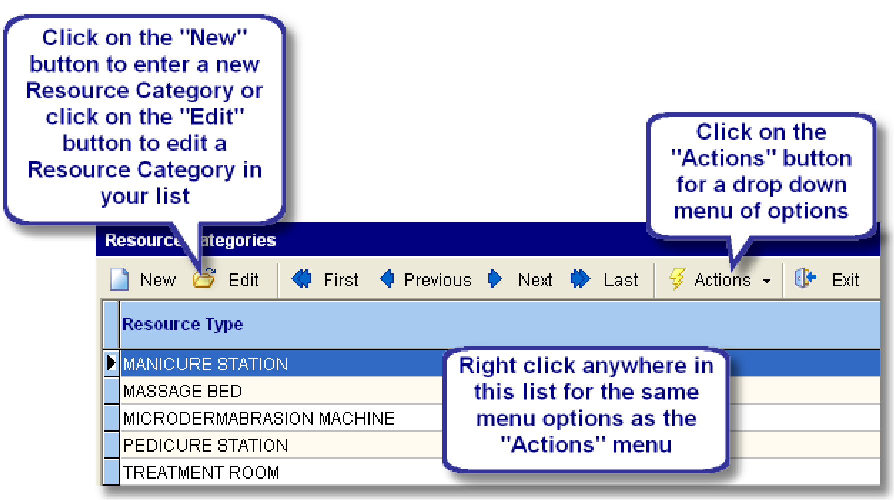
Setup Resource Categories

Setup of Resource Categories can be reached by clicking on "Appointment" on the menu bar and selecting "Setup Resource Categories" from the drop down menu as shown in the image below. The Resource Categories list can also be reached by clicking on "Setup Resource Categories" under "Utilities" on the Appointment Guide window.

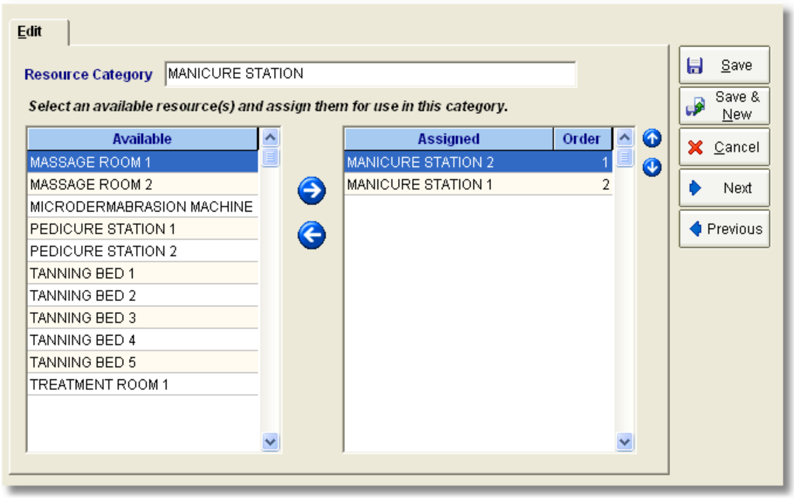




The following screen will appear. This is an example of what the Resource Categories list looks like:



This screen allows you to create Resource categories and assign resources to each category.



Resource Category

Enter the type of resource. Some examples of categories are Massage Room, Pedicure Station, etc.

After entering all categories, move all resources that can be used for the category you are entering from the "Available" list to the "Assigned" list.

Available Resources

This list will show you all of your available resources. These are the resources that you have entered in the Salon Resources List. These resources can be used for more than one Resource Category if you use any of the resources you have entered for more than one type of service. For example, if you use a Massage Room for a Facial as well, you may assign the Massage Room resource from the available list as well as your Facial stations to the Facial Room category.

Resource Category Buttons

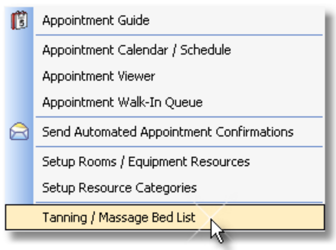
The button that points to the Assigned list is used to move the selected resource from the Available list to the Assigned list. The button that points to the Available list is used to remove resources from the Assigned list and place them back into the Available list. The up and down arrow buttons to the right of the Assigned list allow you to change the order of the assigned resources. This is the order in which the resources will be selected for appointments.

Assigned Resources

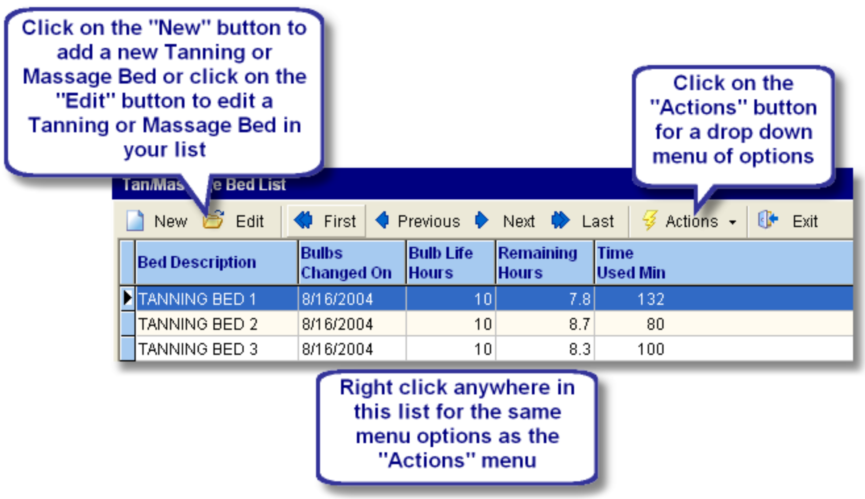
This list is a list of the resources that you have assigned to the category that you are adding or editing. These are all the resources that are available when a service is being booked that requires the selected "Category" or "Type". When you set up your services, you select a "Resource ID". The Resource ID is one of the Resource Categories.

Setup Tanning Beds

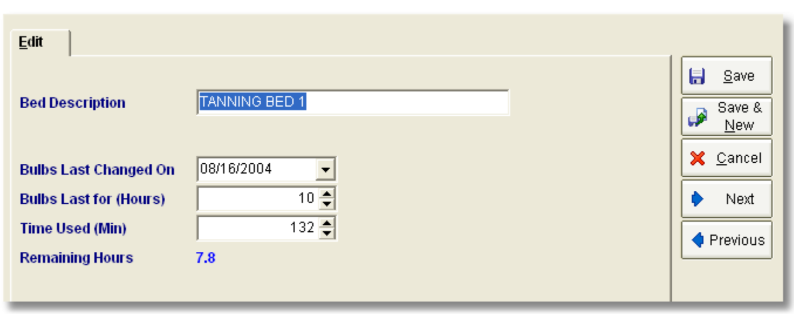
Setup of Tanning / Massage Beds can be reached by clicking "Appointment" from the menu bar and selecting "Tanning / Massage Bed List" from the drop down menu as shown in the image below. The Tanning / Massage Bed list can also be reached by clicking on "Setup Tanning / Massage Beds" under "Utilities" on the Appointment Guide window.



The following screen will appear. This is an example of what the Tan / Massage Bed list will look like:



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



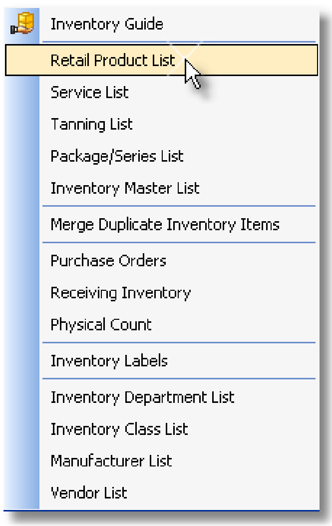
- **Bed Description:** Enter a name for this tanning bed. For example: Bed #1.
- **Bulbs Last Changed On:** Enter the date you last changed the bulbs on this bed.
- **Bulbs Last for (Hours):** Enter the recommended life in hours for the type of bulbs installed in this tanning bed.
- **Time Used (Min):** Enter the accumulated minutes on the bulbs to this date. The program will automatically add to this number every time you take payment for use of this bed.
- **Remaining Hours:** This number is calculated by the program automatically and will be used by you to schedule the maintenance on this bed.

Inventory

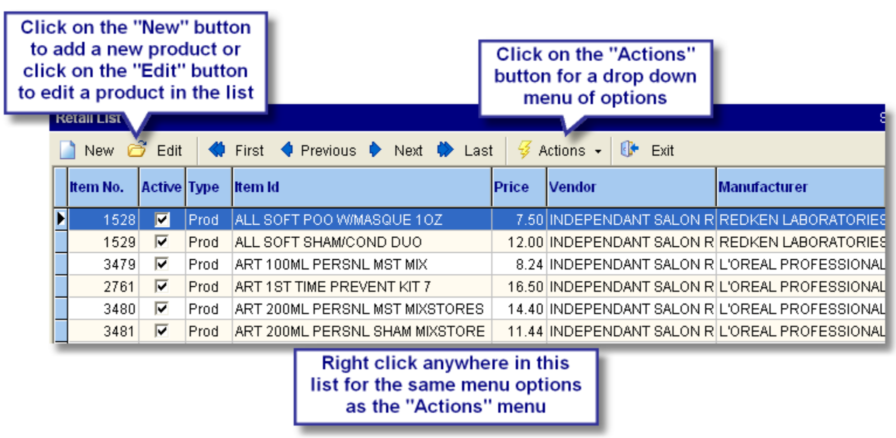
Retail Product List

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

To enter the Retail Product List, click on "Inventory" on the Menu Bar and select "Retail Product List" from the drop down menu as shown in the image below. The Retail Product List can also be reached by clicking on "Setup Retail Product File" under "General Options" on the Inventory Guide window.

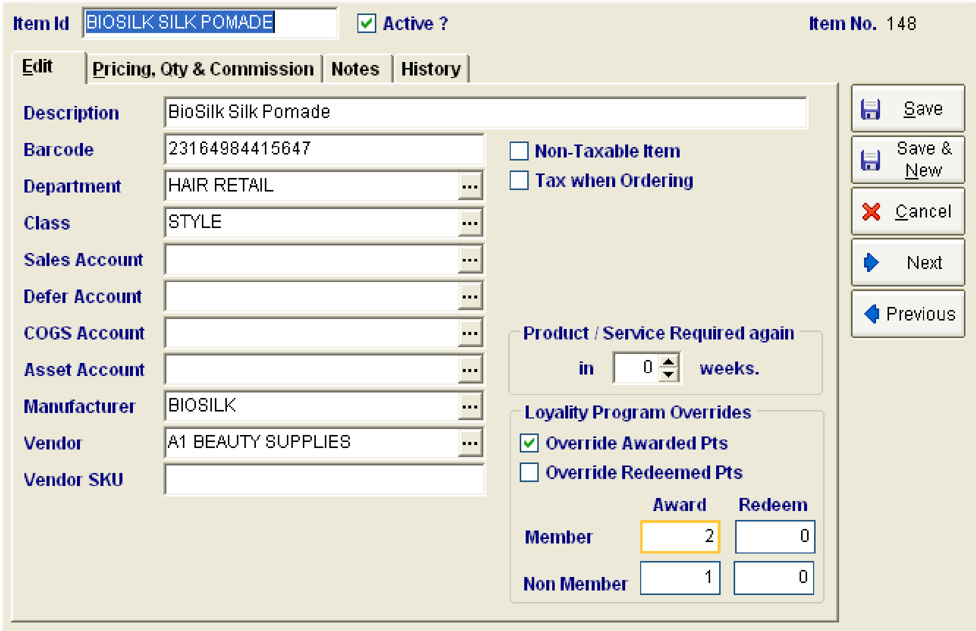


The following screenshot is an example of the Retail Product List:



This screen will appear when you select either "New" or "Edit" from the "Actions" menu button or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Retail List. Also, if you double-click on top of an item, you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.

Retail Product Edit



Item ID

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. It would also be a good idea to put an abbreviation of the name of the manufacturer at the beginning of the "Item Id" as well as the size of the product if this product comes in different sizes.

Active Item

This box should be checked if you would like this item to be available for selection.

Inventory Description

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

Barcode

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 not a barcode associated with the item, you may enter a unique number in this field or you may choose to have the program enter the Item No. of the product in this field. This is the option "Set Inventory Barcode to Item No." under the "Options" tab on the "Program Preferences" screen.

Inventory Department

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, "Hair Retail Products".

Inventory Class

This field along with "Department" can help you organize your inventory into logical groups. Some examples of Class might be, "Shampoo", "Conditioner", "Cleanser", "Moisturizer", etc. Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing.

Accounts

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 under the "Accounting" menu.

Manufacturer

Enter the name of the manufacturer of the inventory item you are adding. Use the name shown on the invoices as this will be printed on your Purchase Orders. Click on the small button in this field and click on the "Add New" button to add a manufacturer.

Vendor

Select from the Vendor List the Primary Vendor you use to purchase this item. This will set the default Vendor Name on your Purchase Order. Click on the small button in this field and click on the "Add New" button to add a vendor.

Vendor SKU

Enter the "Vendor SKU" that the primary vendor uses for this item. This item is useful for accurate Purchase Orders.

Sales Tax

Check the "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. It is not necessary to check this box if you do not have "Retail Products" checked as taxable items under the "Tax" tab on the "Program Preferences" screen.

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 as a retail item.

Product / Service Required Again

Enter the number of weeks in which this products should be purchased again. You may run a report to find out which clients are due for purchasing this product again.

Loyalty Program Overrides

- **Override Awarded Pts:** Check this box if you would like to override the awarded points set in any of the Loyalty Programs you have setup for this particular product.

- **Override Redeemed Pts:** Check this box if you would like to override the amount of points a client needs to redeem to purchase this product.

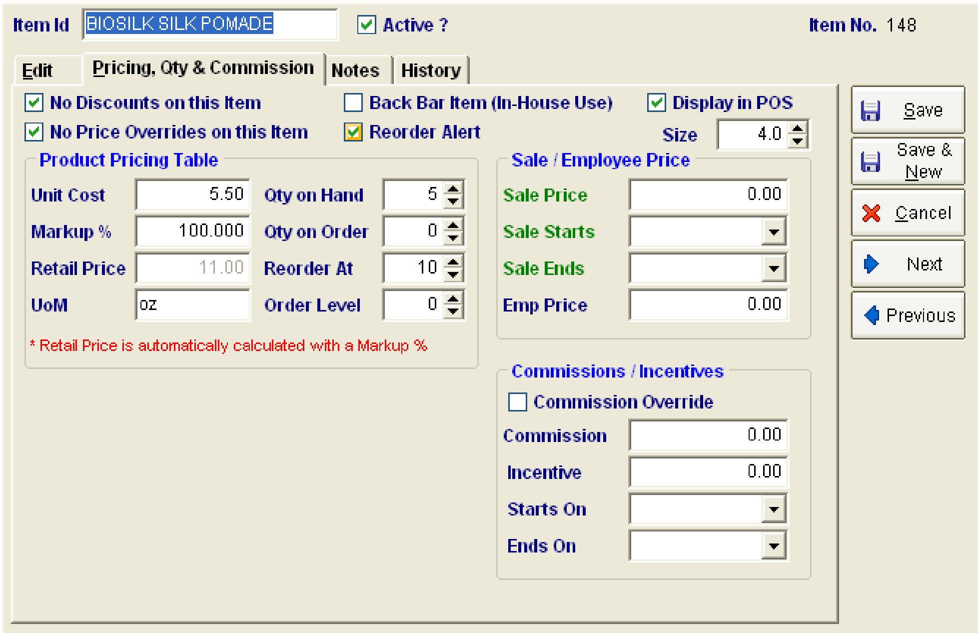
- **Member Award:** Enter the amount of points to be awarded to a client that is a Member that purchased this product.

- **Member Redeem:** Enter the amount of points that a client that is a Member would need to redeem to purchase this product.

- **Non Member Award:** Enter the amount of points to be awarded to a client that is NOT a Member that purchased this product.

- **Non Member Redeem:** Enter the amount of points that a client that is NOT a Member would need to redeem to purchase this product.

Retail Item Pricing, Qty & Commission



Product Pricing Table

The information entered into these fields refers to the Retail sale of the product as well as the ordering of the product. If you order shampoo by the case and sell it by the bottle, you would enter into these fields information about a single bottle.

Unit Cost: This is your cost per unit. If you pay $36 per case of 12, you would enter $3 for a single product.

Markup % / 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.

UoM: Enter a Unit of Measure into this field, such as "Ea" for each.

Qty on Hand: Enter the quantity you currently have in stock for this item.

Qty on Order: Enter the quantity you have on order for this item if you are currently ordering this product. If you already have the correct amount that you need, leave this number at zero and this field will be updated when you create a Purchase Order in the program.

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

Reorder At: Enter the level you wish to reach before you need to reorder this product. This is the minimum amount you would like to have on the shelf when you need to reorder this product. You may want to enter a slightly larger amount in case all the products are sold while you are waiting for an order to come in. For example, if you enter "2" as the "Reorder At" amount and your "Qty on Hand" is "1", the program can remind you to reorder this product when the quantity has been decreased to "2". While you are waiting for the Purchase Order for this product to come in, the last item is sold and you will not be receiving the order for another week. If the "Reorder At" amount had been a larger amount, you would have more products to sell while you were waiting for the Purchase Order to arrive.

Order Level: Enter the quantity of this item you normally reorder. This will be used to automatically fill in the "Ordered Qty" field when creating a Purchase Order. If this field is left at "0", the difference between the "Qty on Hand" and "Reorder At" will be ordered when your products are scanned for a Purchase Order.

No Discounts or Price Overrides

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.

Back Bar Item

Check this box if this item is never for sale to clients, but used to run your business. For example, Color Products (Professional Products), Robes, and Slippers.

Reorder Alert

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.

Display in POS

This box is defaulted as checked (yes). Uncheck it if you don't want this item to be available at the Point Of Sale (POS).

Size

Use the small up and down arrow buttons to set this number to one that corresponds with the size of this product. For example a 32 oz bottle of shampoo would have 32.0 entered here.

Sale/Employee Price

The first three fields pertain to placing this item on sale. The last field is where you set a purchase price for your employee's.

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.

Enter an amount into the "Emp Price" field if you wish to give your employees a discounted price on this item.

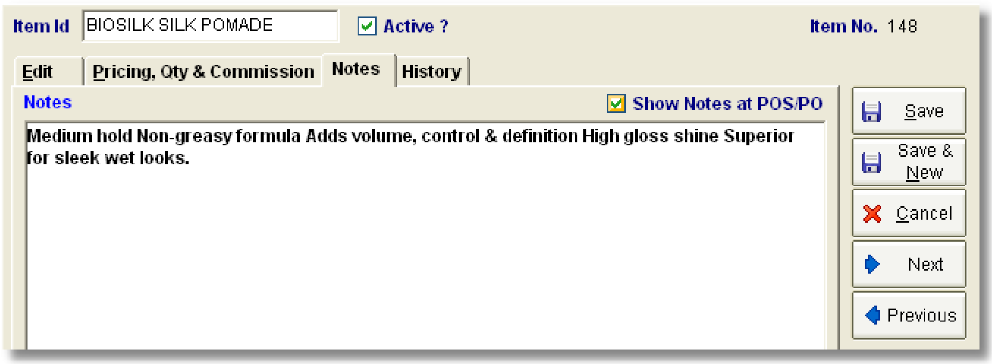
Commissions / Incentives

If you wish to pay a specific dollar amount to employees that sell this product instead of their normal commission percentage, check the "Commission Override" box and enter a dollar amount in the "Commission" field. The check box and the field act together. 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.

Retail Item Notes

If you need to remind the client or Front Desk staff of something important when this product is purchased, enter notes for this product here. You can have these notes popup at the Point of Sale if necessary.

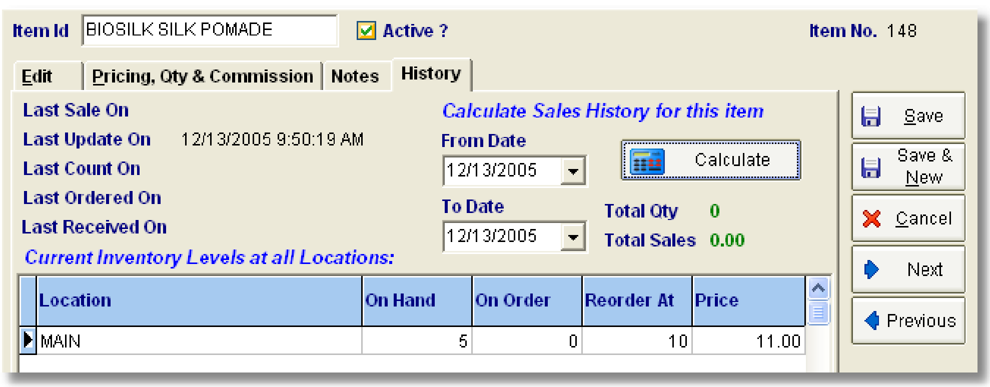


Show Notes at POS / PO

Click here if you want the Notes about this product shown on the Point Of Sale and Purchase Order screens.

Retail Item Sales History

This screen allows you to see how well this product has been sold over a given period of time. It is a very powerful sales tool. For example, if you were to run a sale on this item for a one-week period and then look at the sales history for that week and then change the date to the same week the previous year or month, you would get an instant indication if your sale was successful.



Last Sale / Update

These two dates will tell you the last time the item sold, and the "Last Update On" date will tell you the last time someone edited this product information in inventory.

Last Count / Ordered / Received

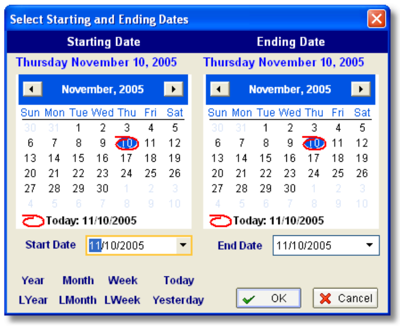
This area of the screen shows the last date the item was adjusted using the "Physical Count" screen, the last date a "Purchase Order" was entered that had this item listed, and the last date this item was checked in using the "Receiving Inventory" screen.

Sales History From Date and To Date

The dates you enter are to set the range of sales history you wish to see. You must click the "Calculate" button when you change the dates to force the program to update the information. The "Total Qty" and "Total Sales" areas show the quantity and dollar amount for the dates range you selected.

Make both dates the same to view a single day.

Note: Double clicking either date will give the Range of Dates calendar shown below. Both the Start and End dates are set from this one screen. Below the screen shot are the explanations of all the controls on the calendar.



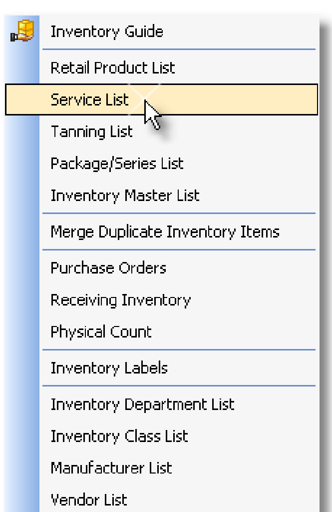
- **Year:** The current year from January 1 to December 31.
- **Month:** The current month.
- **Week:** The current week ENDING on the day selected (usually Today).
- **Today:** Just like it says, both dates will be filled in with today's date.
- **L Year:** Last year from January 1 to December 31.
- **L Month:** Last Month
- **L Week:** Last Week ENDING 1 week before Today.
- **Yesterday:** Yesterdays date, both calendars will display yesterday.

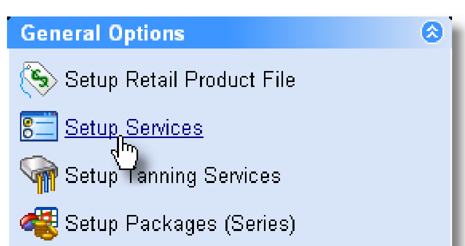
Simply select the "Starting Date" on the left calendar and the "Ending Date" on the right calendar. Then click the "OK" button and both dates are filled in. The buttons are a very fast way of selecting common ranges of dates:

Service List

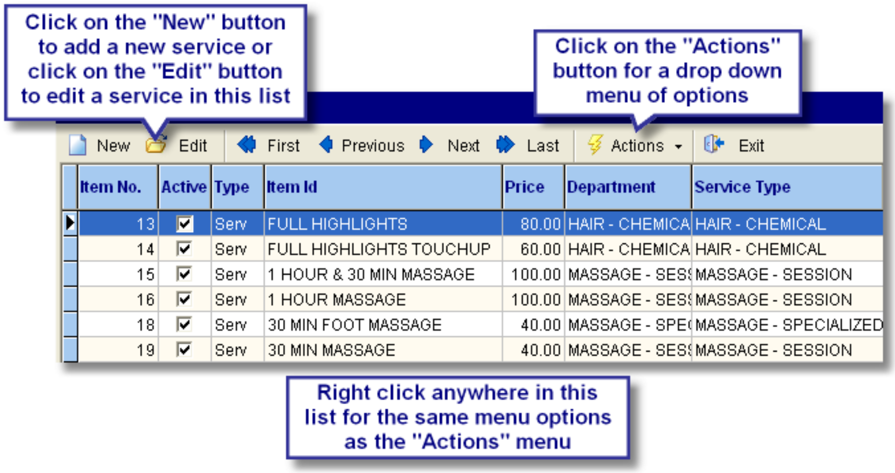
The Service List allows you to enter all the Services that your business offers.

To enter the Service List, click on "Inventory" on the Menu Bar and select "Service List" from the drop down menu as shown in the image below. The Service List can also be reached by clicking on "Setup Services" under "General Options" on the Inventory Guide window.



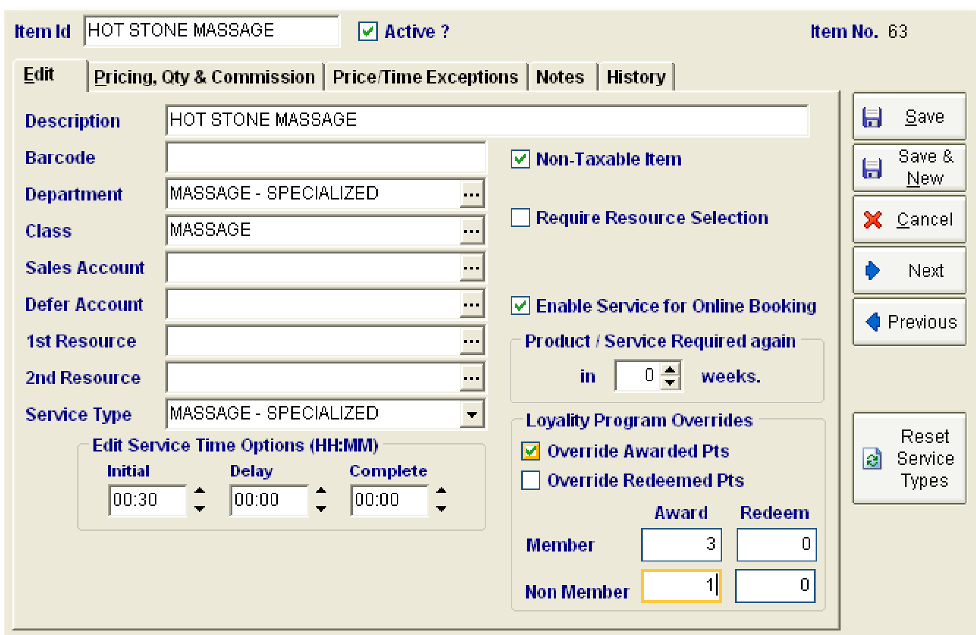


The following screenshot is an example of the Service List:



This screen will appear when you select either "New" or "Edit" from the "Actions" button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Service List. Also, if you double-click on top of an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.

Service Item Edit



Item ID

Enter the name of the service 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.

Active Item

Check this box to make sure this item is available for selection.

Inventory Descriptions

- **Description:** Enter the plain language description you wish here. The name you enter here is what will be displayed on the Inventory List and printed on Purchase Orders, receipts and reports.

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

- **Department:** 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 appears.

- **Class:** 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.

- **Sales Account:** Select from the drop down list the account this item belongs to. You can create the Accounts by selecting "Chart of Accounts" from the "Accounting" menu.

Resource Selection

Select the type of resource (equipment) that this service requires. A second resource selection is available if the service requires two types of resources. For example, for a Microdermabrasion, the treatment room and Microdermabrasion machine are required for the service.

Time to Complete Service

The three items in this area of the screen only appear when you are entering a Service item.

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: 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" time above. This is the time it takes to finish the service after the Delay.

Non-Taxable Item

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services. It is not necessary to check this box if you do not have "Service Products" checked as taxable items under the "Tax" tab on the "Program Preferences" screen.

Enable Service For Online Booking

Check this box to make this item available for Online Booking.

Require Resource Selection

Check this box if you would like the selection of a resource to be a requirement when scheduling an appointment for this service. The "Resource Id" field will be cleared and the appointment cannot be scheduled without selecting a resource first.

Required Again time

Enter the number of weeks that this service should be repeated. You may run a report to find out which clients are due for this service again.

Service Type

The "Service Type" is used by salons that work with KRS Consulting. You do not need to select a Service Type if you are not associated with KRS Consulting. This Service Type must be set for each service so that KRS Reports can be generated with accurate information about the services you have sold.

Loyalty Program Overrides

- **Override Awarded Pts:** Check this box if you would like to override the awarded points set in any of the Loyalty Programs you have setup for this particular service.

- **Override Redeemed Pts:** Check this box if you would like to override the amount of points a client needs to redeem to be rewarded this service.

- **Member Award:** Enter the amount of points to be awarded to a client that is a Member that purchased this service.

- **Member Redeem:** Enter the amount of points that a client that is a Member would need to redeem to be rewarded this service.

- **Non Member Award:** Enter the amount of points to be awarded to a client that is NOT a Member that purchased this service.

- **Non Member Redeem:** Enter the amount of points that a client that is NOT a Member would need to redeem to be rewarded this service.

Service Item Pricing, Qty & Commission

Service Pricing Table

For Service Items only, these 10 levels will be available. The purpose is to pay more for a service (for example a Hair Styling) performed by a more experienced employee. On the employee screens you may 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 every sale in the POS).

No Discounts or Price Overrides

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.

Inventory Display in POS

Check this box if you would like to display this item at the Point Of Sale (POS).

Note: If the Department this product is in does not have the "Display in POS" box checked, this box will NOT override it since the large button for the department will not be displayed. However, you may still drop down the product list on the POS screen and select this product.

Sale / Employee Price

The first three fields pertain to placing this item on sale. The last field is where you set a purchase price for your employees.

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.

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

Commissions / Costs

These 4 fields allow you to enter Overrides for the various items shown. If you wish to pay a specific dollar amount to employees that sell this product instead of their normal commission percentage, check the "Commission Override" box and enter a dollar amount in the "Commission" field. The check box and the field act together. This will override any commission percentages you may use for an employee. The "Overhead" and "Labor" fields are associated with the "Overhead Cost" and "Labor Cost" choices to the immediate left of these fields. The "New Acct Ded" field is for a dollar amount that you would like to deduct from an employee's commission when they sell this service to a new client. This is used to offset the advertising costs associated with obtaining new clients. The "Back Bar" field is used to specify a dollar amount that is used for Back Bar products when this service is performed. This will affect the Cost and Profit figures in your sales reports.

Overhead / Labor Costs

If you wish to retain a small amount of money from the employee's commission each time this item is sold, a selection is required here. Shop owners will often 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 amount you will subtract is set in the fields to the right under "Commissions/Costs". Enter a dollar amount into either or both of the "Overhead" or "Labor" fields.

- Select "Use Commission Plan Defaults" to use the selection set in your commission plans.
- 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.

Price / Time Exceptions

Use this screen to enter exceptions for the service you are entering. You may add employees to this list and enter a specific price or service time for the service. You may also enter a specific Commission Override for the employee you have selected.

Price / Time Exceptions Buttons

- **Add Employee:** Click this button to add a line to this screen so that you may add an employee to this list.
- **Remove:** Click this button to remove the selected (highlighted) employee in this list.
- **Update:** Click this button to save the changes that you have made to this list.
- **Cancel Changes:** Click this button to cancel the changes that you have made to this list.
- **Add All:** Click this button to add all of your employees to this list.
- **Remove All:** Click this button to remove all of the employees in this list.

Service Item Notes

If you need to remind the client or Front Desk staff of something important when this service is purchased, enter notes for this service here. These notes can popup at the Point of Sale and Appointment Calendar if necessary.

Show Notes at POS / PO

Check this box if you would like the notes about this service displayed on the Point Of Sale and

Purchase Order screens.

Service Item Sales History

This screen allows you to see how well this product has been sold over a given period of time. It is a very powerful sales tool. For example, if you were to run a sale on this item for a one-week period and then look at the sales history for that week and then change the date to the same week the previous year or month, you would get an instant indication if your sale was successful.

Last Sale / Update

These two dates will tell you the last time the item sold, and the "Last Update On" date will tell you the last time someone edited this product information in inventory.

Sales History From Date and To Date

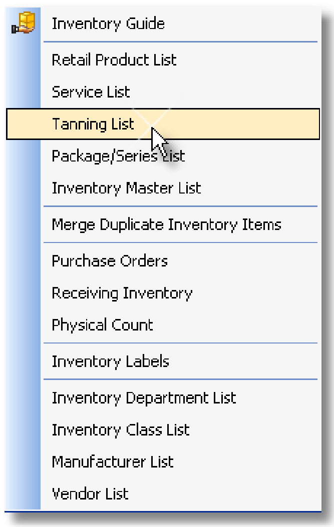
The dates you enter are to set the range of sales history you wish to see. You must click the "Calculate" button when you change the dates to force the program to update the information. The "Total Qty" and "Total Sales" areas show the quantity and dollar amount for the date range you selected.

Note: Make both dates the same to view a single day.

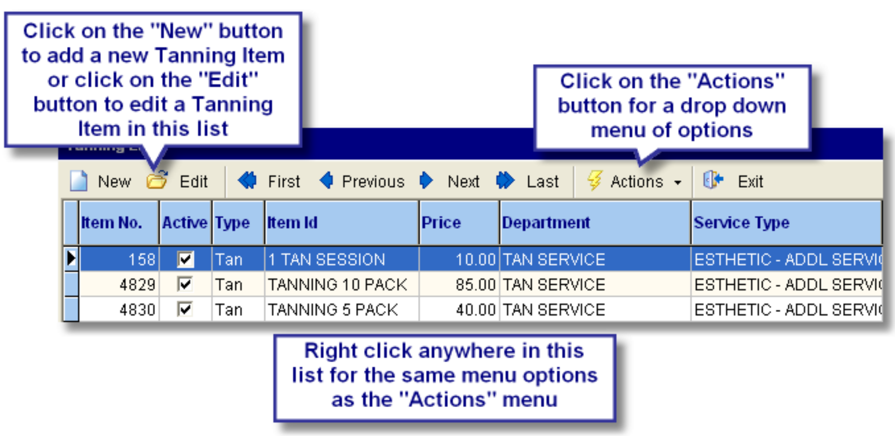
Tanning List

Use the Tanning List to enter your tanning sessions and packages.

To enter the Tanning List, click on "Inventory" from the Menu Bar and select "Tanning List" from the drop down menu as shown in the image below. The Tanning List can also be reached by clicking on "Setup Tanning Services" under "General Options" on the Inventory Guide window.

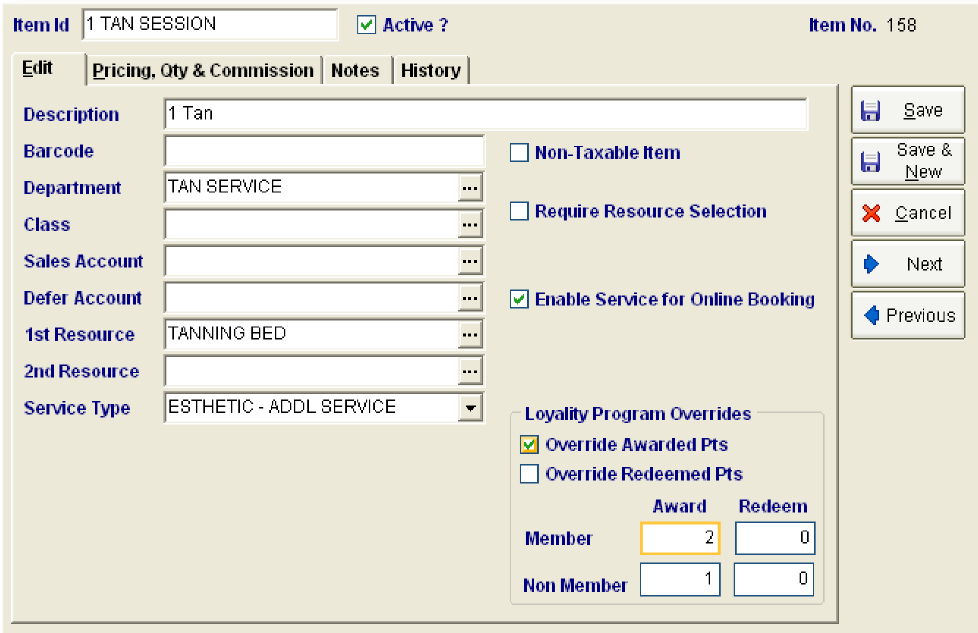


The following screenshot is an example of the Tanning List:



The following screen will appear when you select either "New" or "Edit" from the "Actions" button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Tanning List. Also, if you double-click on top of an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.

Tanning Item Edit



Item ID

Enter the name of the tanning 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.

Active Item

Check this box to make sure this item is available for selection.

Inventory Descriptions

- **Description:** Enter the plain language description you wish here. The name you enter here is what will be displayed on the Inventory List and printed on Purchase Orders, receipts and reports.

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

- **Department:** 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.

- **Class:** 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.

- **Sales Account:** Select from the drop down list the account this item belongs to. You can create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu.

Resource Selection

Select the type of resource (equipment) that this service requires. A second resource selection is available if the service requires two types of resources.

Non-Taxable Item

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services. It is not necessary to check this box if you do not have "Service Products" checked as taxable items under the "Tax" tab on the "Program Preferences" screen.

Require Resource Selection

Check this box if you would like the selection of a resource to be a requirement when scheduling an appointment for this item. The "Resource Id" field will be cleared and the appointment cannot be scheduled without selecting a resource first.

Enable Service For Online Booking

Check this box to make this item available for Online Booking.

Loyalty Program Overrides

- **Override Awarded Pts:** Check this box if you would like to override the awarded points set in any of the Loyalty Programs you have setup for this particular tanning item.

- **Override Redeemed Pts:** Check this box if you would like to override the amount of points a client needs to redeem to be rewarded this tanning item.

- **Member Award:** Enter the amount of points to be awarded to a client that is a Member that purchased this tanning item.

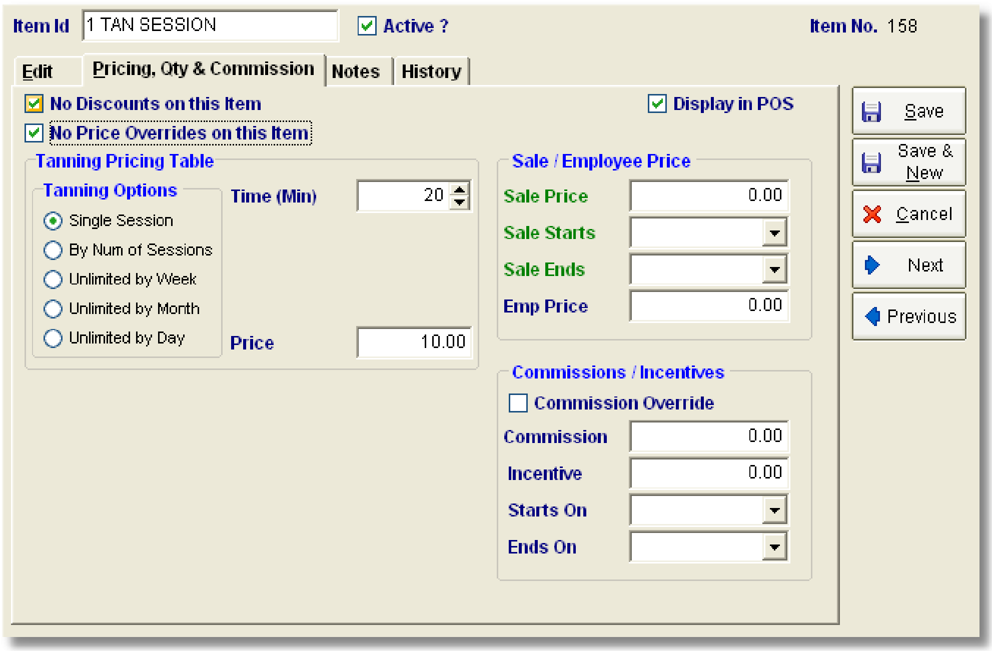
- **Member Redeem:** Enter the amount of points that a client that is a Member would need to redeem to be rewarded this tanning item.

- **Non Member Award:** Enter the amount of points to be awarded to a client that is NOT a Member that purchased this tanning item.

- **Non Member Redeem** Enter the amount of points that a client that is NOT a Member would need to redeem to be rewarded this tanning item.

Tanning Item Pricing, Qty & Commission

This screen is very powerful. Here you will setup the tanning session or package, the price of the session or package, commission overrides, discount options, as well as sale and employee prices.



Tanning Pricing Table

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. The following image 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" field appears to the right and you must select the number of sessions that the price will apply to.
- **Unlimited by Week:** When this box is checked, the "No. Weeks" field appears to the right and you may 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 are able to select how many months of unlimited tanning the client gets for the price you will be entering.
- **Unlimited by Day:** Check this box and the "No. Days" field appears to the right allowing you to select how many days of unlimited tanning the client gets for the price you will be entering.

Use the small arrow buttons to increase or decrease the count of Minutes / Sessions / Weeks /

Months / Days.

No Discounts or Price Overrides

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.

Display in POS

This box is defaulted as checked (yes). Uncheck it if you don't want this item to be available at the Point Of Sale (POS).

Sale / Employee Price

The first three fields pertain to placing this item on sale. The last field is where you set a purchase price for your employee's.

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.

Enter an amount into the "Emp Price" field if you wish to give your employees a discounted price on this item.

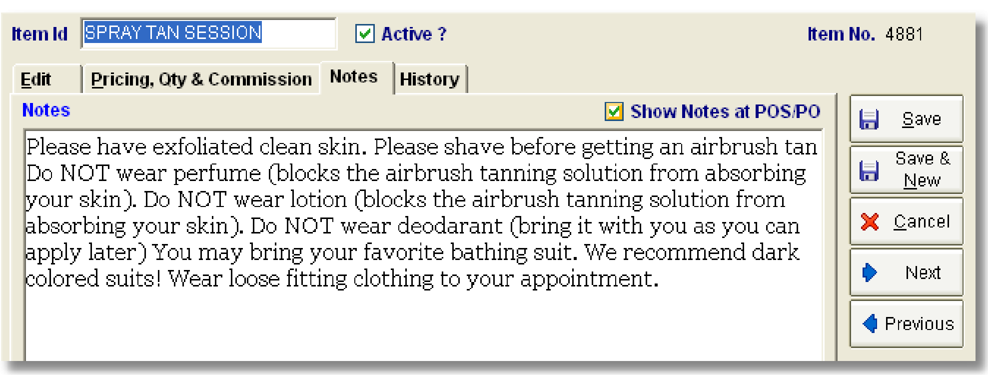
Commissions / Incentives

If you wish to pay a specific dollar amount to employees that sell this product instead of their normal commission percentage, check the "Commission Override" box and enter a dollar amount in the "Commission" field. The check box and the field act together. 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.

Tanning Item Notes

If you need to remind the client or Front Desk staff of something important when this tanning item is purchased, enter notes for this Tanning Item here. These notes can popup at the Point of Sale and Appointment Calendar if necessary.



Show Notes at POS / PO

Click here if you want the Notes about this tanning item displayed on the Point Of Sale and Purchase Order screens.

Tanning Item Sales History

This screen allows you to see how well this item has been sold over a given period of time. It is a very powerful sales tool. For example, if you were to run a sale on this item for a one-week period and then look at the sales history for that week and then change the date to the same week the previous year or month, you would get an instant indication if your sale was successful.

Last Sale / Update

These two dates will tell you the last time the item sold, and the "Last Update On" date will tell you the last time someone edited this product information in inventory.

Sales History Starting and Ending Dates

The dates you enter here are to set the range of sales history you wish to see. You must click the "Calculate" button when you change the dates to force the program to update the information. The "Total Qty" and "Total Sales" areas show the quantity and dollar amount for the date range you selected.

Note: Make both dates the same to view a single day.

Package List

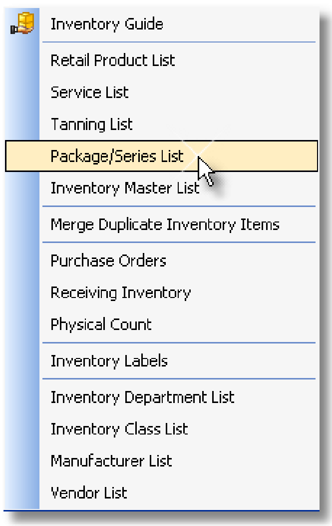
A Package can contain either physical products, Services, or Tanning. The purpose is to combine items and sell them for a discounted price.

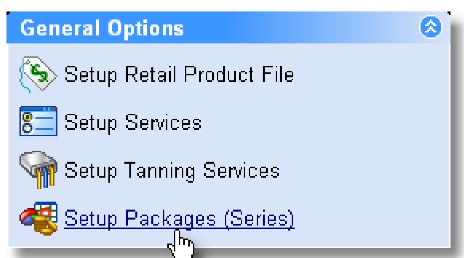
Here are some examples or each:

- **Retail Items:** You place Styling Gel, a styling comb, Shampoo, and a Conditioner together into a weekly special bag.

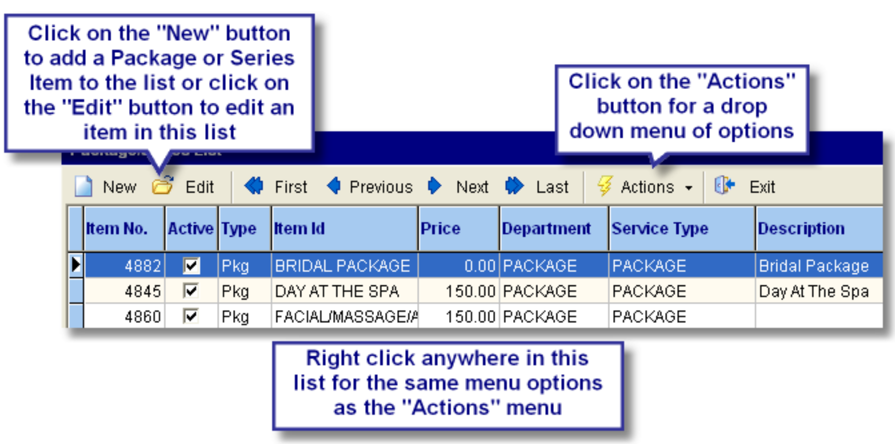
- **Service Items:** You offer a package of 12 Hair Cut / Blow Dries for a prepaid price that is discounted from the individual prices. Envision tracks the customers use of this package.

To open the Package List, click on "Inventory" from the menu bar and select "Package/Series List" from the drop down menu as shown in the image below. The Package List can also be reached by clicking on "Setup Packages (Series)" under "General Options" on the Inventory Guide window.



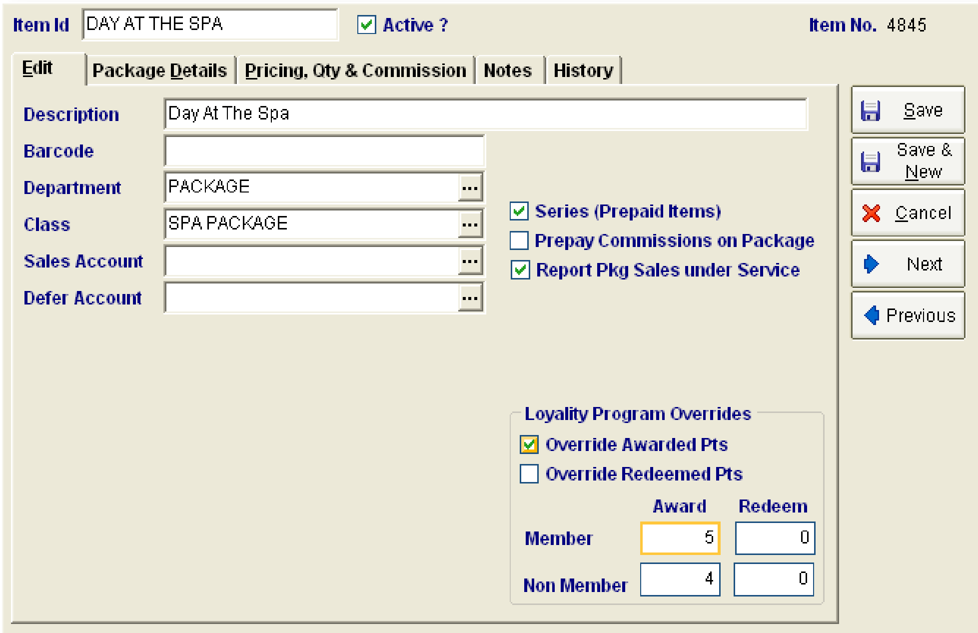


The following screenshot is an example of the Package/Series List:



The following screen will appear when you select either "New" or "Edit" from the "Actions" button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the package list. Also, if you double-click on top of an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.

Package Item Edit



Item ID

Enter the name of the package 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.

Active Item

Check this box to make sure this item is available for selection.

Inventory Descriptions

- **Description:** Enter the plain language description you wish here. The name you enter here is what will be displayed on the Inventory List and printed on Purchase Orders, receipts and reports.

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

- **Department:** 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.

- **Class:** 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.

- **Sales Account:** Select from the drop down list the account this item belongs to. You can create the Accounts by selecting "Chart Of Accounts" from the "Accounting" menu.

Series (Prepaid Packages Only)

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

By checking this box you are telling the program this package will be used up when the client checks out at the Point Of Sale (POS) the number of times equal to the "Qty" you set on the "Package Details" screen. This also allows you to track the usage of the items the client has prepaid for. For example, you wish to create a prepaid package of 10 Swedish Massages. You would check this box and on the "Package Details" screen select the inventory item Swedish Massage. Then enter a quantity ("Qty") of 10. When a client gets a Swedish Massage and checks out at the 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 complete the sale. The package count of 10 is assigned to this customer and they are charged for the total package (prepaid). You will then need to create a separate sales transaction for the Swedish Massage they used that day. When their Client Id is selected along with the Swedish Massage, the Extended Price of the service will be "$0.00" because they paid for the service when they purchased the package in the first sales transaction. The count on their prepaid Swedish Massages will be reduced to 9. The next time they come in for this service, and they are checked out in the Point of Sale they will not be 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 in the POS to sell a Package.

Prepay Commissions on Packages

Check this option to prepay commissions when this package is sold. The employee selected when the package is sold in the Point of Sale will receive service commission on the price of the package.

Report PKG Sales Under Service

Check this box if you would like to report your Packages as a Service Type item.

Loyalty Program Overrides

- **Override Awarded Pts:** Check this box if you would like to override the awarded points set in any of the Loyalty Programs you have setup for this particular package / prepaid item.

- **Override Redeemed Pts:** Check this box if you would like to override the amount of points a client needs to redeem to be rewarded this package / prepaid item.

- **Member Award:** Enter the amount of points to be awarded to a client that is a Member that purchased this package / prepaid item.

- **Member Redeem:** Enter the amount of points that a client that is a Member would need to redeem to be rewarded this package / prepaid item.

- **Non Member Award:** Enter the amount of points to be awarded to a client that is NOT a Member that purchased this package / prepaid item.

- **Non Member Redeem:** Enter the amount of points that a client that is NOT a Member would need to redeem to be rewarded this tanning item.

Package Details

This screen allows you to setup "Packages" of items that sell as a single inventory item. This is very useful if you wish to setup an item for a sales campaign, or bundle together items that have a single purpose, for example, a hair treatment package of shampoo, conditioner, and treatment. Often used to package items that your clients frequently request. You can package Products, Services, or Tanning. This allows you to sell prepaid items so you have the cash in hand, and provides an incentive for the client by saving them some money.

Package Details Item and Quantity

Each time you click the "Add Item" button a new row is created in this area of the screen. All the items that make up the "Package" you are putting together can be selected 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.

Package Listing Information

The "Description" and "Retail" fields are filled in when you select the item. The "Extended" field will show the price adjusted according to the "Package" price and the "Qty" you entered. For example, if you are placing 3 styling combs into this package with a retail price or $2.50 each, and you set the "Package" price to $1.50, the "Extended" price will display 3 X $1.50 or $4.50.

Package Price

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

Package Detail Buttons

When you first open this screen a row is created for a new item. After that item is entered, if you want to add more items, you may click the "Add Item" button. You can click the "Remove Item" button to delete the item you have highlighted on the list.

Price, % Disc and Recalc Button

These 2 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 this button the program will automatically calculate the percent of discount, individual item "Package" prices, the "Retail Price", and the "% Discount" amounts. This greatly simplifies the task of pricing packages. If you choose to enter a "% Disc" instead of a flat package "Price", the same automatic events will occur.

Package Pricing Amounts

"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.

Package Item Pricing, Qty & Commission

This screen will allow you to set discount options, package expiration, and commission overrides as well as sale and employee prices. You can also uncheck "Series (Prepaid Items)" if you do not want the items in the package to be prepaid. This option is checked as a default setting for packages.

Package Pricing Amounts

"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.

Package Expires After

Select "Days", "Weeks", or "Months" from the drop down arrow for the amount you enter in the field to left if you would like to set an expiration period for the use of the package.

Sale / Employee Price

The first three fields pertain to placing this item on sale. The last field is where you set a purchase price for your employee's.

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 it's normal price.

Enter an amount into the "Emp Price" field if you wish to give your employees a discounted price on this item.

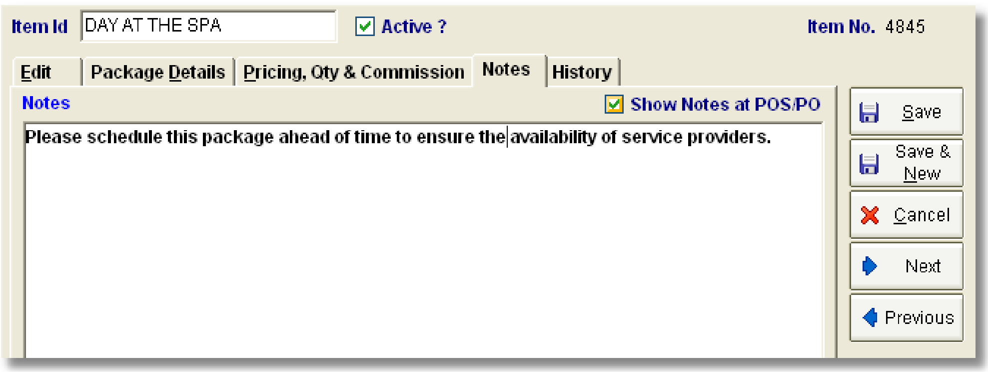
Commissions / Incentives

If you wish to pay a specific dollar amount to employees that sell this product instead of their normal commission percentage, check the "Commission Override" box and enter a dollar amount in the "Commission" field. The check box and the field act together. 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.

Package Item Notes

Enter notes for this Package if necessary.



Show Notes at POS / PO

Click here if you want the Notes about this package displayed on the Point Of Sale and Purchase Order screens.

Package Item Sales History

This screen allows you to see how well this product has been sold over a given period of time. It is a very powerful sales tool. For example, if you were to run a sale on this item for a one-week period and then look at the sales history for that week and then change the date to the same week the previous year or month, you would get an instant indication if your sale was successful.

Last Sale / Update

These two dates will tell you the last time the item sold, and the "Last Update On" will tell you the last time someone edited this product information in inventory.

Sales History Starting and Ending Dates

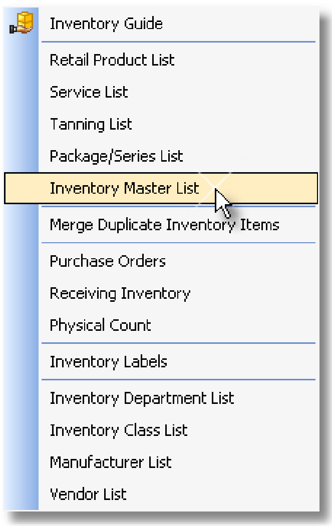
The dates you enter here are to set the range of sales history you wish to see. You must click the "Calculate" button when you change the dates to force the program to update the information. The "Total Qty" and "Total Sales" areas show the quantity and dollar amount for the date range you selected.

Note: Make both dates the same to view a single day.

Inventory Master List

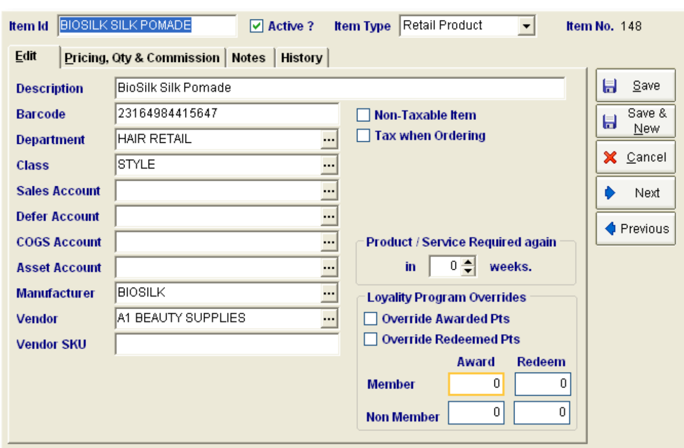
The Inventory Master List is a list that will show all Retail Items, Service Items, Tanning Items and Packages. Use the buttons on the List Tool Bar to add, edit, and skip through the records in this list. The Actions menu will allow you to add, edit, delete, and duplicate items. The Actions menu is the same as the actions menu in all other inventory lists, however in this list you may choose to display only one type of inventory items.

To enter the Inventory Master List, click on "Inventory" on the Menu Bar and select "Inventory Master List" as shown in the image below. You may also use the "Inventory" button on the Tool Bar to open the Inventory Master List.



Retail Product Edit

The following screen will appear when you select either "New" or "Edit" from the Actions button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Inventory List. Also, if you double-click an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.



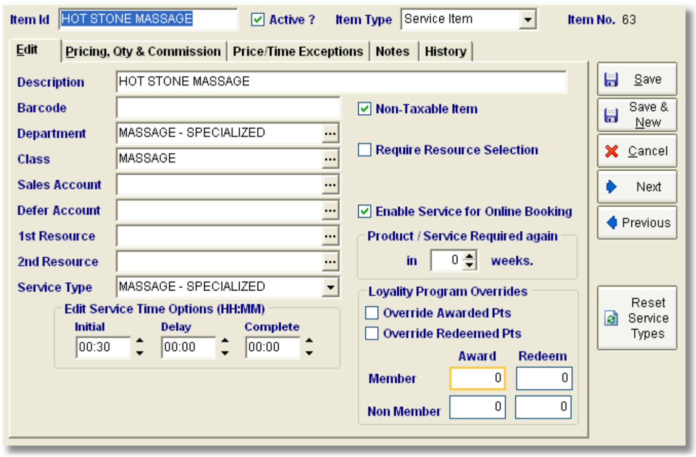
The fields on these screens are exactly the same as the retail screens in the Retail Product List. The only difference is the Inventory Item Type selection.

Inventory Item Type

Select the type of item from the drop down menu. The information on each tab will change depending on the item type that you select.

Service Item Edit

The following screen will appear when you select either "New" or "Edit" from the Actions button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Inventory List. Also, if you double-click an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.



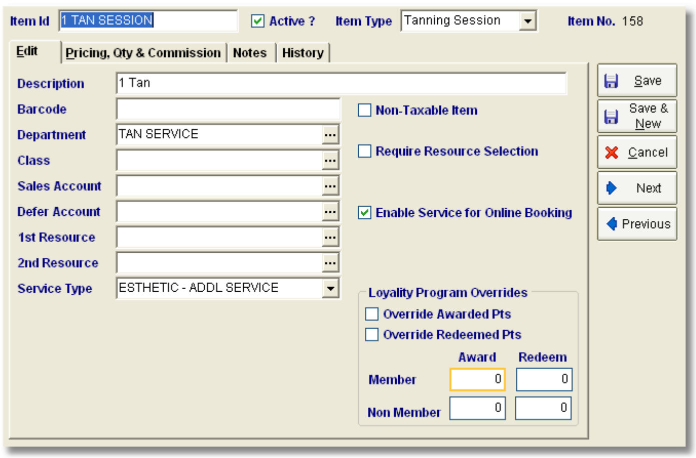
The fields on these screens are exactly the same as the Service screens in the Service List. The only difference is the Inventory Item Type.

Inventory Item Type

Select the type of item from the drop down menu. The information on each tab will change depending on the item type that you select.

Tanning Session Edit

The following screen will appear when you select either "New" or "Edit" from the Actions button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Inventory List. Also, if you double-click an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.



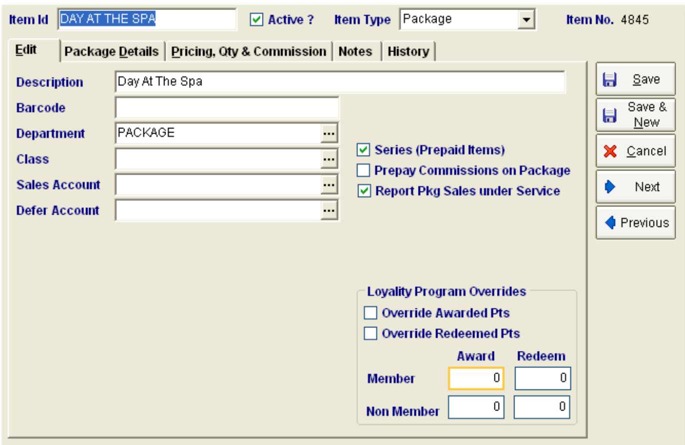
The fields on these screens are exactly the same as the Tanning screens in the Tanning List. The only difference is the Inventory Item Type.

Inventory Item Type

Select the type of item from the drop down menu. The information on each tab will change depending on the item type that you select.

Package Edit

The following screen will appear when you select either "New" or "Edit" from the Actions button menu or you may click the "New" or "Edit" buttons on the List Tool Bar at the top of the Inventory List. Also, if you double-click an item you will be brought to this screen to edit that item. When entering a new item, you will fill out all the information on this screen and then click the other tabs to enter more information.



The fields on these screens are exactly the same as the Package screens in the Package / Series List. The only difference is the Inventory Item Type.

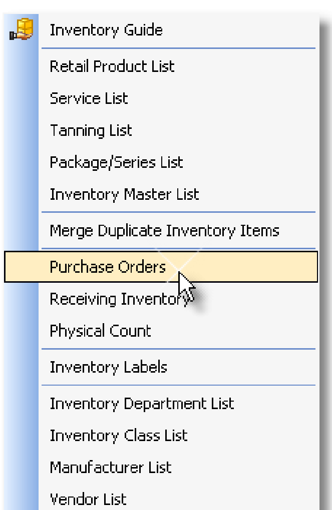
Inventory Item Type

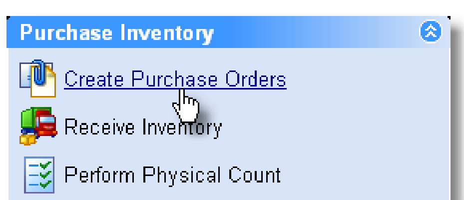
Select the type of item from the drop down menu. The information on each tab will change depending on the item type that you select.

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.

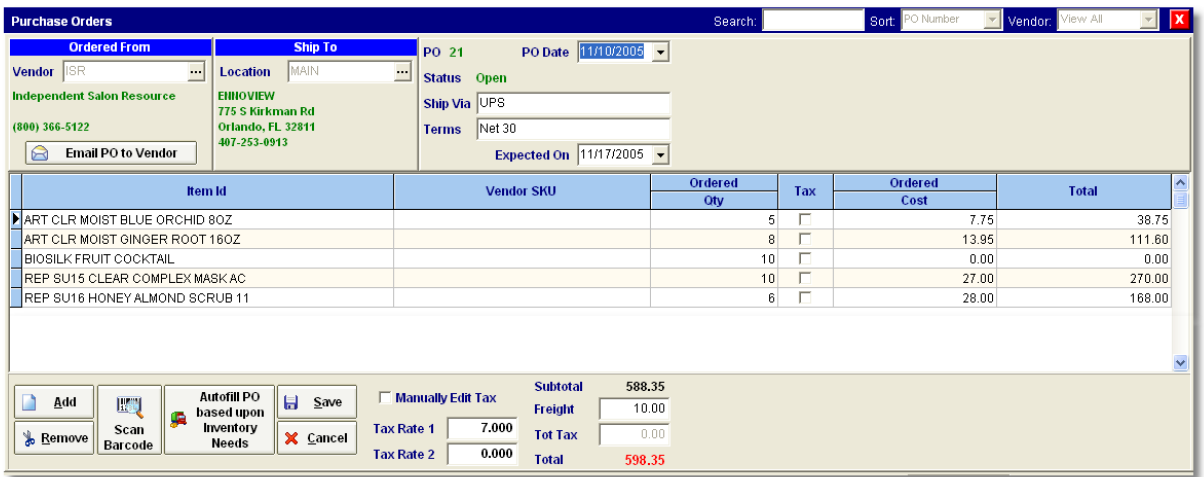
To open the Purchase Order List, click on "Inventory" on the Menu Bar and select "Purchase Orders" from the drop down menu as shown in the image below. You may also click on "Create Purchase Orders" under "Purchase Inventory" on the Inventory Guide window.





The following screenshot is an example of the Purchase Order List:

A Purchase Order will look similar to this:



Ordered 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".

Ship To

Click the small button to select from the list you entered of your store locations when you setup the program. If the list is empty, click the "Add New" button and enter the location "On the Fly".

PO Number

This number is assigned by the program and is always unique for every Purchase Order.

PO Date

This date will be filled in automatically using Today's date from the computer. However, you can change it to any date you wish. You may be doing this on a weekend and will not FAX or Mail it until Monday and might want to use Monday's date instead. The date can only be changed in the purchase order.

Status

The program fills in this area of the screen. When entering a new Purchase Order it will read "Open". If you are viewing a previously entered PO and you have checked the items in using the "Receiving Inventory" feature, you will see the word "Closed". If you received only part of a PO, it will display "Partial".

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.

Expected On

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

Product ID (also called Item ID)

Select from the drop down list the item you wish to order.

Vendor Product Id (Vendor SKU)

This is the ID code the Vendor uses to identify the product. You entered this when you added this item to inventory. It communicates accurately to the Vendor exactly which product you are ordering.

Ordered and Tax / Total

The Ordered Qty (Quantity) and Cost will be automatically filled in if when you first added this product to Inventory you entered a "Qty on Hand", "Reorder At", "Order Level" and "Unit Cost". You may enter or change these fields at the time that you are creating the Purchase Order.

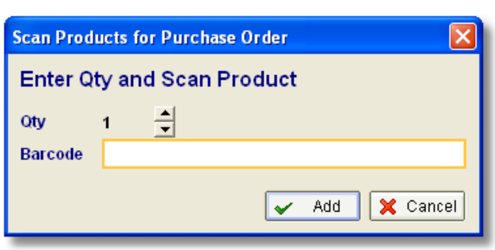
Check the "Tax" box if you must pay sales tax on this item. The values entered into Tax Rate 1 and 2 below will be used to calculate the sales tax. The "Total" field will automatically calculate the dollar amount of the order based on the "Qty" and "Cost" fields.

Add / Remove Item Buttons

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.

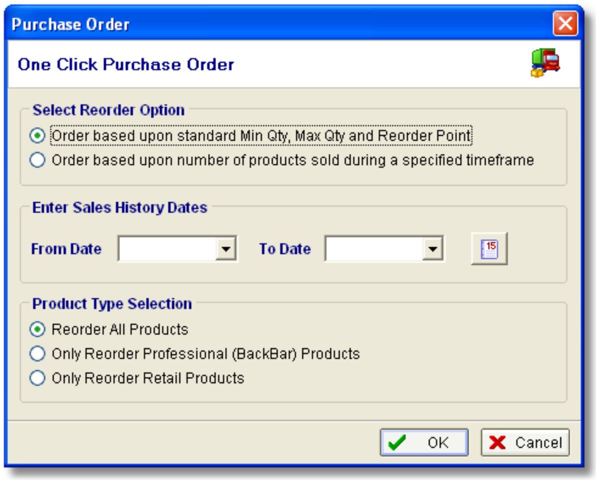
Click the "Remove Item" button to remove the selected (highlighted) item in the list. You will get an "Are You Sure" warning before it is removed.

Scan Barcode Button



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.

One Click Purchase Order



- **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.

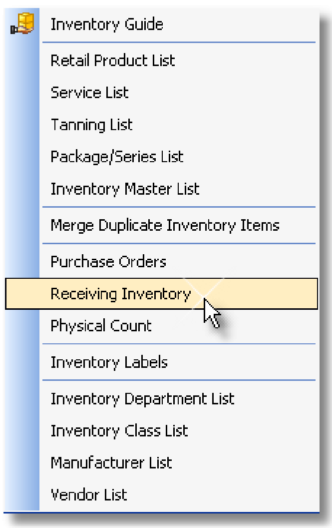
Tax Rates 1 & 2

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.

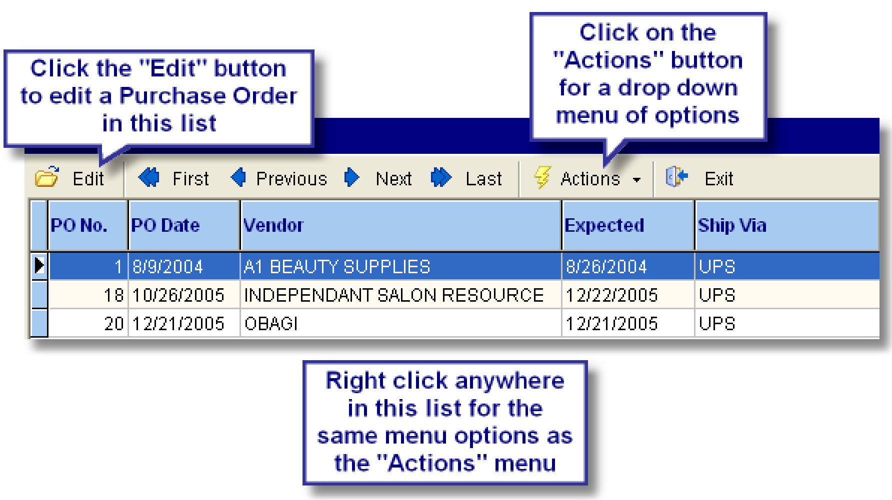
Receiving Inventory

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".

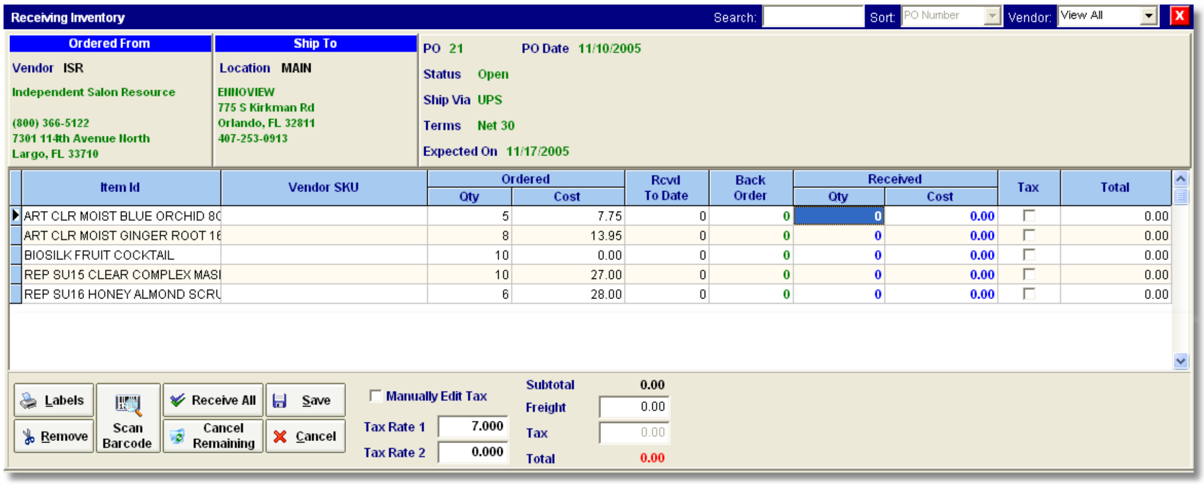
To open the Receiving Inventory List, click on "Inventory" on the Menu Bar and select "Receiving Inventory" from the drop down menu as shown in the image below. You may also click on "Receive Inventory" under "Purchase Inventory" on the Inventory Guide window.



The following image is an example of the Receiving Inventory List:



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



Received PO information

The Item ID, Vendor Item ID, and Ordered Qty - Cost are filled in from the Purchase Order.

Received To Date and Back order

These fields will automatically fill in when you enter the Qty received. They are mostly used for Partial filling of Purchase Orders. For example, if you ordered a quantity of 10 of one item and only 4 of that item was received, the Received To Date would show 4 and the Back Order would show 6.

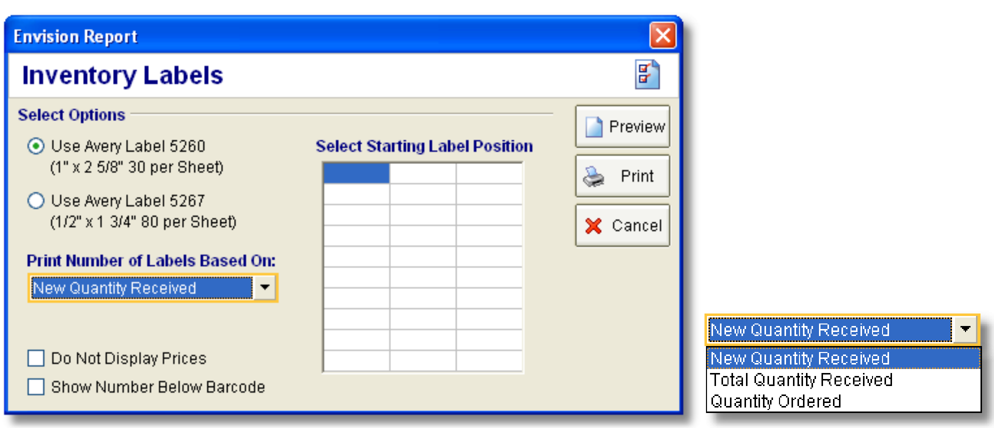
Received Qty and Cost – Tax/Total

You may enter the actual Quantity (by physical count) and Cost in these fields when the items are delivered. If all the items are received the Status of this PO will change to "Closed". If only a part of the items were received, the status will change to "Partial".

Check the "Tax" box it you must pay sales tax on this order. The tax amounts you enter at the bottom of this screen will determine the dollar amount that appears in the "Tax" field at the bottom of this form.

The Total for this order will appear when you enter the quantity received.

Labels

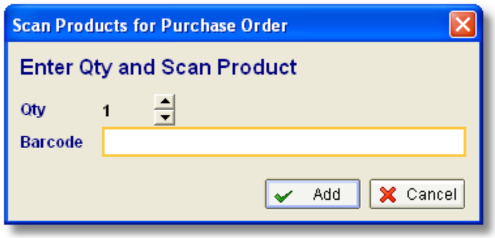


Click this button to print your own barcode labels for these products. Click on the drop down arrow under "Print Number of Labels Based On" to select how many labels you wish to print depending on the quantities in the order.

Remove Item

Click here to permanently remove this item from the Purchase Order.

Scan Barcode Button



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.

Receive All

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.

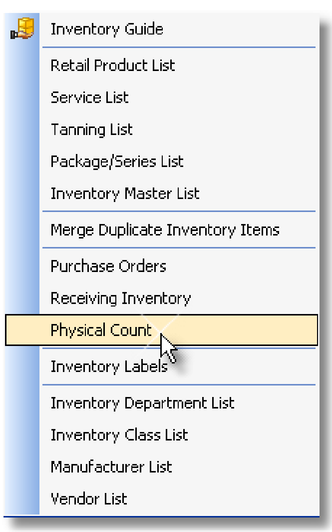
Cancel Remaining Items

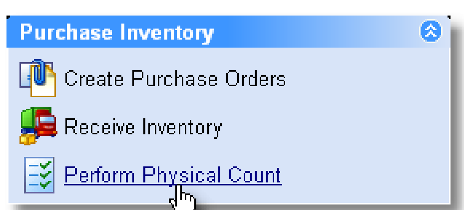
Click this button to cancel all remaining items that haven't been received.

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.

To open the Physical Count Sheet, click on "Inventory" on the Menu Bar and select "Physical Count" as shown in the image below. You may also click on "Perform Physical Count" under "Purchase Inventory" on the Inventory Guide window.





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

Physical Count Item Information

The first 5 columns display the information you need to identify the product.

Physical Count Original Columns

These 2 columns display the Cost and On Hand amounts that the program contains. The On Hand count is adjusted when you check in Inventory (using the "Receiving Inventory" screen) and when you sell these products at the Point Of Sale (POS).

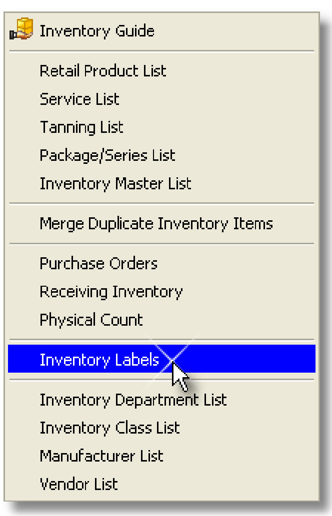
Enter New Physical Quantity

Enter the actual number of this item in this field. It will not immediately update the programs count. 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 this column will overwrite the counts maintained by the program.

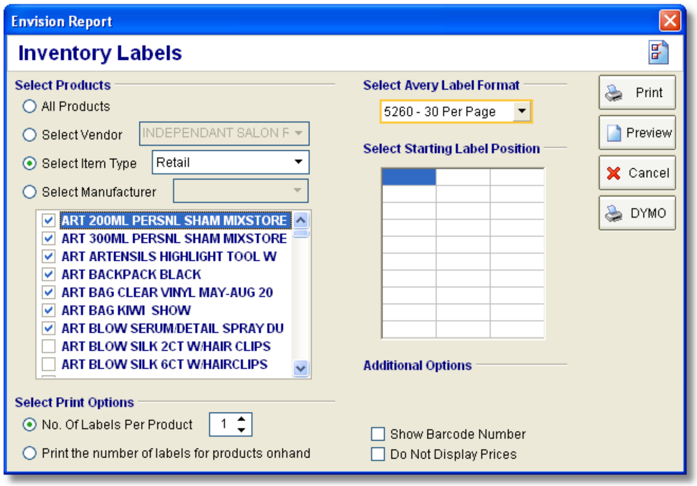
Note: If the Physical count matches the programs count enter a "0" (zero) if one is not already there. A zero tells the program to make no changes.

Printing Inventory Labels

This feature can be reached by clicking on "Inventory" on the Menu Bar and selecting "Inventory Labels" from the drop down menu. You may also click on "Print Inventory Labels" under "General Options" on the Inventory Guide window.



The following screen will appear:



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.

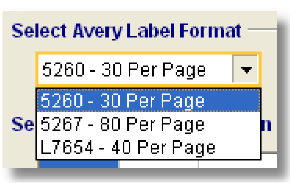
Select Print Options

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.

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.

Starting Label Position

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

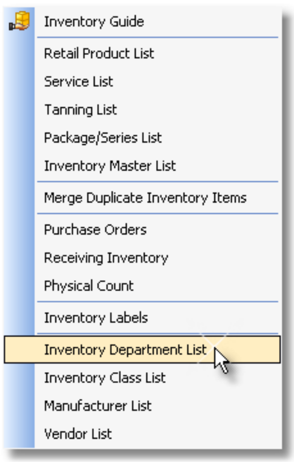
Additional Options

- 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.

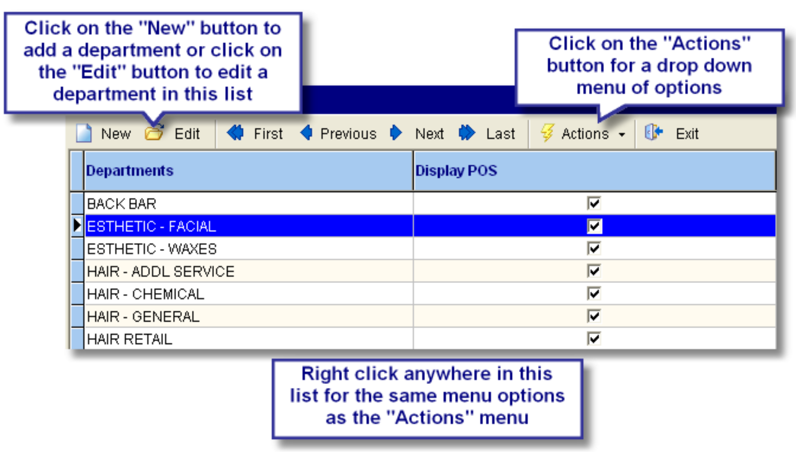
Inventory Department List

The Department List 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. You may also add departments to this list when you are entering your inventory items.

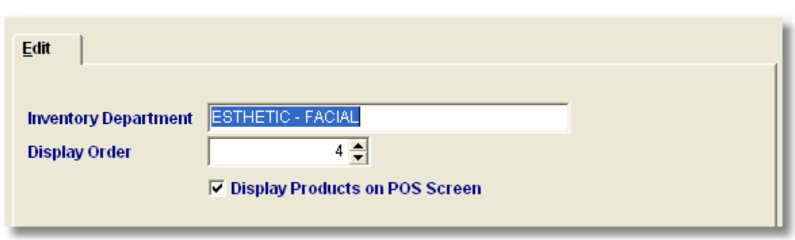
To enter the Inventory Department List, click on "Inventory" on the Menu Bar and select "Inventory Department List" from the drop down menu as shown in the image below. You may also click on "Setup Inventory Departments" under "Utilities" on the Inventory Guide window.



The following image is an example of the Inventory Department List:



Use the screen displayed below to add or edit an Inventory Department.

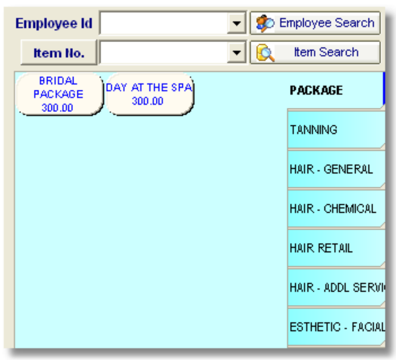


Department Names

Enter a brief but clearly understood name for a department in the "Inventory Department" field. This name is what will be displayed on the drop down lists throughout Inventory.

Department Display Order

This number determines where this department's "Tab" will appear on the Point Of Sale screen. For example, if you set a Department called "Package" to "1" and all the other Departments have higher numbers, the department tabs will appear as displayed in the image below.



If all the Department Order numbers are the same (for example "0" which is the default), the tabs will display alphabetically.

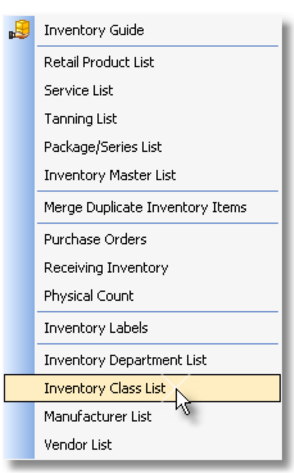
Display Products on POS Screen

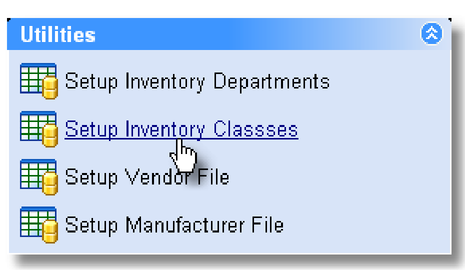
If this box is checked, all the items for this Department will be displayed on the Point Of Sale screen. The default is checked, however you may want to uncheck this for some departments you create, for example, In-House Cleaning Supplies.

Inventory Class List

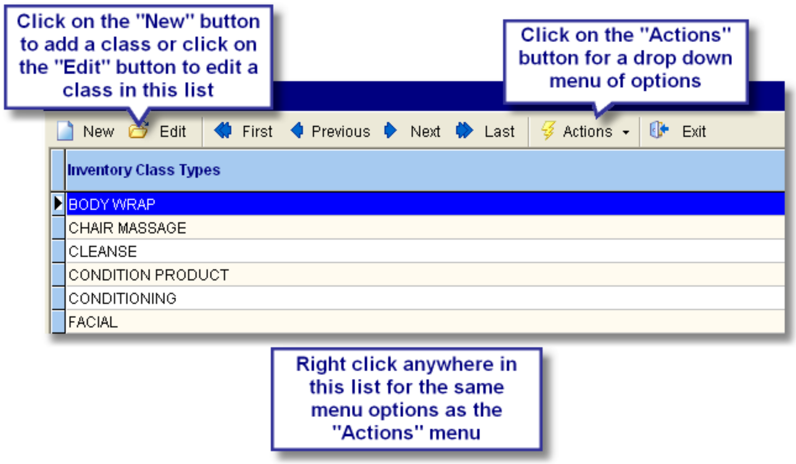
The Inventory Class Screen is where you Add or Edit the various classes of inventory you wish to use.

To enter the Inventory Class List, click on "Inventory" on the Menu Bar and select "Inventory Class List" from the drop down menu as shown in the following image. You may also click on "Setup Inventory Classes" under "Utilities" on the Inventory Guide Window.





The following image is an example of the Inventory Class List:



Use the screen displayed below to add or edit an Inventory Class.

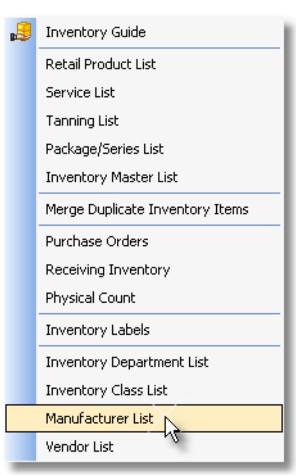
Class Type

This field along with Department can help you organize your inventory into logical groups. Some examples of Class might be "Shampoo" or "Conditioner" if you would like to use the Class as a subcategory of a department. Using the Class field will help you to organize your reports and view a smaller more convenient inventory listing. The Classes can be from different departments and be of different Item Types. You may also add classes to this list when you are entering your inventory items.

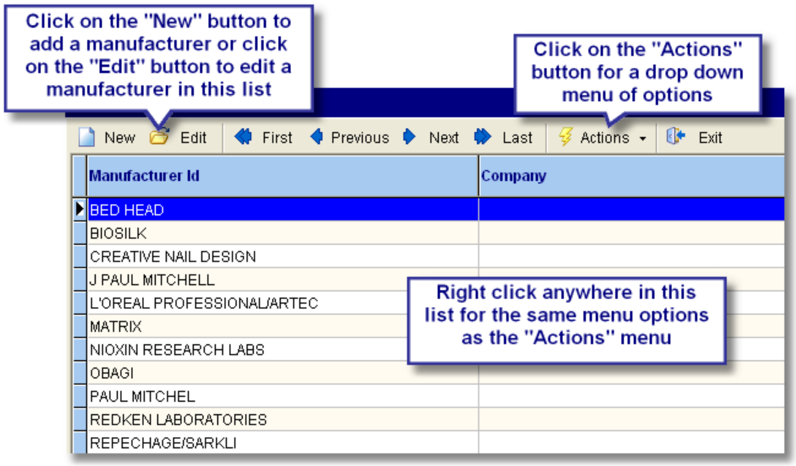
Manufacturer List

The Manufacturer List is available for you to enter all of the manufacturers of the products you sell. You may sort lists by the Manufacturer so that items in your retail product lists are easier to locate. You may also add manufacturers to this list when you are entering your inventory items.

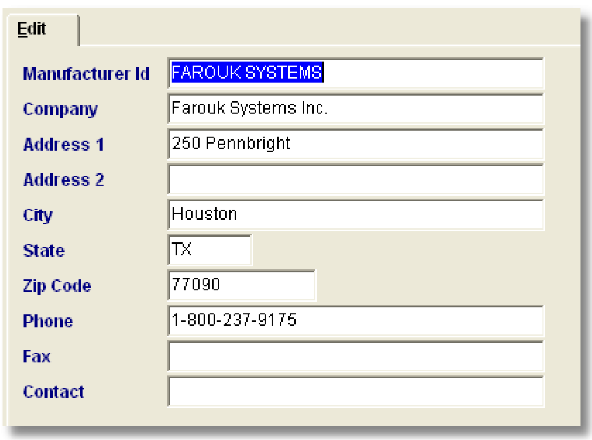
To enter the Manufacturer List, click on "Inventory" on the Menu Bar and select "Manufacturer List" from the drop down menu as shown in the image below. You may also click on "Setup Manufacturer File" under "Utilities" on the Inventory Guide window.



The following image is an example of the Manufacturer List:



Use the screen displayed below to add or edit a Manufacturer.



Manufacturer Id

You may enter an abbreviated name or the Manufacturer's name in this field. It appears on reports and will make locating a particular manufacturer easier.

Manufacturer Company

Enter the name of the Manufacturer of the inventory item. Use the name shown on your invoices as this will be printed on your Purchase Orders.

Manufacturer's Demographic Information

Enter the standard information in the spaces provided. Notice that there is a 2nd address line to be used for Suites, Apartments, Buildings, etc. Also, the Phone number should be that of the Contact you enter.

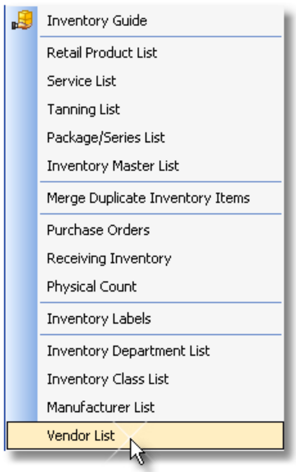
Manufacturer Contact

Enter the name of the person you most deal with at this company. This will help your staff if they need to contact the manufacturer.

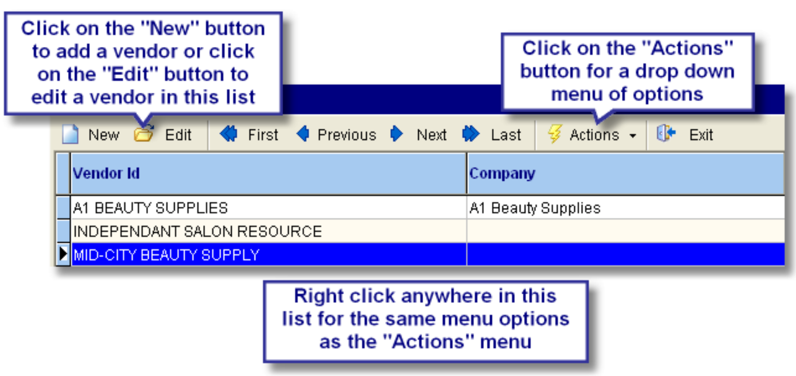
Vendor List

The Vendor List is available for you to enter all the vendors that you purchase products from. Creating this list will allow you to specify the vendor that you purchase a certain product from and will also allow you to create a purchase order for the products that need to be purchased from that vendor.

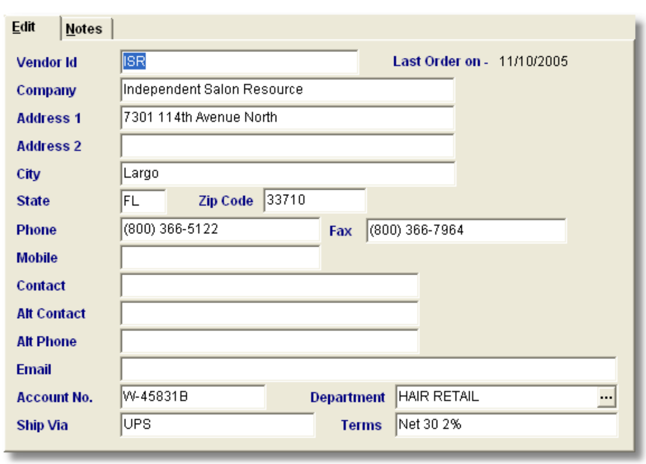
To enter the Vendor List, click on "Inventory" on the Menu Bar and select "Vendor List" from the drop down menu as shown in the image below.



The following image is an example of the Vendor List:



Use the screen displayed below to add or edit a Vendor.



Vendor ID

The field should be an abbreviated form of the vendor's company name. For example, "Walt's Equipment" could be shortened to a Vendor ID of "WALTEQ". There are no duplicate ID's allowed. This field is useful for sorting the Vendor listing and reports.

Last Ordered On

This non-editable area of the screen shows a handy feature that the program provides. The date of the last time you ordered from this Vendor is displayed in this area.

Vendor Company

Enter the full name of the Vendor here. Enter the name the same way the Vendor lists their name on their invoices.

Demographic Information

Enter the standard information in these spaces.

Note: The Address 2 field is used for Suite, Building, Apt., etc.

Vendor Phone / FAX

Enter the telephone number for the Vendor. It is recommended that if there are several numbers, you enter the Contact's number. If the Vendor has a FAX number and you care to use it, enter the number in the "Fax" field.

Vendor Contact

Enter the name of the person you most often speak to or correspond with, at the Vendor's company.

Alternate Contact Information

Enter an alternate contact name and phone number in these fields.

Vendor Account

Enter the Account number the Vendor uses for your business. This will be printed on the Purchase Orders that you send to the vendor.

Vendor Department

If all the items this Vendor supplies to you are in the same department, enter that department here. For example, if you have a vendor that only supplies tools for cutting hair, you would assign a department (that you created in setup) such as "Beautician Equipment".

Vendor Shipping

Enter the shipping method used by this Vendor. If the Vendor can use several methods, enter the one that you requested they use, or that they most commonly use. UPS, FEDEX, Truck, and USPS are some examples.

Vendor Terms

Enter the Payment Terms this Vendor offers you. It could be anything from Prepaid to COD to Net 30.

Vendor Notes

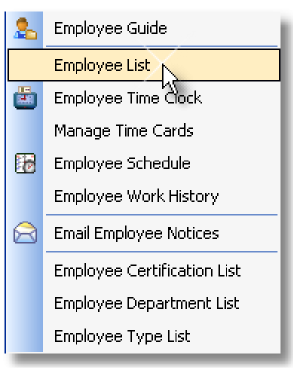
Enter any notes that you may need to keep on record for this vendor.

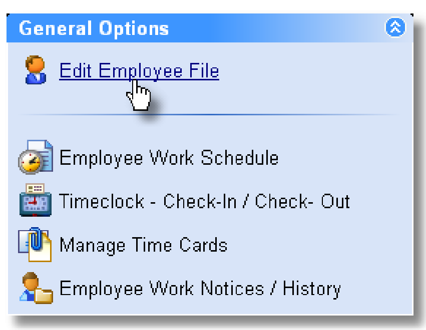
Employee Setup

Employee List

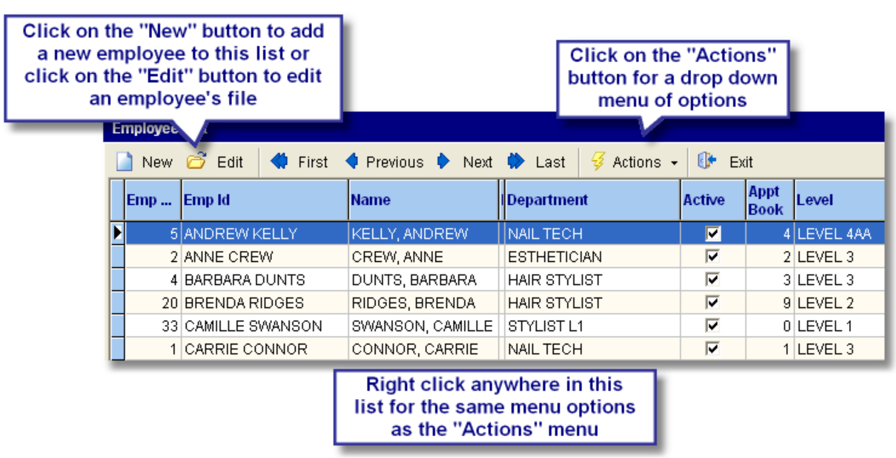
There are many screens provided in Envision to enter Employee information. Enter all the information about the employee you wish on these screens and then click the "Save" button to save all the screens. Some of the information provided on these screens may not apply to your business. You may leave them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

To enter the Employee List, click on "Employee" from the menu bar and select "Employee List" from the drop down menu as shown in the image below. You may also open the Employee List by clicking on "Edit Employee File" under "General Options" on the Employee Guide window.





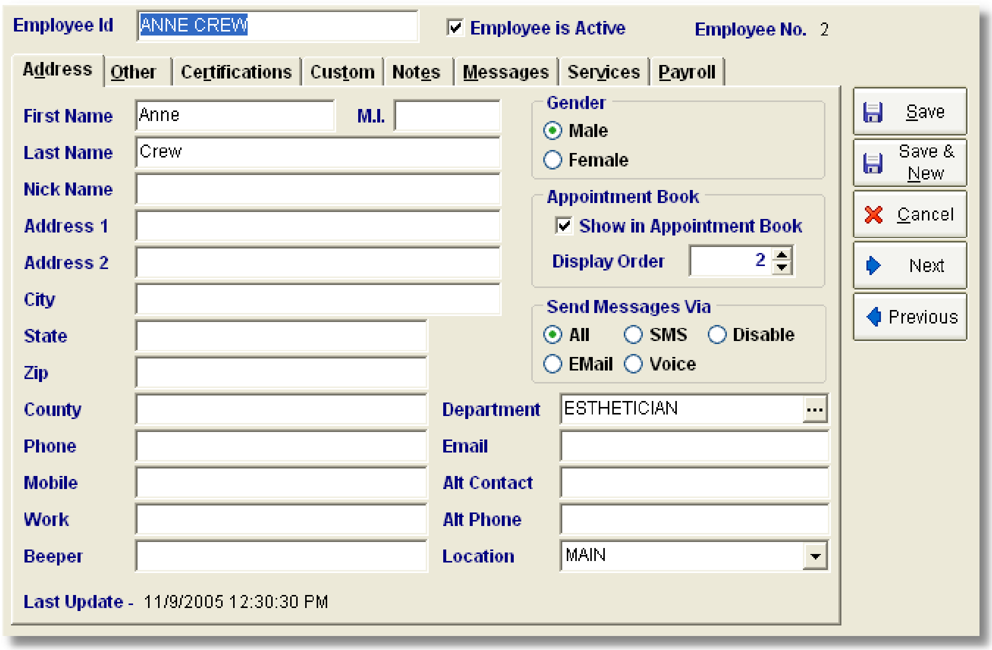
The following screenshot is an example of the Employee List:



Note: The "Level" column on this list is used for a KRS Level that is used by KRS Salons. This is not the "Service Price Level" that you may set on the "Other" tab of each employee file.

Click the "New" button on the List 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. You may also double left click on top of an employee in the list to edit their file. The "Address" screen will appear as shown in the image below.

Employee Address Tab



Employee ID

You may enter the Employee ID as you wish, however it is recommended that you enter the full first name and full last name if you have a very large list of employees. It will be easier to search for an employee's name when selecting an employee to book an appointment or create a sales ticket. You may use numbers or abbreviated names if you wish, just keep in mind that it may be difficult for some of your employees to search for an Employee Id if they do not know everyone's number or abbreviated name.

Employee Name/Gender

- Enter the employee's First, Middle, and Last names in the indicated fields. You may also enter a "Nickname" that the employee is known by.
- Click the appropriate "Gender" button.

Employee Demographic

Enter the standard address information. There is a second Address field for Apartment, Suite, or Building, etc.

Employee County

Enter the county that the employee lives in.

Employee Phone Numbers

Enter Telephone numbers in these fields. If the work number is your business number, you might want to enter the employee's extension here.

- ### Appointment Book

- **Show in Appointment Book:** Check the "Show in Appointment Book" checkbox to show this employee in the Appointment Book. You may want to uncheck this box for front desk staff since they are not service providers, they will not need their own column in the calendar.

- **Display Order:** 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. Every employee that has the "Show in Appointment Book" checkbox checked will need to have a number other than "0" in the "Display Order" field for this to work properly.

- ### Employee Department

Select the Employee Department by clicking on the small button in the Employee Department field. Click the "Add New" button if the department needs to be entered into the Employee Department List.

- ### Employee Email

Enter the employee's email address (if they have one). You may use this to email the employee their work schedule, appointment schedule or a notice.

- ### Employee Alternate Contact

Usually you would enter emergency notification information in these two fields. You could also enter a temporary contact person and phone number if your employee is relocating.

- ### Employee Store Location

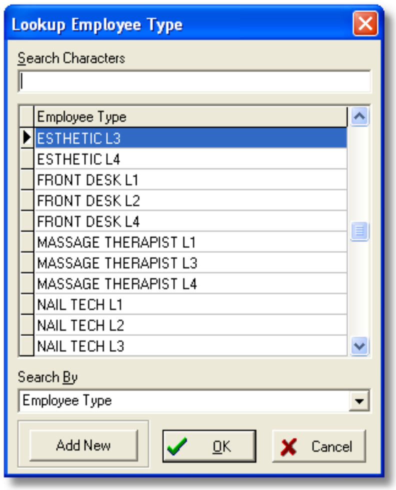
If you have several business locations and you are using the Enterprise version of Envision, select the appropriate location from the drop down list.

Employee Other Tab

Employee Type

You may create or select an Employee Type if your Employee Departments have different types of employees under each department. You may also use this for categorizing your employee. An example of an Employee Type would be Hair Color Specialist, or you may use the Type to specify whether your employees are Full Time or Part Time. It is not necessary to enter an Employee Type.

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. Select this Type from the list and click on "OK".

Employee Dates

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

Password and Security Level

The "Password" and "Security Level" are used for the program's security feature and Time clock.

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 use to login and logout with. The Security Level can be selected after you have set up Security Profiles for different types of employees.

Employee Pager Setup

The "Pager Type" and "Pager ID" are to be entered if you are using the pager system. Select the Pager Type and Pager ID for the employee that you are entering information for.

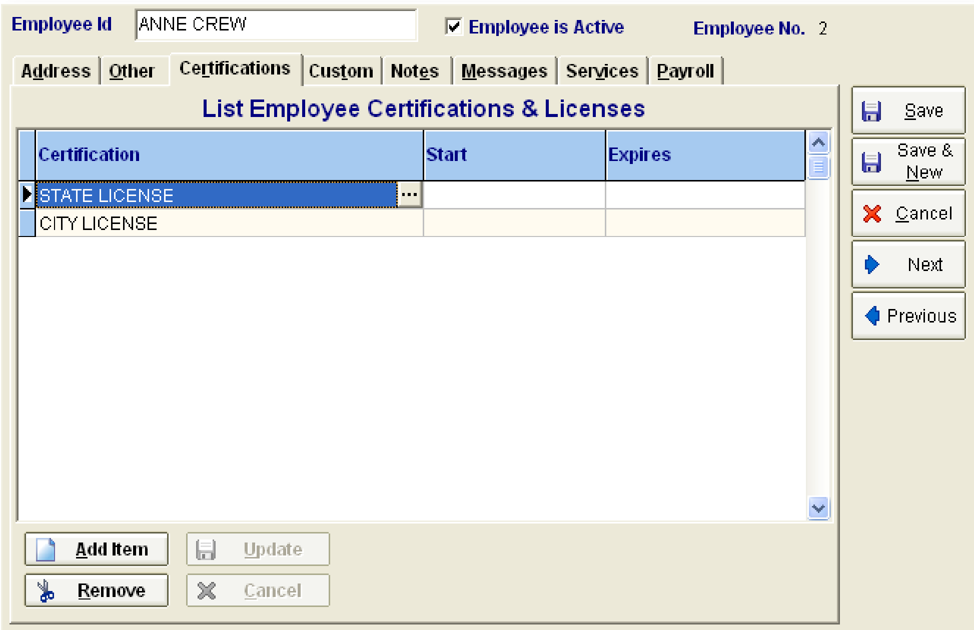
Service Price Level

The "Service Price Level" is the level associated with the price levels you setup for services. This is the price level that your employee will charge their clients.

Note: This Level is not displayed on the Employee List. The "Level" column on the Employee List is used for a KRS Level that is used by KRS Salons.

Employee Certifications Tab

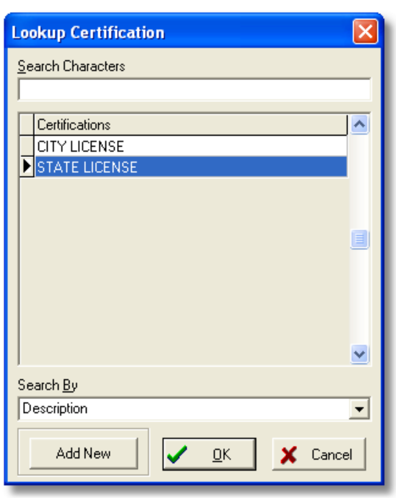
Certifications can be State, Federal, Local, or just created by you for your business. Enter them in the "Employee Certification List" choice on the "Employee" menu, and they will be available to select here.



Employee Certifications

Click the small button in the "Certification" field and choose from a certification or qualification that you entered during setup. After selecting the Certification, enter the dates the Certification is good for. If a Certification or qualification has no expiration date, leave that field blank. If you press the down arrow key on your keyboard, or press the Tab key from the "Expires" field, a new line is created for an additional Certification. You may enter as many as you wish.

- 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 and click on the "OK" button. Select this Certification from the list and click on "OK".

- You may then enter the "Start Date" and "Expiration Date" of this 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.

Employee Certification Buttons

- **Update:** Click the "Update Item" button to save the certification or license that you have selected.
- **Add Item:** Click the "Add Item" button to add a new line to the list so that you may select an additional certification or license.
- **Remove Item:** Click the "Remove Item" button to remove the additional item or line.
- **Cancel Changes:** Click the "Cancel Changes" button to cancel any changes that you have made before clicking the "Update Item" button.

Employee Custom Tab

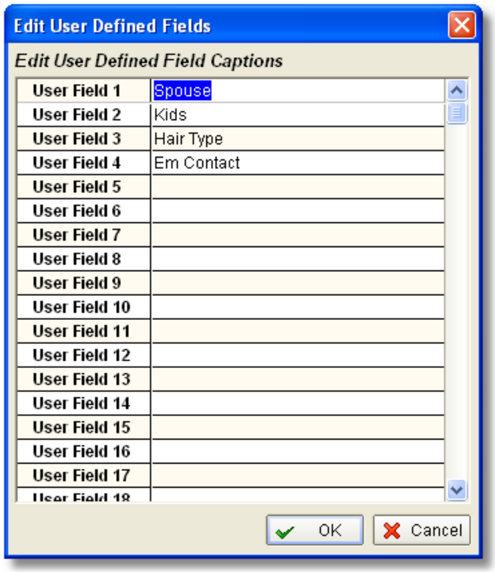
Both Clients and Employee's can have custom fields. These fields allow you to create spaces to enter information in addition to what is provided by the program.

Employee Custom Fields

Enter the information applicable to the Custom fields you have created. Since no program can possibly foresee all the fields your particular business will require in the future, this screen is provided so you can create your own fields, and enter the corresponding information.

Modify Custom Fields

To set up a new type of field, click the "Modify Custom Fields" button and the following screen will appear.

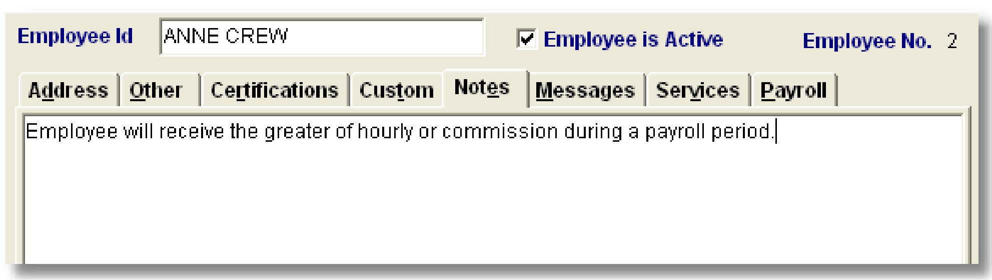


To add a field just type the name you wish to appear and click "OK". Now this name will appear on the Employee Custom Screens and you and your employees can enter the information. For example, in the space next to "User Field 1" you might want to type "Spouse Name". Then click "OK" to save this. Now when you use the program and select the Custom screen you will see a field for entering the Spouse's name.

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.

Employee Notes Tab

This is a screen with a single free text area that is unlimited in capacity.

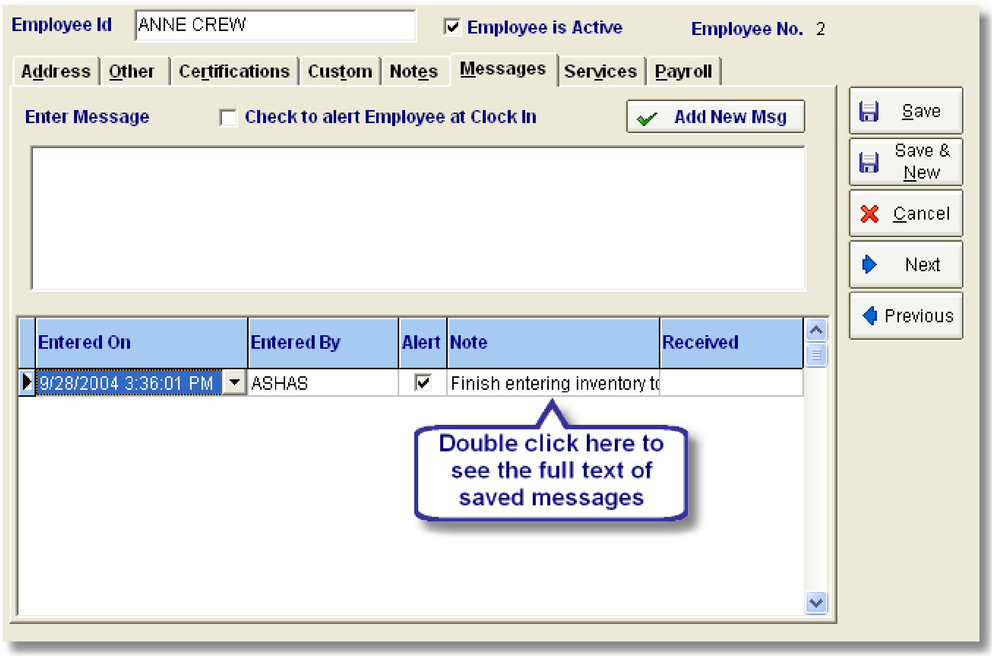


Employee Note

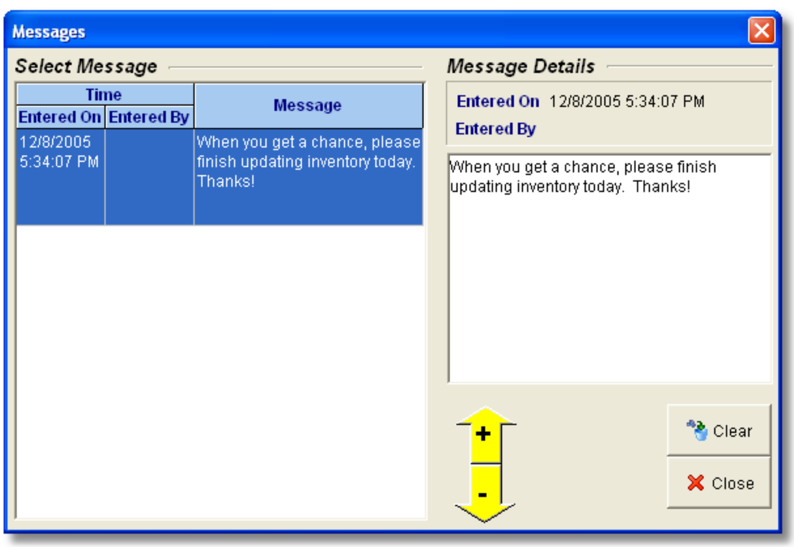
This screen contains one field that is a text field. It has no limit to how much information you may enter. It is very useful for entering comments on the employee's performance. These comments would then be used to refresh your memory when you need to produce an Employee evaluation or determine an amount for a raise.

Employee Messages Tab

Unlike the Notes screen, these small text messages can be made to pop up when the employee clocks in.



- **Check to Alert Employee at Clock In**



If this box is checked, the message you enter will pop up on the screen when the employee clocks in using the Time Clock.

Employee Add New Message Button

Click this button to add the message text you have entered to the list of messages. This saves the message and clears the large text area for a new message.

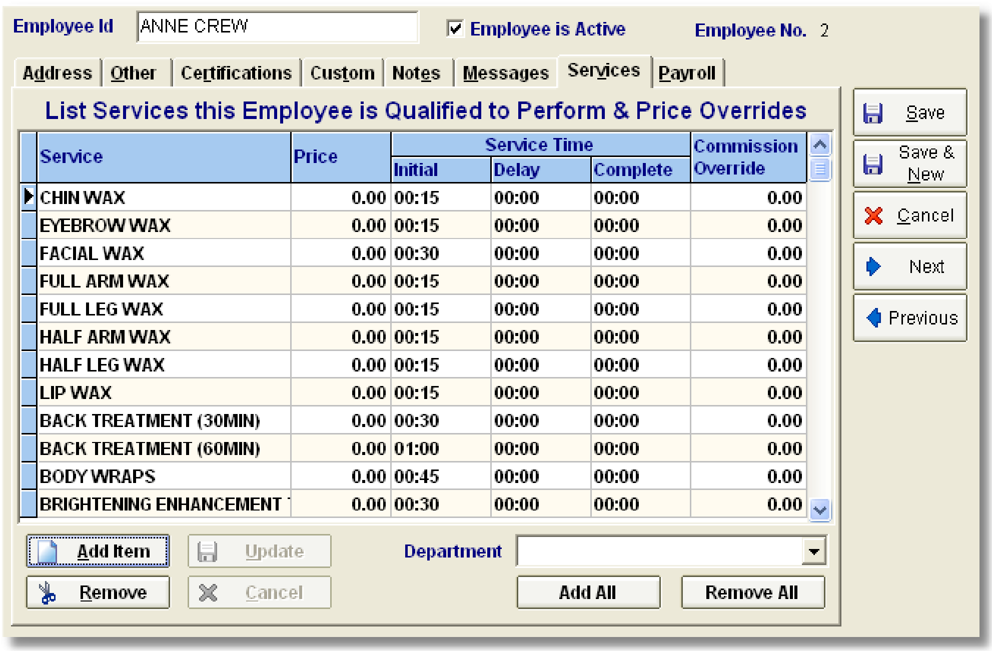
Employee Messages Saved

This area of the screen will display all messages that have been saved and a brief portion of the text for each message.

Note: To see the full text of the message, double click the brief text under "Note".

Employee Services Tab

Qualified services that this employee is capable of performing can be entered on this screen. This will be useful when scheduling appointments. If you have new front desk staff, they will not be able to make the mistake of scheduling a service that the provider is not able to perform.



Employee Services List

This listing displays the services this employee is capable of performing. Click the "Add Item" button at the bottom of this screen to create a new row. Then click the small button in the "Item" field to get a listing of the service items you have entered into inventory.

Employee Service Price

Enter a separate price that the selected employee charges if this price is different than the prices you set on the "Pricing, Qty & Commission" tab when entering a service in the Service List. This price will override the service price when this employee is selected in the POS window.

Employee Service Time

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 the time that you have set for the service in the Service List. If the time will be the same as the time you have entered for the selected service, it is not necessary to edit the time that appears.

Employee Commission Override

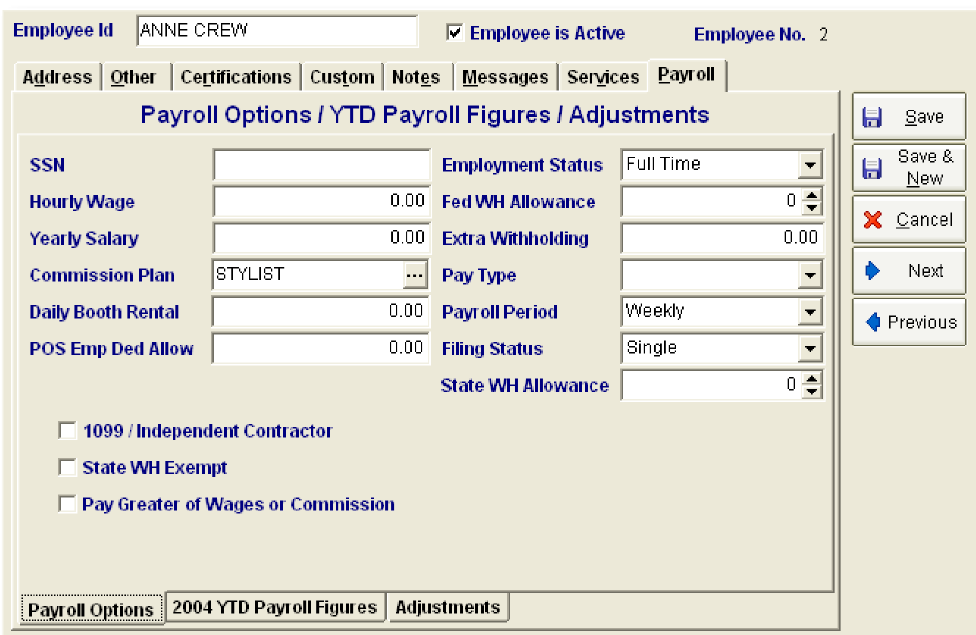
This field allows you to enter a specific commission override for an employee. Enter a specific dollar amount in the Commission Override field if the employee needs to receive a specific dollar amount for the service instead of their regular commission percentage.

Employee Services Buttons

- **Add Item:** Click this button to add a row to the list above so that you may select additional service items that this employee is capable of performing.
- **Remove Item:** Highlight an item on the list then click this button and the item will be removed from the list.
- **Update Item:** Click this button to save an item added to this list. This will allow you to click the "Add Item" button so that you may add an additional item.
- **Cancel Changes:** Click this button to discard any changes you have made to this list.
- **Add All Items:** Click this button and all of the service items you have entered into the system will be added to this employee's record. You will be asked to verify this action before it is completed.
- **Remove All Items:** Click this button and all of the service items will be removed from this employee's record. You will be asked to verify this action before it is completed.
- **Department / Add All:** Select a department using the drop down arrow if you would like to add all of the services from one Inventory Department to this list. Click the "Add All" button after selecting the department.
- **Department / Remove All:** You may also remove all of the services in one Inventory Department from this list. Click the "Remove All" button after selecting the department.

Employee Payroll Tab

This screen allows you to setup the employee's payroll information. Use this screen to enter all of the payroll information available for the employee you are adding to the list. A Commission Plan can only be selected after you have set up your Commission Plan List.



Employee Social Security

Enter the Employee's Social Security Number in this field.

Hourly Wage / Yearly Salary / Pay Type

Select whether this employee is Hourly or on Yearly Salary by entering the appropriate rate and selecting from the drop down "Pay Type" field, on the right, either Hourly or Salary.

Employee Commission Plan

Click the small button in this field to get a drop down listing of commission plans that you have created. Selecting "Commission Plan List" from the "Accounting" menu opens a Commission Plan List that you may use to create commission plans.

Daily Booth Rental

This is the fee you charge your employee to use their workspace. This is normally used only for contract workers.

POS Emp Ded Allow

Enter an amount into this field that the employee is allowed to charge without a payroll deduction.

Employment Status

Select the type of status for this employee. Select from either Full Time or Part Time.

Fed WH Allowance / State WH Allowance

Enter the number of exemptions for the W-4 Form here.

Extra Withholding

Enter a dollar amount the employee requests into this field. This is the amount that will be withheld in addition to the amount determined by the program based on their filing status.

Payroll Period

Select the type of payroll period for this employee.

Filing Status

Select the filing status for this employee from the drop down list.

1099

Check this box if a 1099 form is required for this employee. This usually only applies to contract workers.

State WH Exempt

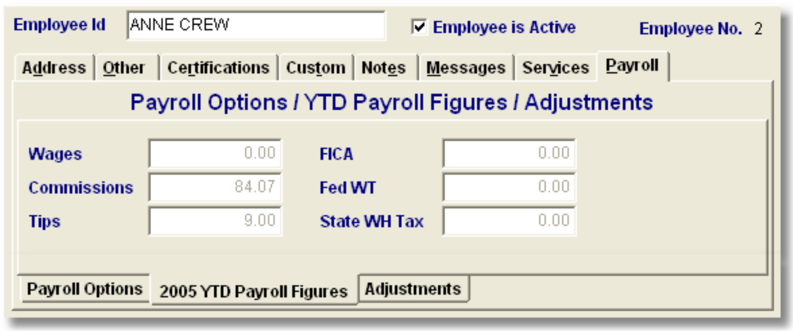
Check this box if this employee should not have State income tax withheld.

Pay Greater of Wages or Commission

Check this box if this employee is setup with an hourly wage as well as a commission plan and you would like the employee to be paid with the pay type that is greater during a payroll period. For example, if this employee has made more with commissions than they have with the hourly wage for the specified payroll period, they will be paid the amount they made with commissions. If there is a payroll period that their hourly wage is greater, they will be paid the hourly wage instead of the commissions.

YTD Payroll Figures Tab

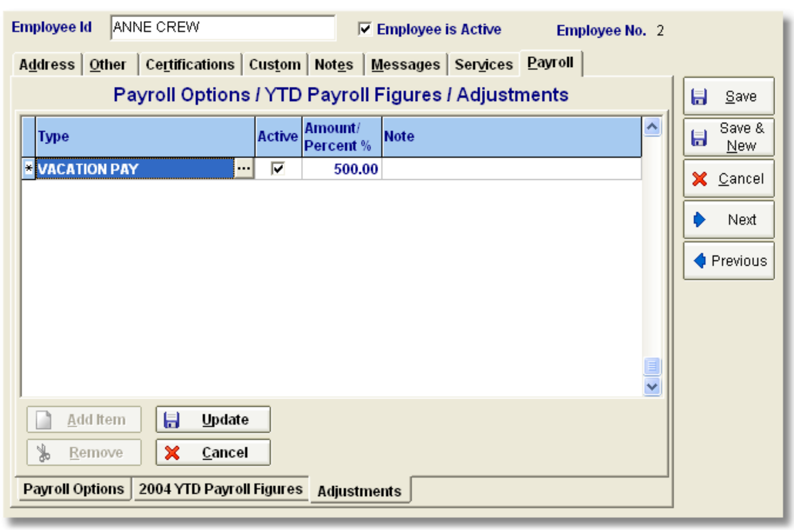
This screen allows you to check all the payroll figures for this employee for the current year. These figures are calculated by the program.



Note: For each new year, the title on the tab will automatically change to the current year.

Employee Adjustments Tab

This screen allows you to set a Payroll Adjustment that you have created that you would like to apply to the selected employee. Payroll Adjustments can be created by clicking on "Accounting" on the Menu Bar and selecting "Pay Adjustment List" from the drop down menu. When the payroll is calculated, the payroll adjustment will be calculated for this employee.



Employee Payroll Adjustment List

Click the small button in the "Type" field and choose from the Payroll Adjustments that you entered in the Pay Adjustment List. After selecting the adjustment, change the amount or percent if necessary and add a note if you need to keep a note on record for this adjustment. You may enter as many as you wish.

Employee Payroll Adjustment Buttons

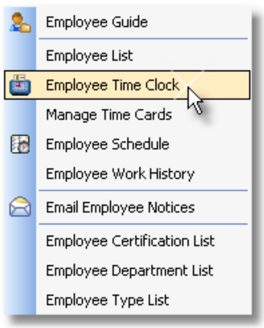
- **Update:** Click the "Update Item" button to save the adjustment that you have selected.
- **Add Item:** Click the "Add Item" button to add a new line to the list so that you may select an additional adjustment.
- **Remove Item:** Click the "Remove Item" button to remove the item or additional line.

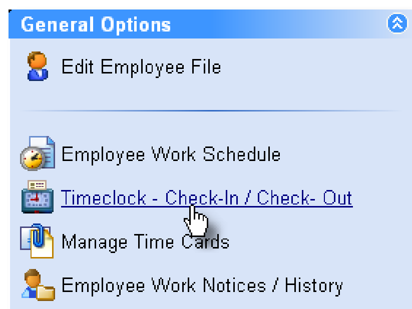
- **Cancel Changes:** Click the "Cancel Changes" button to cancel any changes that you have made before clicking the "Update Item" button.

Employee Time Clock

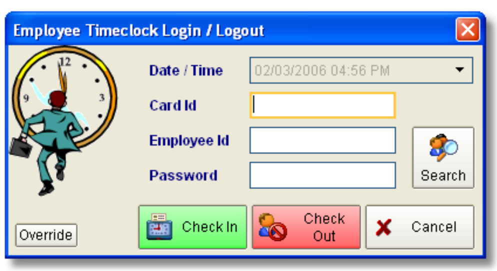
The Time Clock can be a valuable management tool. Even employees that are not "On the Clock", will have requirements for attendance. The hours recorded when each employee Checks In and Checks Out here, will be available for payroll. Any messages entered into the program for an employee can be set to pop up when the employee Checks In.

The Time Clock can be reached by clicking on "Employee" on the Menu Bar and selecting "Employee Time Clock" as shown in the image below. You may also use the "Time Clock" button located on the Tool Bar to open the Time Clock screen shown below. You may also click on "Timeclock - Check-In / Check-Out" under "General Options" on the Employee Guide window to open the Time Clock.





The following screen will appear:



Time Clock Date/Time

This field is entered automatically according to the computer's clock. This can be overridden by clicking the "Override" button, which is password protected.

Time Clock Card Id

Use this field to swipe a card that has the employee's Card Id on it. You may use this field to Check In and Check Out instead of typing in an Employee Id and Password. You must select the "Login via Employee Id Cards" option in the "Employee Timecard / Login" field under the "Options" tab on the "Setup Program Preferences" screen to be able to login with a Card Id.

Time Clock Employee ID & Password

Employees have access to these two fields only. They will enter their Employee ID or number (Click the "Search" button to open an Employee Search list if they are not sure what their Id or number is) and then their Password before the program will allow them to click the "Check In" or "Check Out" buttons.

Time Clock Check In / Check Out

After entering their Employee ID and Password, employees will click either of these buttons as appropriate. They cannot perform illogical operations. For example, if they checked in yesterday but never checked out, they couldn't check in again until they check out from yesterday. This example is why there is an Override for the manager to use. They must click either Check In or Check Out. Pressing the Enter key on the keyboard will not clock them in or out.

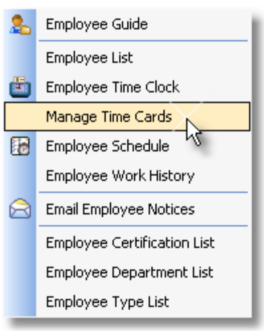
Time Clock Override

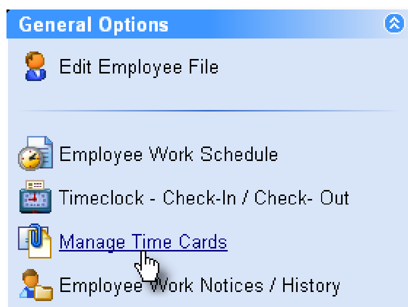
Clicking this button allows you to override the automatic time and date that the program enters into those two fields. The password used is the "Manager Override Password".

Manage Time Cards

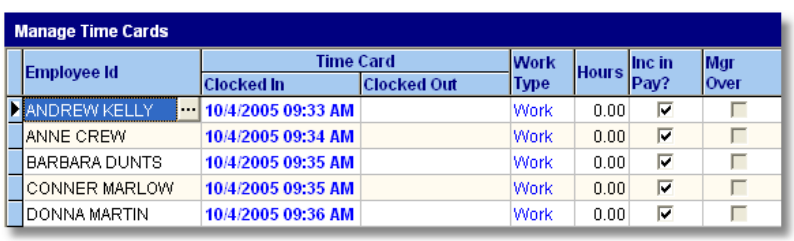
This screen enables you to view and change the times that each employee clocked in and clocked out at. The listing is sorted by the most recent dates first. Notice that if there was a "Manager Override" used when the employee was using the Time Clock, there will be a check mark in the right hand box.

To reach the Manage Time Cards screen, click on "Employee" on the Menu Bar and select "Manage Time Cards" as shown in the image below. Manage Time Cards can also be reached by clicking on "Manage Time Cards" under "General Options" on the Employee Guide window.





The following screen will appear. This is an example of what the Manage Time Cards screen will look like:

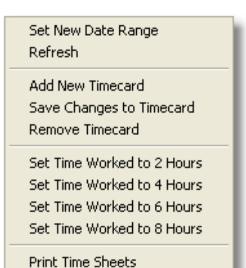


Manage Time Cards

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	☑	☐

You may use this screen to manually edit the employees, dates, and times. Click on top of the Employee name to select a different employee. To change the date or time, click right on top of the date or time so that it is highlighted and type in the new date or time. You may then click on the "Actions" button and select "Save Changes to Timecard".

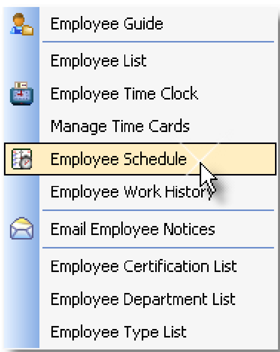
The "Actions" menu (shown below) allows you to do the following:

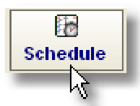


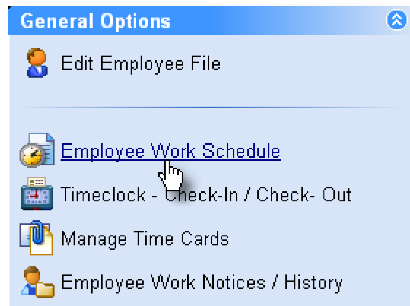
Employee Schedule

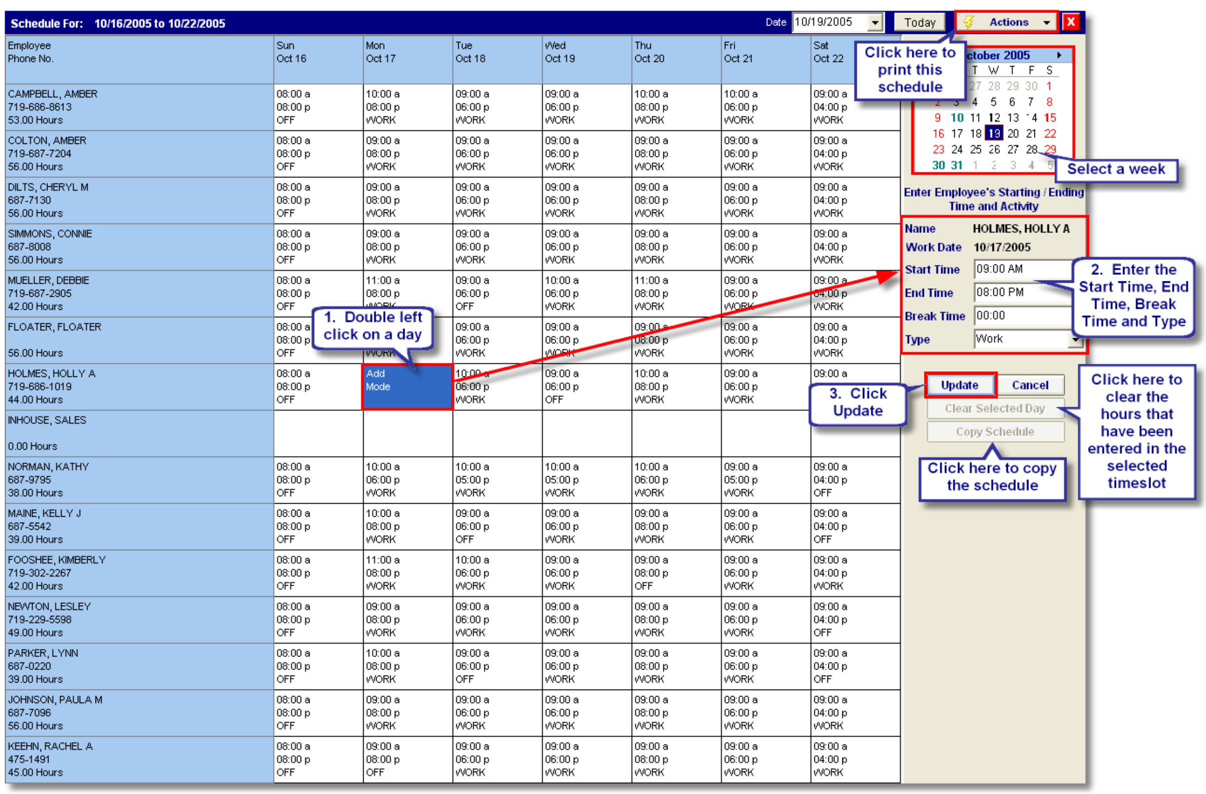
The Employee Schedule is where you will set the hours that each employee is available for in the Appointment Calendar.

To enter the Employee Schedule, click on "Employee" on the Menu Bar and select "Employee Schedule" from the drop down menu as shown in the image below. You may also click on the "Schedule" button on the Tool Bar. Another method of reaching the Employee Schedule is clicking on "Employee Work Schedule" under "General Options" on the Employee Guide window.









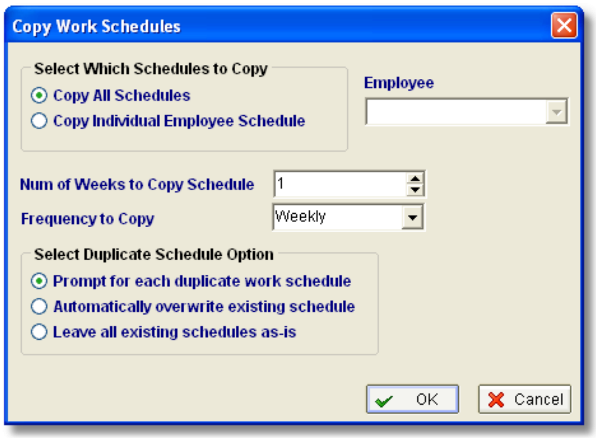
Entering Schedule Hours

- Select a day from the calendar on the right. You may change the month by clicking on the small arrows to the left and right of the month and year displayed
- Double left click on cell (day) to the right of the employee's name you are entering hours for.
- Enter the "Start Time", "End Time", "Break Time" and "Type" in the section below the name of the employee and the Work Date.
- Click the "Update" button when you have finished entering this information.

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.

Copy Schedule

The following screen appears when you click the "Copy Schedule" button on the employee schedule screen. 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 will happen.
- **Automatically Overwrite:** This will overwrite all future weeks without prompting you.
- **Leave all Existing:** This will not overwrite any future weeks.

Clear Selected Day

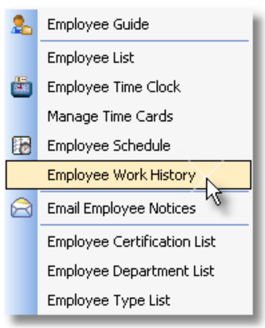
You can also clear a selected day for an employee by highlighting the day and clicking the "Clear Selected Day" button.

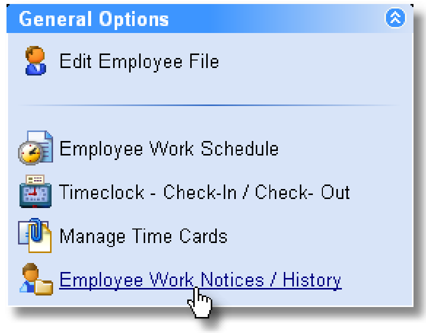
Click the "Actions" button to print this schedule.

Employee Work History

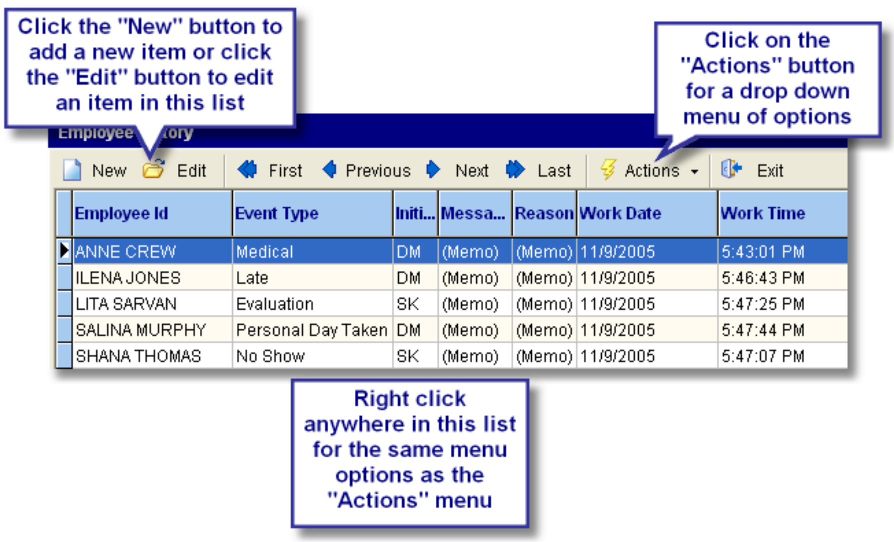
This feature allows you to keep records of your employees' work history.

The Employee Work History file can be reached by clicking on "Employee" on the menu bar and selecting "Employee Work History" from the drop down menu as shown in the image below. You may also click on "Employee Work Notices / History" under "General Options" on the Employee Guide window to open this list.

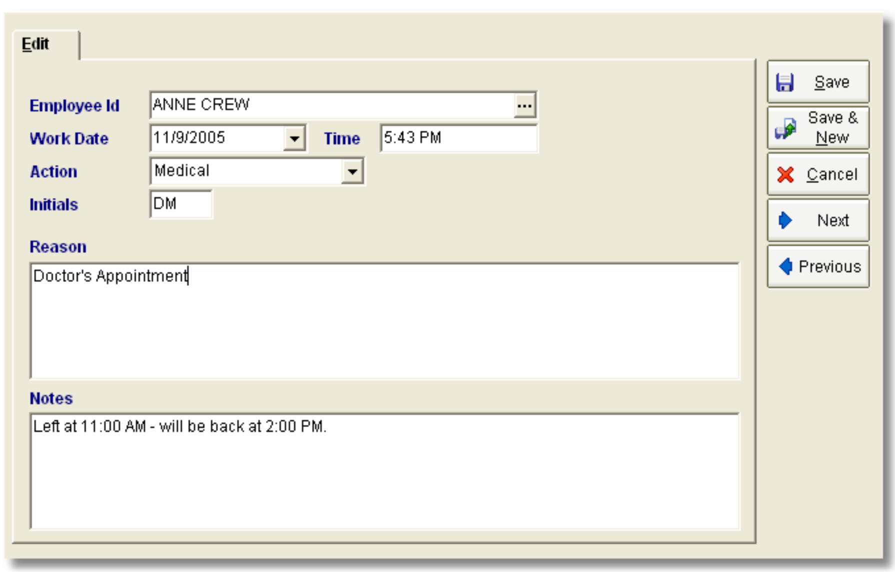




This image below is an example of the Employee Work History list. The "Event Type" column will give you an idea of what this feature can be used for.



You may click the new button from this list to add a new file. The following screen will appear:



Employee Id

Select the employee that you are entering work history for.

Work Date & Time

Select the date and time that the work history is for.

Action

Select the type of action for the work history.

Initials

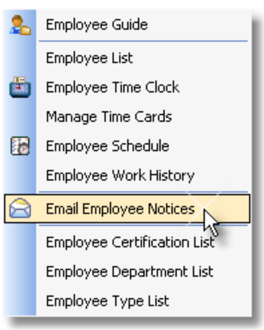
Enter your initials if you would like to keep track of who enters employee work history.

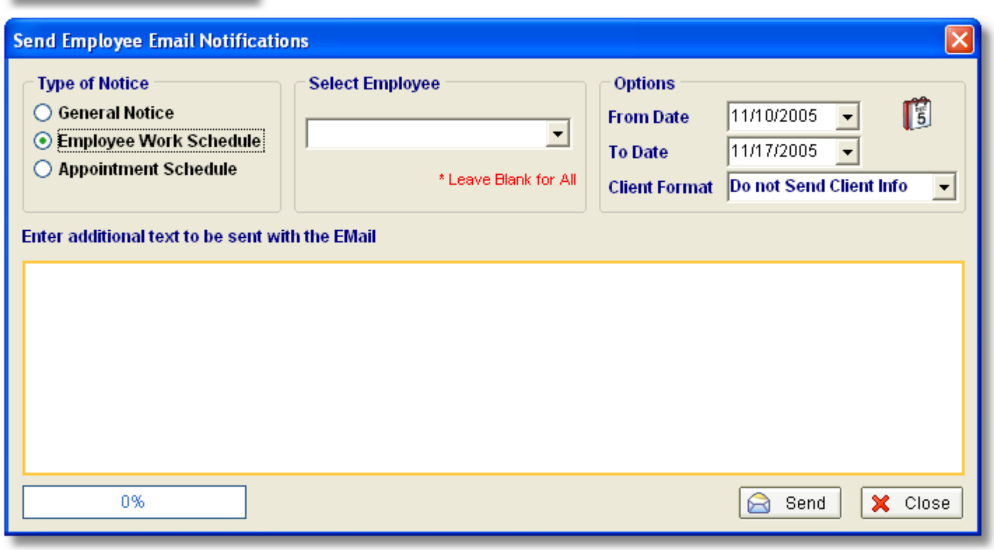
Reason & Notes

Enter a reason for the work history or a reason that applies to the type of action and enter any additional notes.

Email Employee Notices

This feature allows you to email your employees general notices, their work schedule or their appointment schedule. To open the Email Employee Notices screen, click on "Employee" on the Menu Bar and select "Email Employee Notices" as shown in the image below.





Type of Notice

Select the type of notice you will be sending. Select either General Notice, Employee Work Schedule or Appointment Schedule.

Select Employee

Select the employee that you are sending the email notice to. If you would like to send the notice to all of you employees, leave this field blank.

Options

Select the From Date and To Date and select the Client Format.

Enter Additional Text

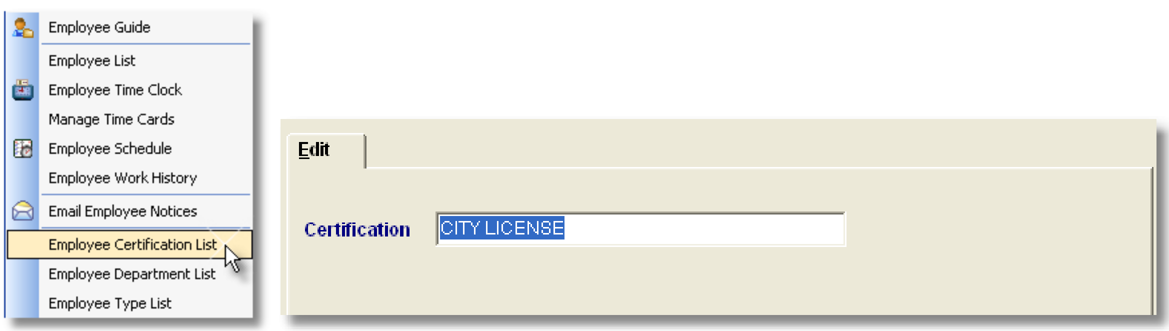
Enter any additional text that you would like included in the email.

Send & Close

Click the "Send" button when you are ready to send the notices or click the "Close" button to close out of the email notices screen.

Employee Certification Setup

To enter the Employee Certification List, click on "Employee" on the Menu Bar and select "Employee Certification List" as shown in the image below. Click the "New" button on the List Tool Bar to enter a new certification.



This screen is used to enter qualifications that your employees have obtained. This could include State Certifications, industry standards, Licenses, or qualification levels that you establish.

Employee Department Setup

To open the Employee Department List, click on "Employee" on the Menu Bar and click on "Employee Department List" from the drop down menu as shown in the image below. Click the "New" button on the List Tool Bar to enter a new department.

Employee Department

Enter a new department in the Employee Department Field. The following are some examples of Employee Departments:

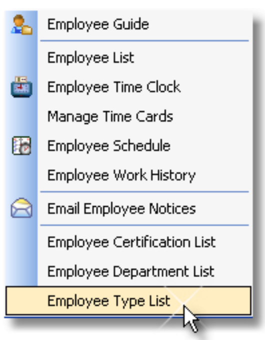
-Hair Stylist
-Massage Therapist
-Esthetician
-Nail Tech

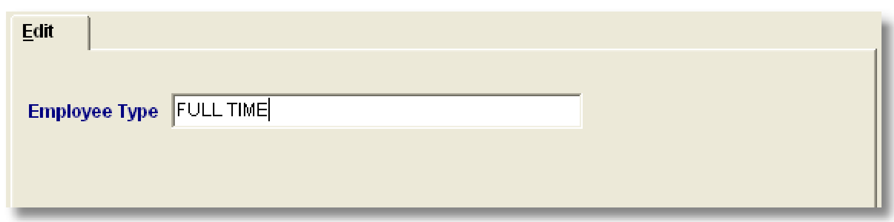
Show Department in Appointment Calendar

Check this box if you would like a tab for this department available in the Appointment Calendar.

Employee Type Setup

You may enter Employee Types however you wish. The Type can be anything you would like it to be. You may also create as many types as you wish. To enter the Employee Type List, click on "Employee" from the menu bar and select "Employee Type List" as shown in the image below.



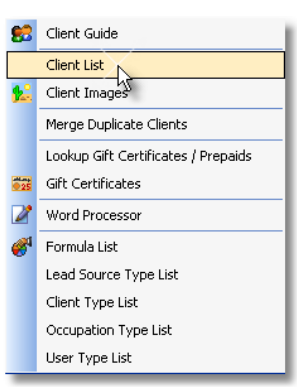


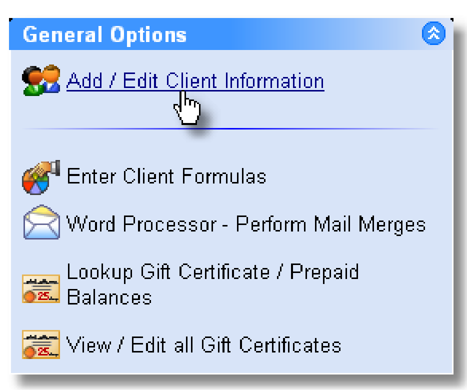
Click on the "New" button on the List Tool Bar to enter a new Employee Type. The above screen will appear.

Clients

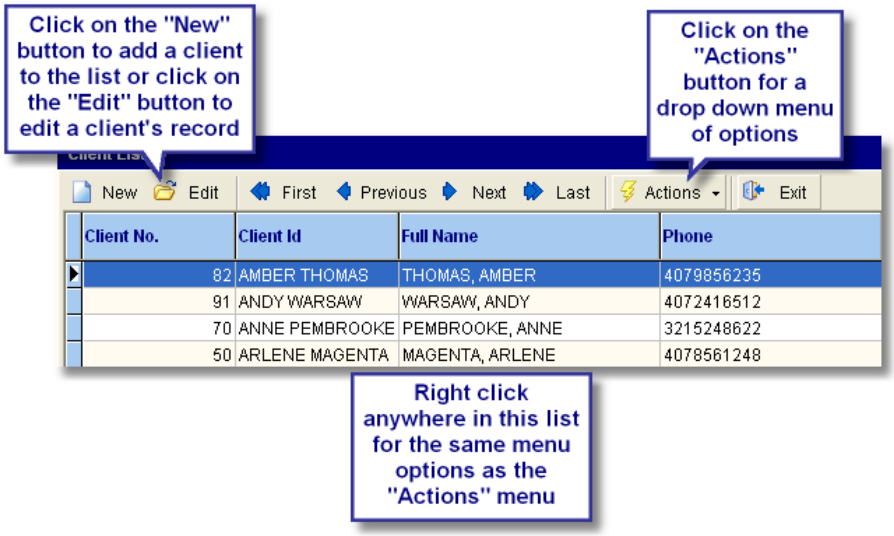
Client List

To enter the Client List, click on "Client" on the Menu Bar and select "Client List" as shown in the image below. You may also click on "Add / Edit Client Information" under "General Options" on the Client Guide window to open the Client List or click the "Clients" button on the Tool Bar.





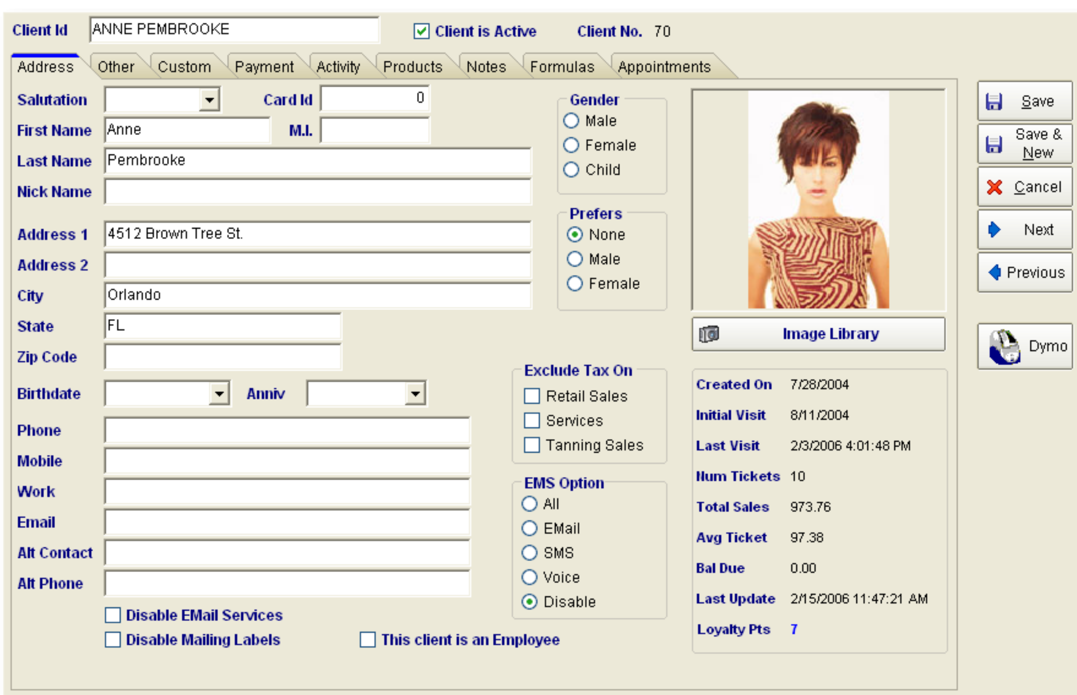
The following screenshot is an example of the Client List:



Click the "New" button on the List Tool Bar to add a new client to the list or you may left click on a client's name (must be highlighted) and click the "Edit" button to edit the client's file. You may also double left click on top of a client in the list to edit their file.

Client Address Tab

Use this screen to enter or edit the basic address and contact information for a client. Notice there are 9 tabs across the top of the screen. Click each of these tabs to enter more information about a client.



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. You may also 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.

Client Is Active

Check this box to keep this client available for selection.

Client No.

This number is assigned by the program to each new client record that has been entered.

Client Name

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

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

Client Address

Enter the Client's address in the fields provided. There is an additional field called "Address 2" that allows you to enter items such as "Apartment #3", "Deerfield Estates", or "Suite 301.

Birth date / Anniversary

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 can be included so they can bring another person for free. This can help increase your client base.

Client Contact Information

This area of the screen allows not only telephone numbers but also Email address and an Alternate contact such as a relative. The "Location" field is only applicable if you operate several locations, then you would choose from the list which location entered this client.

Disable Email Services / Mailing Labels / Appointment Confirmation

Check these boxes to exclude this client from automatic email, mailing labels, or any appointment confirmations that you generate to your clients.

Gender / Gender Preference

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".

Image Library

Click this button to open the Client Images window. The Client Images feature will allow you to add images from a camera or from a location on your computer, view images, compare images, and edit images.

Exclude Sales Tax

If for any reason this client need not pay sales tax on any of the Item types listed, check that item. One example, if you are heavily discounting all your services to a charitable organization, you may be allowed to not charge Sales tax on those services.

EMS Options

Select the Envision Messaging Service confirmation method this client prefers.

Last Update

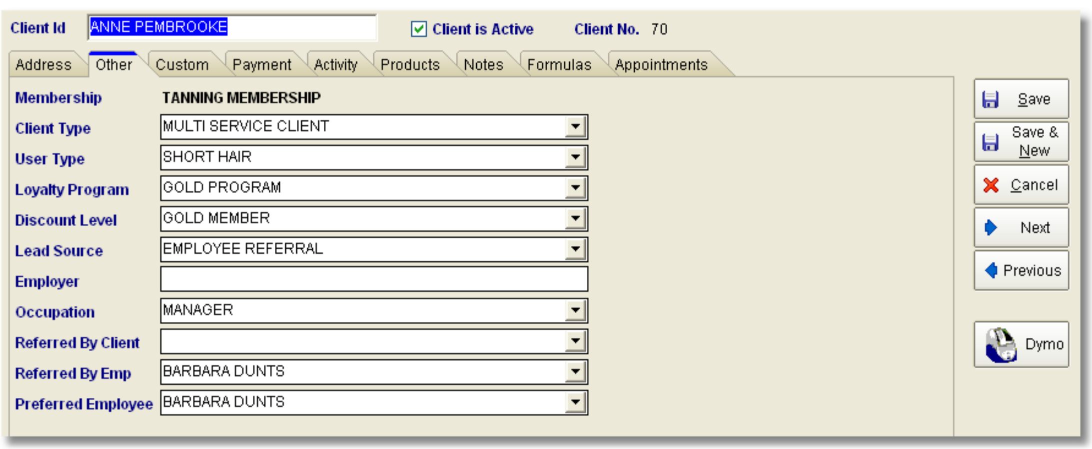
Note the "Last Update - " at the bottom right of the screen. You will see this information on nearly all of the screens. It not only tells you when the record was updated but if you are using a network, all users must log on and this area will show the User Name that updated or entered the record.

Client Is An Employee

Check this box if this client is also an employee. When this client is selected in the Point of Sale screen, the Employee Price will be applied to any items selected.

Client Other Tab

This screen allows you to enter additional information about a client that will help you to market and develop promotional campaigns among other things. By using the comprehensive reporting of Envision, you can use this screen to great advantage.



Memberships

A Membership will appear here if the Membership displayed has been sold to the selected client.

Client Type

Client Types are used to organize your clients into logical groups you may wish to target with specific advertising or promotions.

User Type

Select from the drop down list of User types. This is a list that you can create by clicking on "Client" in the menu and select "User Type List" from the drop down menu. The User Type can be used for anything that you would like to use it for. Entering types into these fields will help you with reports and filtering out clients. The User Type is sometimes used for memberships. For example, Gold member, etc.

Loyalty Program

Select a Loyalty Program for the client if you have setup a program to reward clients for purchases, trying new products, referrals or prebooking.

Discount Level

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: You may exempt any item you wish from being automatically or manually discounted. You do this using the Inventory Screen.

Preferred Employee / Lead Source

Use these fields and you will be able to report on things such as how many clients a particular salesperson 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.

Client Employer / Occupation

Some things you can do if you use these fields:

1. You have a large corporation located near your business. You wish to promote your business to the large number of employees in that corporation. You do a search of your current clients and see that "Sally" works at that corporation. You click the "Message" tab and enter a message that you are to be notified when Sally next checks in. You talk to her on her next visit and present her with some 20% off coupons for any employee of her company. She returns to work and drops them on a table in the break room. You get 12 more clients from this simple effort.

2. You would like to run a class for "non-athletic" beginners. You wish to promote the advantages your business can provide to these people. You do a report of occupations and see that 90% of your clients are in occupations that are very "Non-Physical". Perhaps you should go back to the drawing board and come up with a class that would interest those people who ARE physically active. Perhaps "Dance" to add grace and balance for athletic people. This is the basis for your new promotion!

Referred by Client

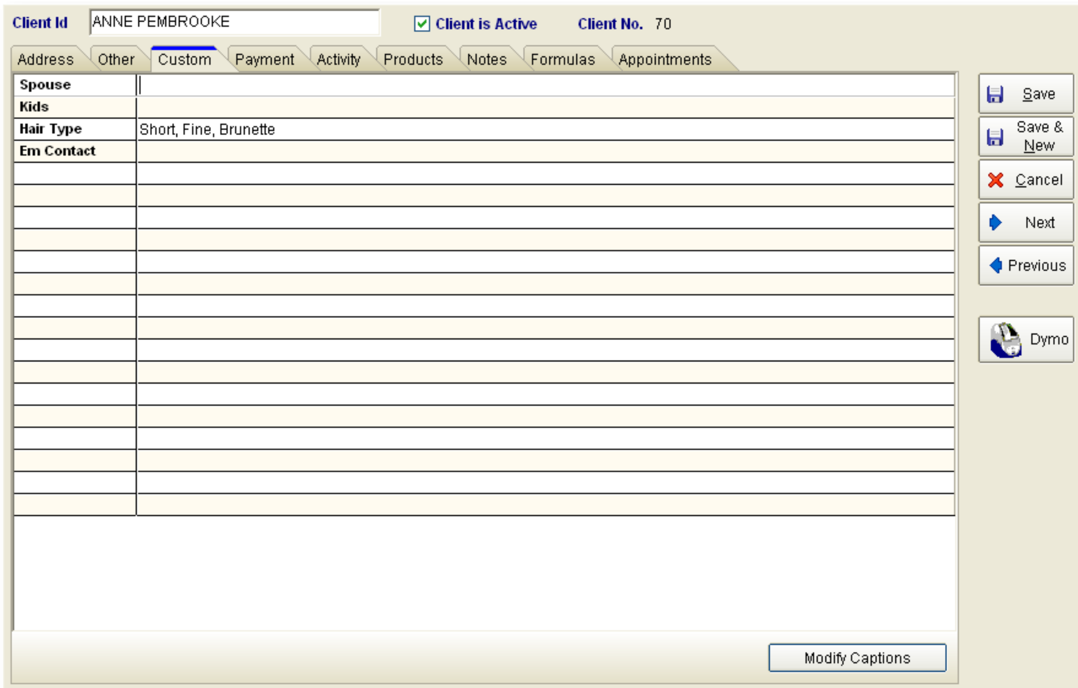
Select the client from your list of clients that referred the client that you are entering into this list.

Referred by Employee

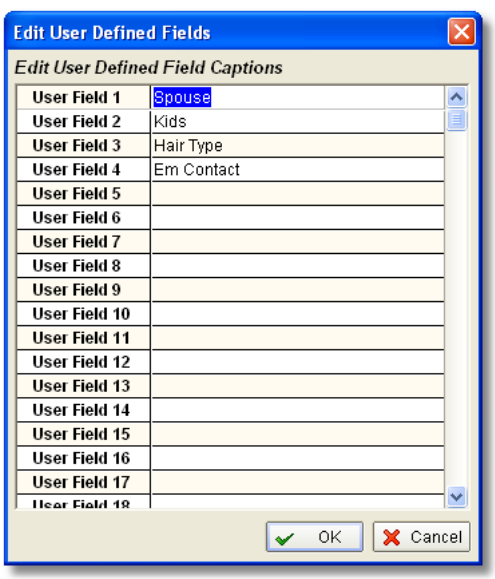
Select the employee from your list of employees that referred the client that you are entering into this list.

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. To create names for these fields, click the "Modify Custom Fields" button and enter a name for your new field. This ensures that future users of the program will enter the information you wish into these fields.



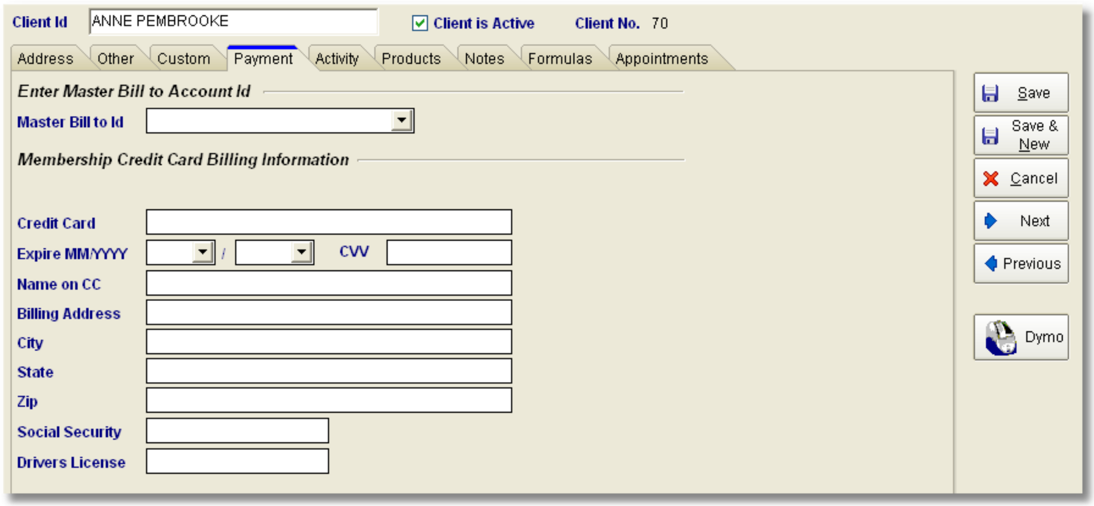
Click the "Modify Custom Fields" button and the following screen will appear.



To add a field just type the name you wish to appear and click "OK". Now this name will appear on the Client Custom Screens and you and your employees can enter the information. For example, in the space next to "User Field 1" you might want to type "Spouse Name". Then click "OK" to save this. Now when you use the program and select the Custom screen you will see a field for entering the Spouse's name.

Client Payment Tab

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



Master Billing Account

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.

Payment Type

Select the Payment type from the drop down list. 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 get 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.

Bank Routing Number

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.

Bank Account Number

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.

Account Type

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

Credit Card Information

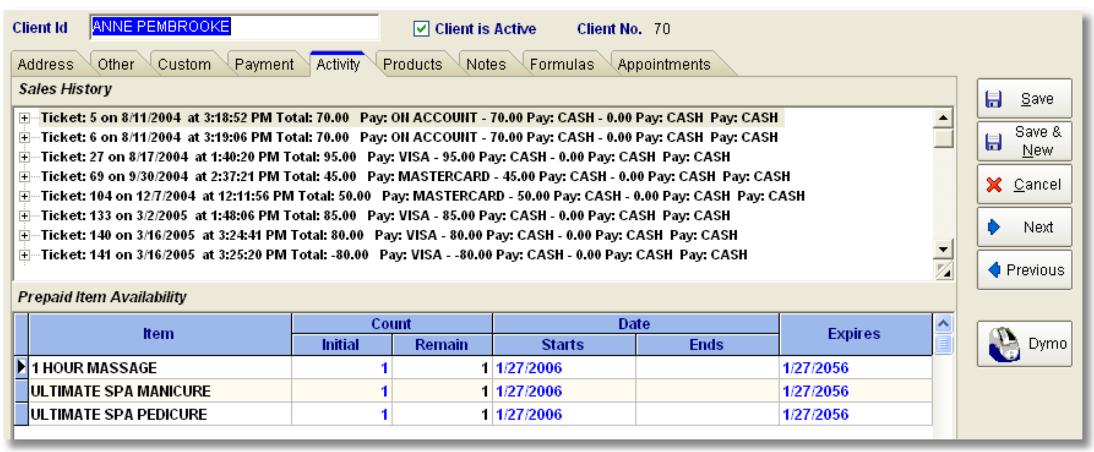
Enter the usual credit card information in the fields provided. The "CVV" field is used for the CVV code on the credit card. This is the 4 digit number on the front of an American Express card or the three digit number on the back of other credit cards.

SSN & Drivers License

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

Client Activity Tab

The Activity screen will provide you with transaction history and prepaid history.



Client Sales History

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.

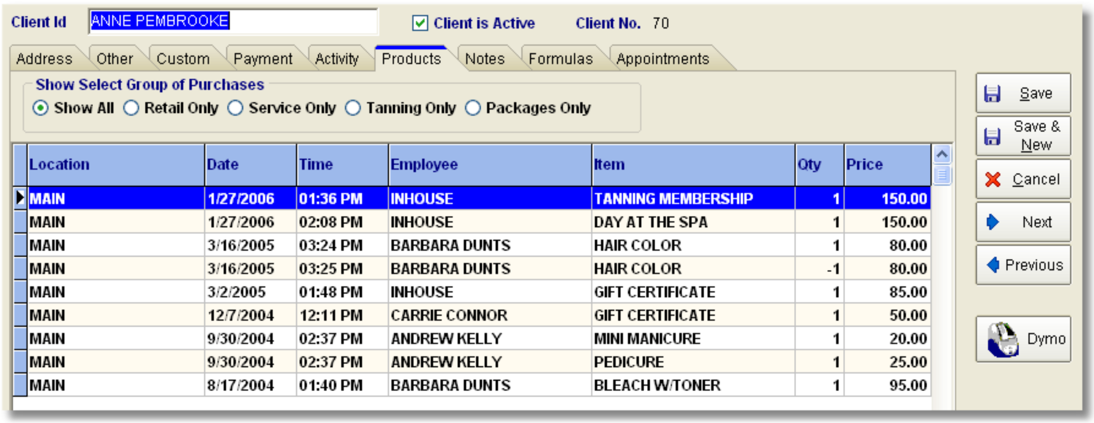
This is a useful tool to determine how "Good" a customer this is. Click the small "+" sign next to an item to display the details of the transaction.

Client Prepaid Activity

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.

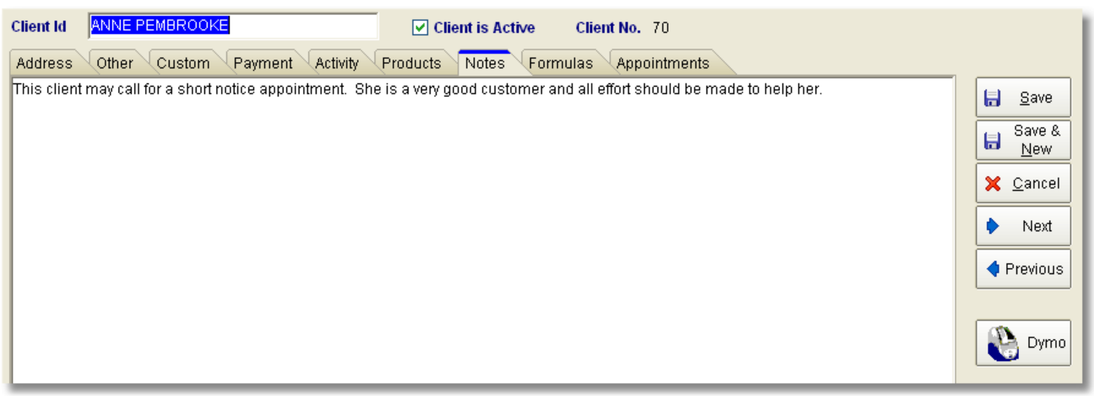
Client Products Tab

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.



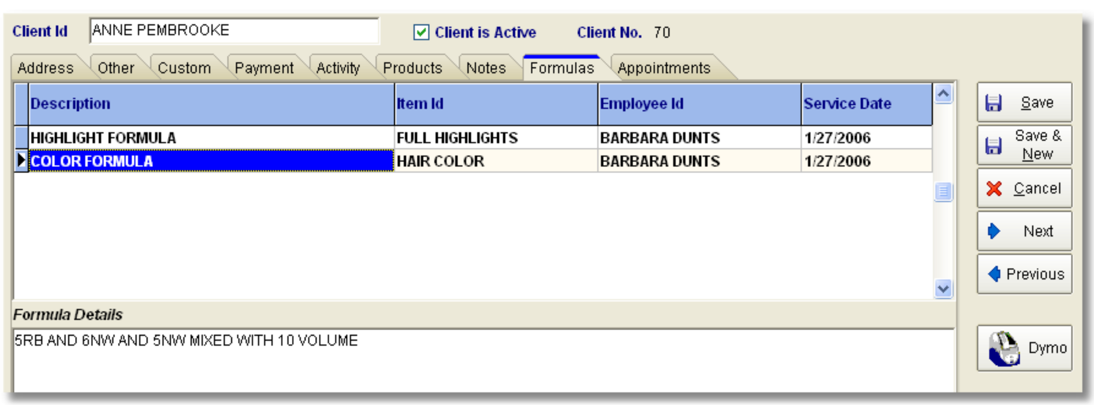
Client Notes Tab

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.



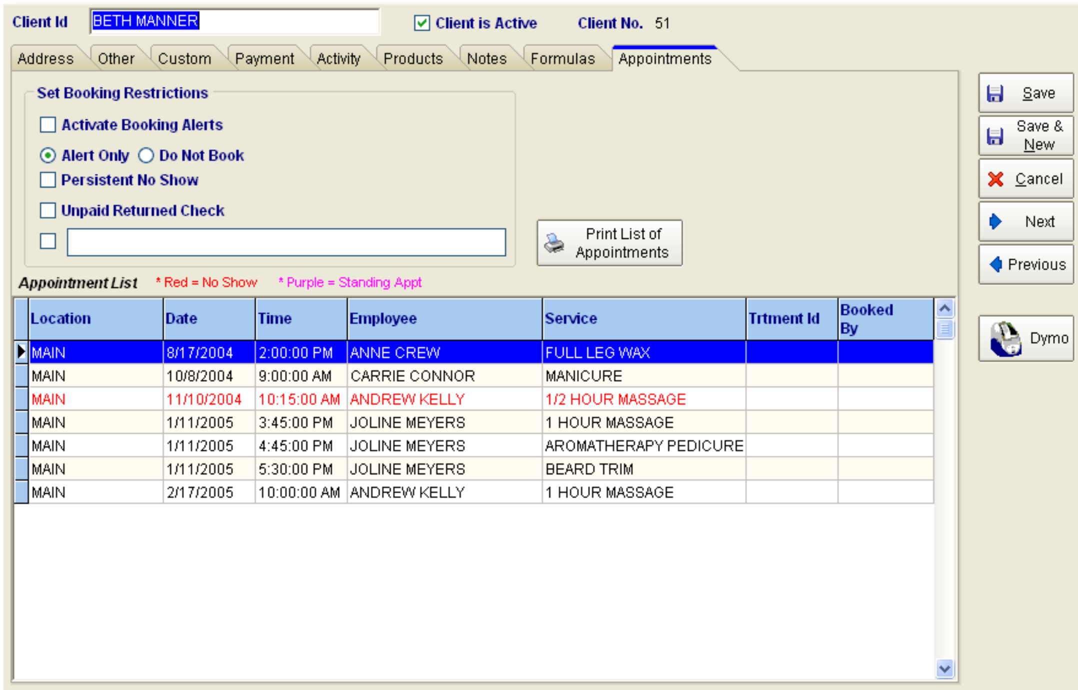
Client Formulas Tab

This screen shows all the formulas entered into the system that apply to this client. The below screen shows that the stylist keeps notes about the exact color this client likes.



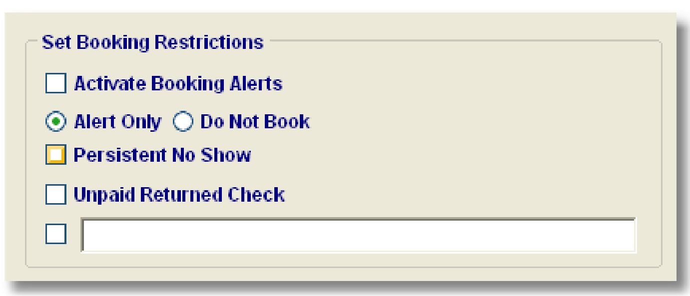
Client Appts Tab

This screen allows you to set booking restrictions for a client and also allows you to view a client's appointments for quick reference.



Booking Restrictions

This area will allow you to set booking restrictions for the selected client.



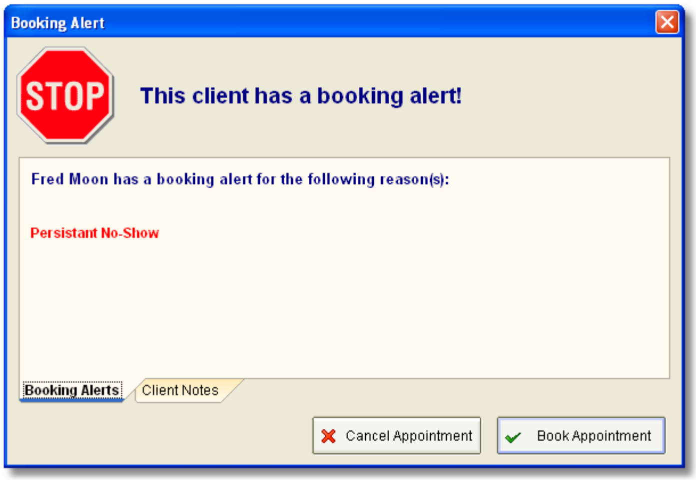
Activate Booking Alerts

Check this box if you would like an alert to pop up when you select this client for booking an appointment.

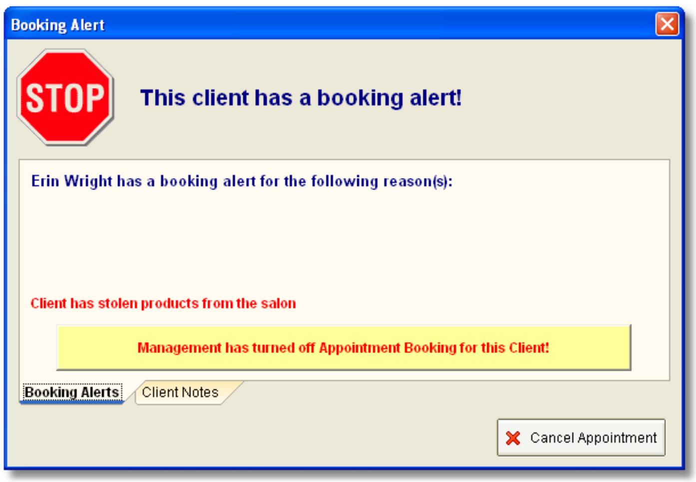
Alert Only / Do Not Book

Choose the option that you would like applied to the selected client.

When "Alert Only" is selected, you are still able to book the appointment. The following screen will appear, depending on the reason that you selected or entered for the booking alert.



When "Do Not Book" is selected, you are not able to book an appointment for this client. The following screen will appear depending on the reason that you selected or entered for the booking alert.



Persistent No Show

Select this option if the client has continuously missed their appointments. You may then decide whether or not the appointment should be booked, or if you will need to send this client an appointment confirmation. If "Do Not Book" is selected for this client, you will not be able to book an appointment with this client until this alert has been turned off.

Unpaid Returned Check

Select this option if you have received a returned check for this client and they have not paid their balance yet.

Note: The last field will allow you to enter any reason. This reason will pop up in the booking alert window when this client has been selected for booking an appointment.

Appointment List

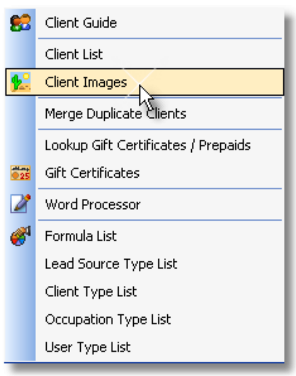
The list of appointments is useful for checking when the client's last appointment was or when the client had cancellations or No Show appointments. You may also use the colors in this list to determine whether the appointment was a No Show or Standing Appointment.

Client Images

The Client Images feature can be used for the following:

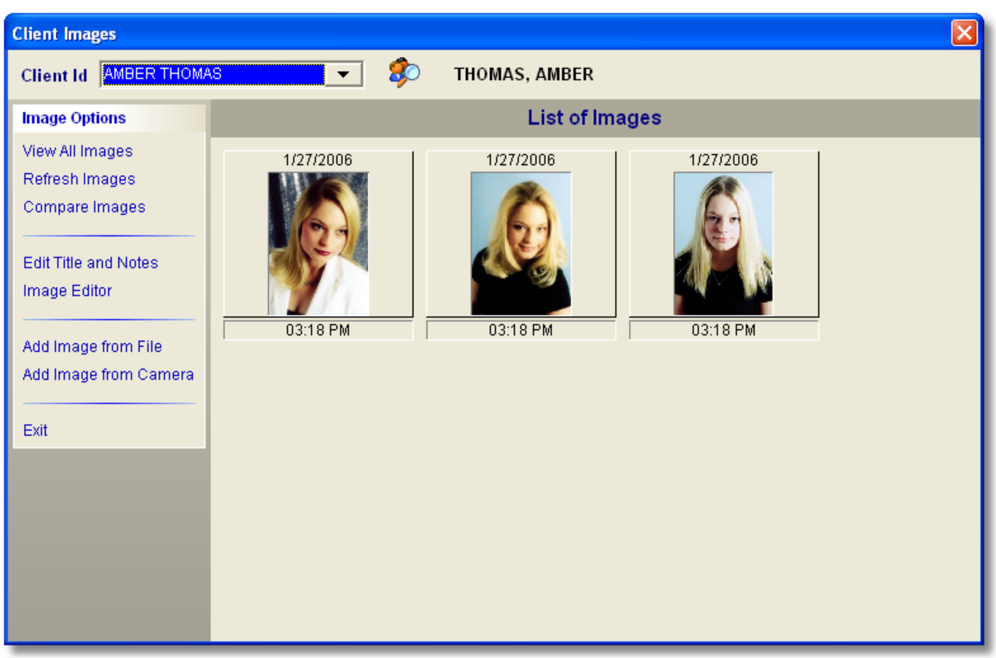
- View all Images for a client
- Compare "Before and After" images
- Edit Images
- Add images from a camera or a location on your computer
- Take pictures with a camera connected to your computer

The Client Images window can be reached by clicking on "Client" on the Menu Bar and selecting "Client Images" from the drop down menu. This screen can also be reached from the Appointment Calendar and from the Client List by clicking on the "Image Library" button on the "Address" tab of an open client file.



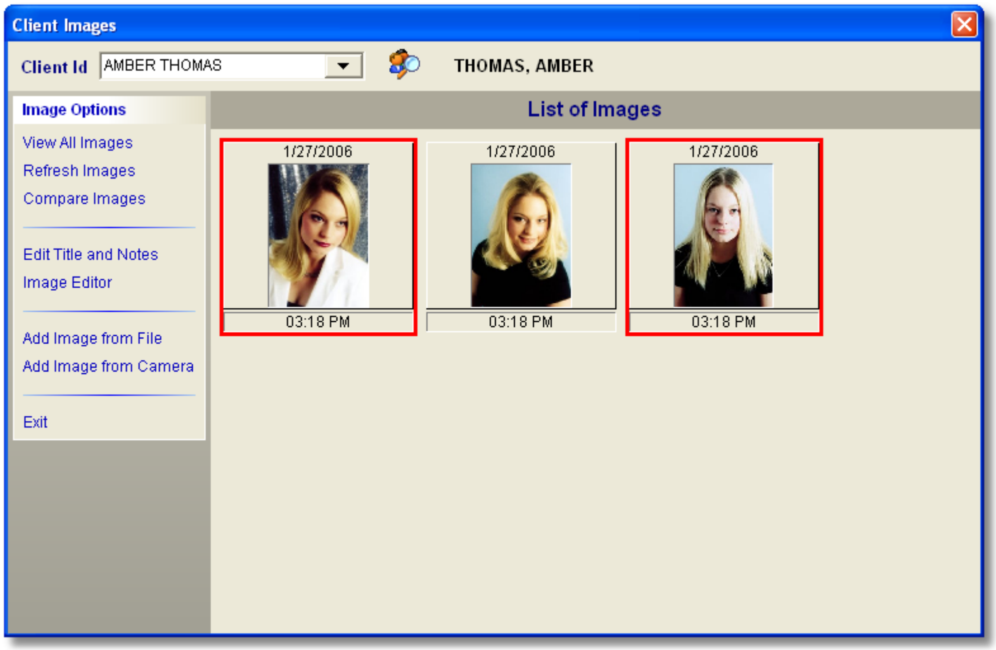
View All Images

When a client that has images in their file, the following screen will appear displaying all of their images.

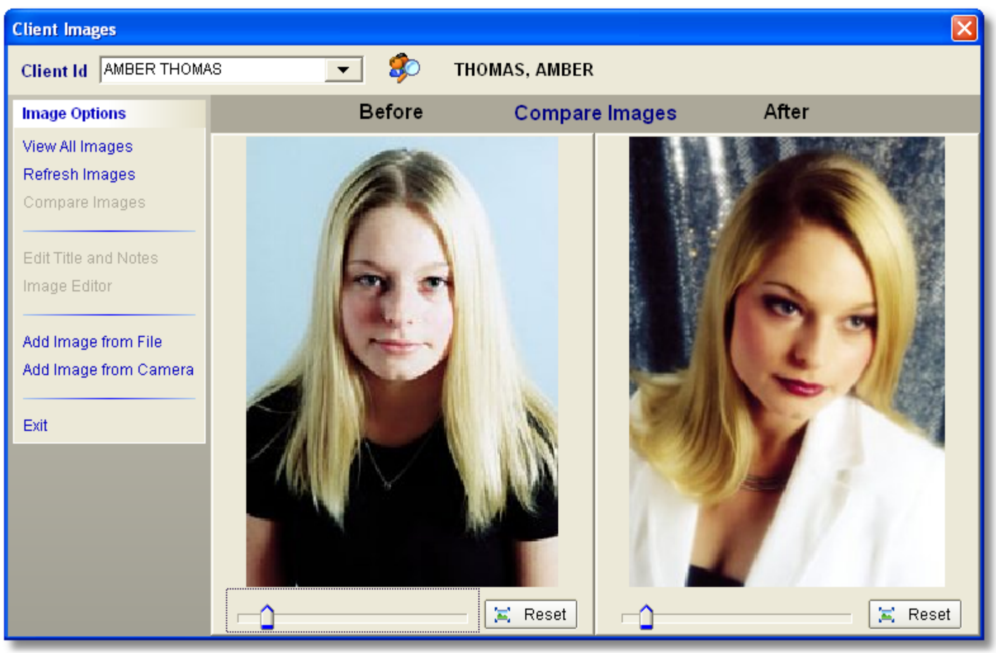


Compare Images

If you would like to compare images, hold down your Ctrl key on your keyboard and left click on two of the images that you would like to compare. The two images will be outlined in red as shown in the image below:



Click "Compare Images" under the Image Options on the left to closely view the two images you have selected.

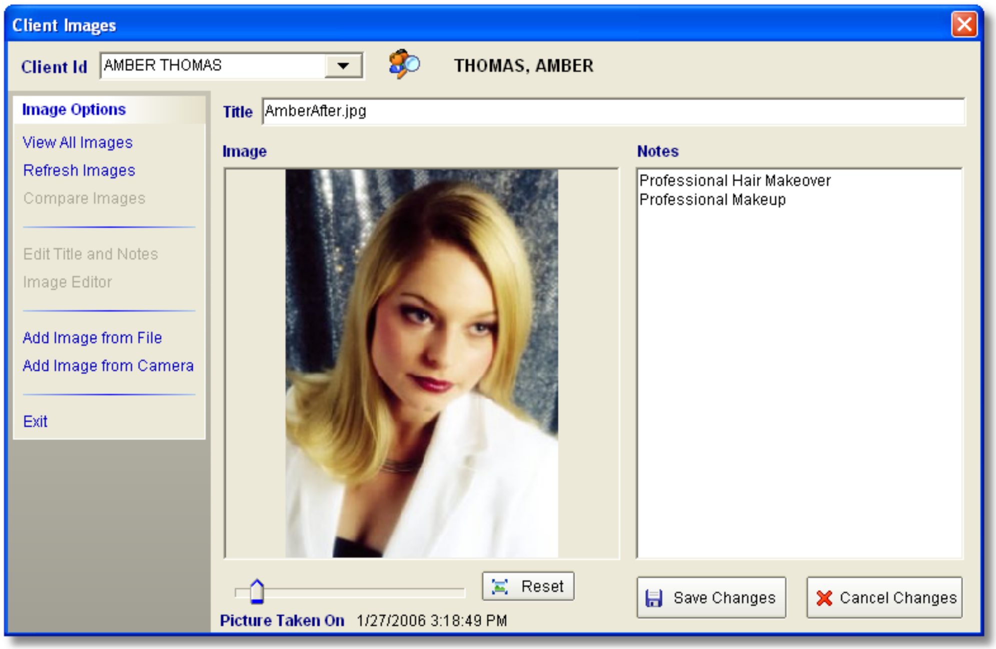


The bars below each image allow you to zoom in to the picture to view them more closely.

Click "Refresh Images" under Image Options on the left to view all images for the selected client once more.

Edit Title and Notes

The "Edit Title and Notes" option allows you to change the file name and add or edit notes for the selected image.

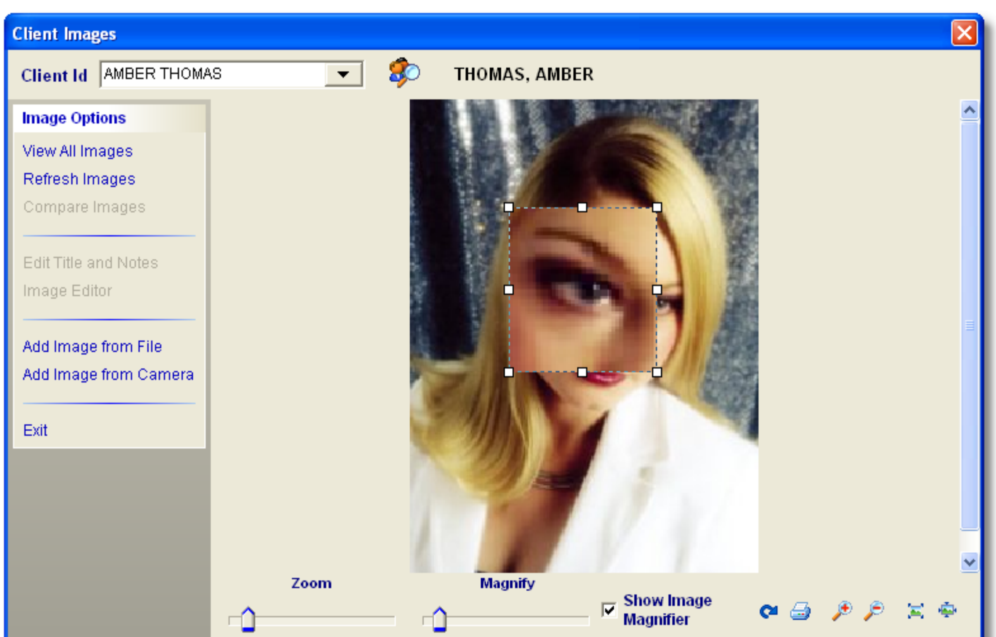


Click the "Save Changes" button to save the information that you have added or edited on this screen.

You may click "Refresh Images" under Image Options to view all the images for the selected client.

Image Editor

Click "Image Editor" under Image Options to zoom into a picture and magnify specific areas of the image.



The tools on the right allow you to print the image, zoom in and out of the image, and view the image at it's smaller size or full size.

Adding Images

Add Image from File

Select this option, located under Image Options on the left, to select an image from a location on your computer. If you are using a digital camera or scanner, you may have saved your images in a folder on your computer. You may also select an image from a digital camera if you have one connected to your computer. Browse to the location and select the image that you would like to add for the selected client.

Add Image from Camera

You may use this feature if you have a camera that is capable of taking pictures while being connected to your computer. A web camera can be used with this feature.

Video Source

Select the Video Source with the drop down menu or click the "Rescan Devices" button to search for the device that is connected to your computer.

Take Photo

You will see the image in the window above this button after selecting your video source. When you are ready to take the picture, click this button.

Save Photo

If you are satisfied with the image, click this button to save the new image.

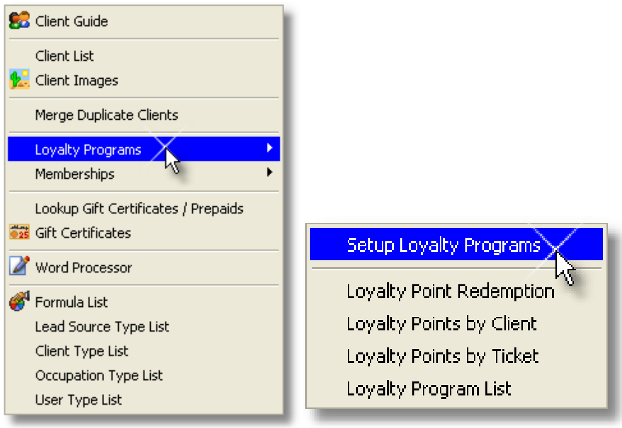
Enter Notes

Enter notes if necessary for the image you are saving.

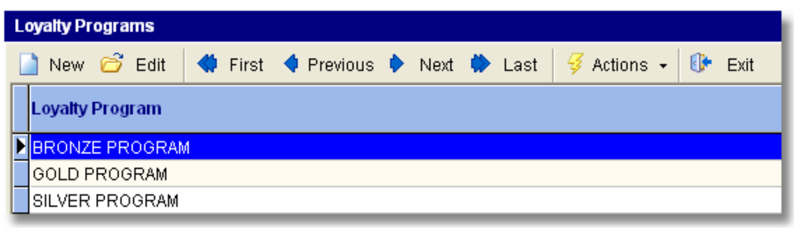
Click "Exit" under Image Options on the left to close the Client Images window.

Loyalty Programs

Loyalty Programs is a new feature of Envision that allows you to reward your clients for purchases, trying new products, referrals and prebooking. Loyalty Programs can be setup by clicking on "Client" on the Menu Bar and selecting "Loyalty Programs" from the drop down menu.



A list of Loyalty Programs will appear. This list may be empty if you have not yet created a Loyalty Program.

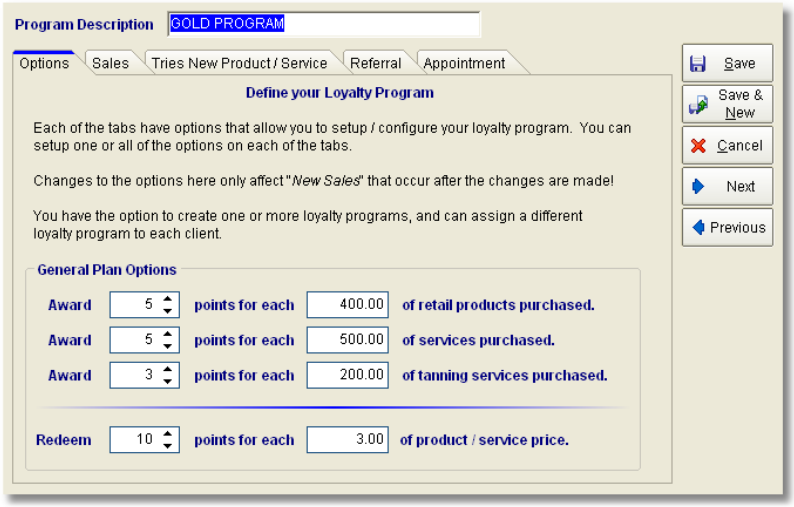


Options Tab

Each of the tabs have options that allow you to setup / configure your loyalty program. You can setup one or all of the options on each of the tabs.

Changes to the options here only affect "New Sales" that occur after the changes are made!

You have the option to create one or more loyalty programs, and can assign a different loyalty program to each client.

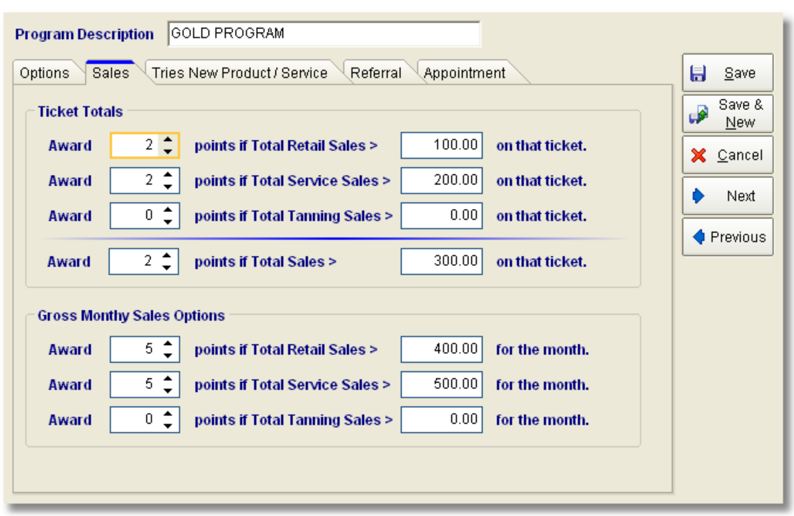


General Plan Options

- **Retail Products purchased:** Set points to award for a specified dollar amount of retail products purchased.
- **Services Purchased:** Set points to award for a specified dollar amount of services purchased.
- **Tanning Services purchased:** Set points to award for a specified dollar amount of tanning services purchased.
- **Redeem points for each dollar amount of product / service price:** Set the amount of points a client can redeem for the dollar amount specified.

SalesTab

Use this tab to specify an amount of points to reward for Ticket Sales and Gross Monthly Sales.



Ticket Totals

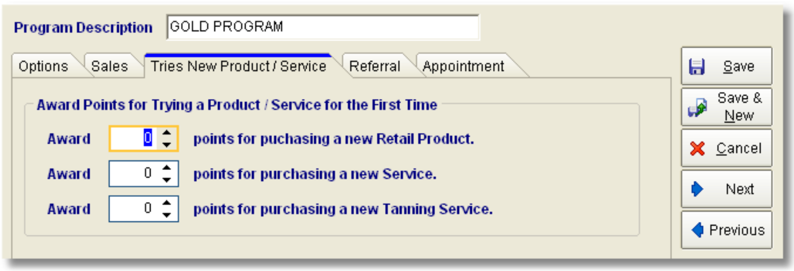
Use this area to award points for Total Retail Sales, Total Service Sales, Total Tanning Sales and/or Total Sales on a ticket (transaction).

Gross Monthly Sales Options

Use this area to award points for Gross Monthly Sales totals for Retail Sales, Service Sales and Tanning Sales.

Tries New Product / Service Tab

You may use this screen to award points for trying new products.

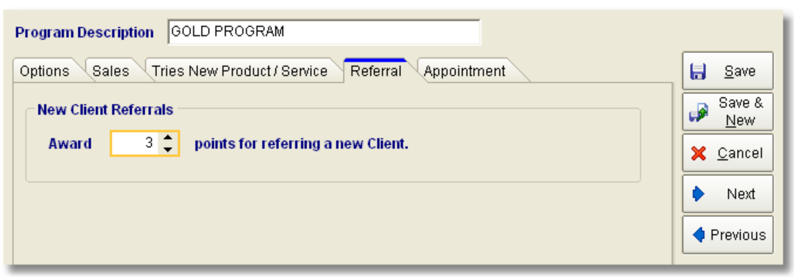


Trying a Product / Service for the First Time

You may enter an amount of points that will be awarded to a client for trying a new Retail Product, Service and/or Tanning Service

Referral Tab

This screen can be used to award points to a client for referring a new client.

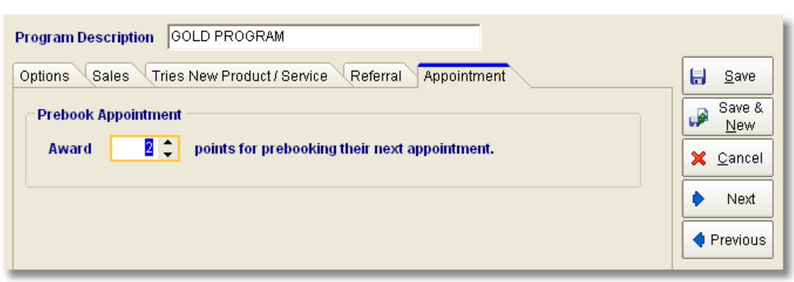


New Client Referrals

Enter an amount of points that will be awarded to a client each time they refer a new client.

Appointment Tab

The Appointment Tab can be used to award clients for Prebooking appointments.

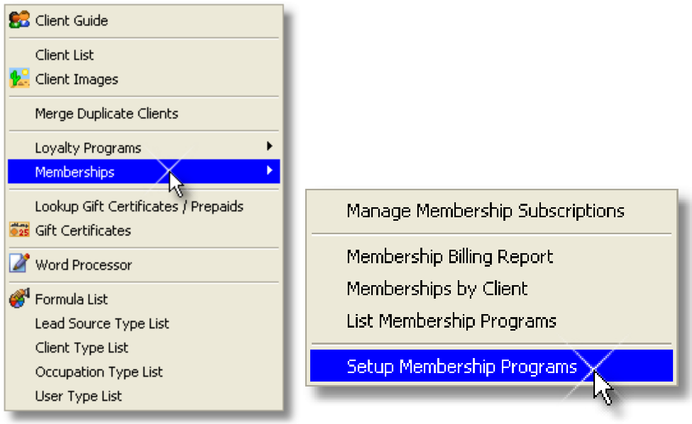


Prebook Appointment

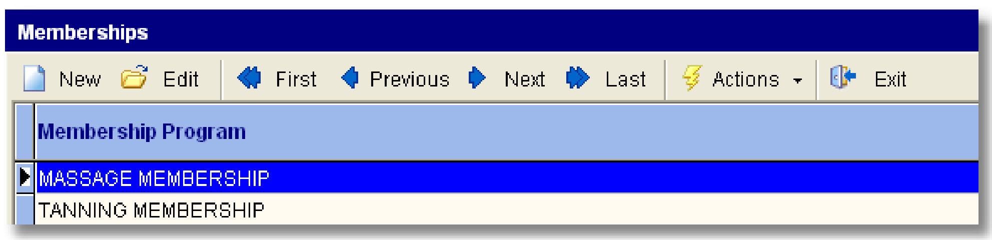
Set an amount of points to reward a client each time they prebook their next appointment.

Memberships

Memberships is a new feature of Envision that will allow you to sell Memberships to your clients. Memberships can be setup by clicking on "Client" on the Menu Bar, selecting "Memberships" and "Setup Membership Programs".

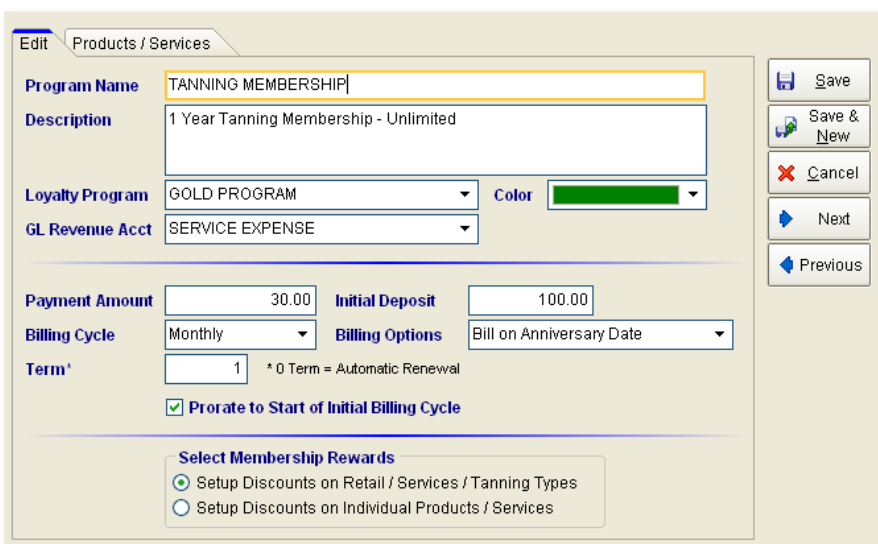


A list of Memberships will appear. This list may be empty if you have not yet created a Membership Program.



Edit Tab

This screen is used to setup the Membership Program.



Program Name

Enter a name for the Membership Program.

Description

Enter a description for the Membership Program.

Loyalty Program

You may select a Loyalty Program for this Membership if you would like the clients that have purchased this Membership on a specific Loyalty Program.

GL Revenue Acct

If you have accounts setup in the program, you may associate this Membership Program with a specific GL Revenue Account.

Payment Amount

Enter the amount that the client will be charged at each Billing Cycle.

Initial Deposit

Enter the amount that the client will be charged when they purchase the Membership.

Billing Cycle

Select how often the client will need to pay for this Membership.

Billing Options

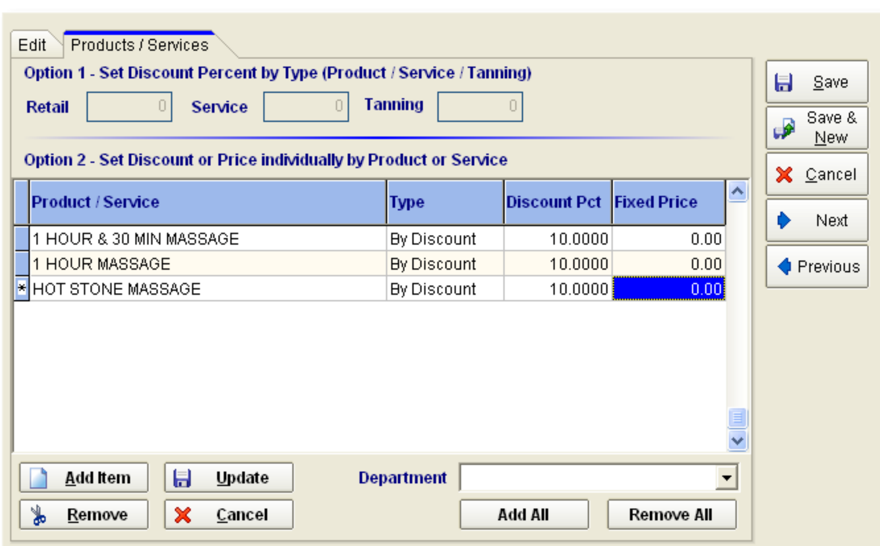
Select from the drop down menu the Billing Option you wish to use.

Select Membership Rewards

Select one of the options here. You may setup discounts on Retail / Services / and Tanning Types or you may may setup discounts on specific products and/or services.

Products / Services

Use this screen to setup a Discount Percent by Type (Product / Service / Tanning) or set a discount or specific price for individual products and/or services.



Option 1 - Set Discount Percent by Type (Product / Service / Tanning)

Set a discount percent by the type of item. Enter the percent as a whole number in the field to the right of the type you would like to set the discount for.

Option 2 - Set Discount or Price individually by Product or Service

Set a Discount Percent or Fixed Price for individual products depending on the type you select

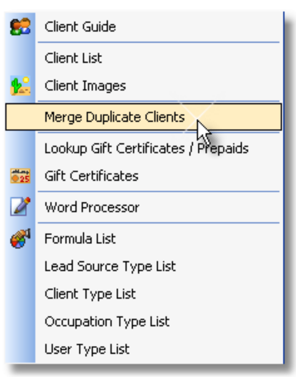
Department Selection

Select a department here to add all of the items from a department to the list. Click the "Add All" button after selecting the department. You may also remove all of the items from a department by selecting the department and clicking the "Remove All" button.

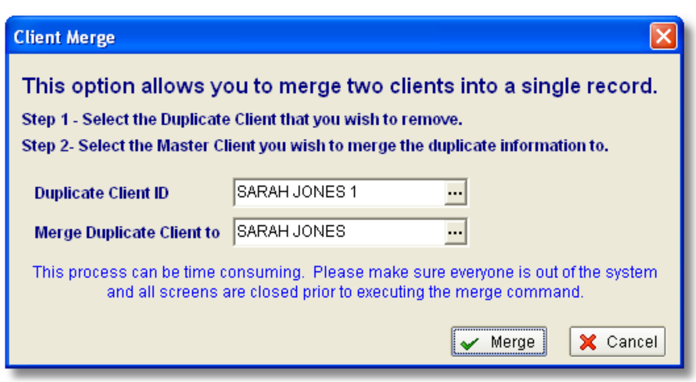
Merge Duplicate Clients

This feature allows you to combine multiple client files into one client file. For example, if you have two Client Id's entered for one client, you may merge one of the Id's with the other so that all of their activity, sales and appointment history is in one file.

To select the "Merge Duplicate Clients" option, click on "Client" on the Menu Bar and select "Merge Duplicate Clients" as shown in the image below.



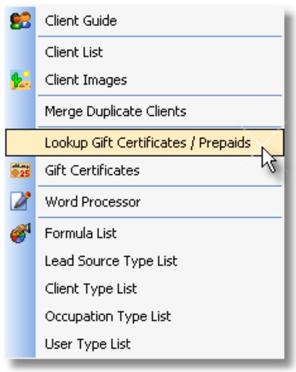
The following screen will appear, allowing you to merge two clients into a single record. Select the Duplicate Client that you would like to remove and then select the Master Client that you would like to merge the duplicate information to. Click on the "Merge" button after selecting the Duplicate and Master Client ID's.



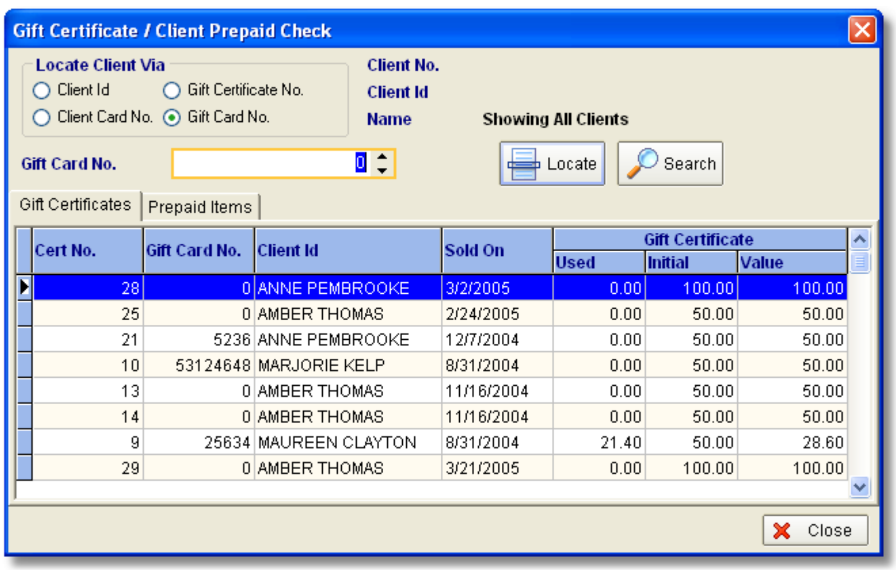
Lookup Gift Certificates / Prepaids

Use this feature to locate clients with either gift certificates or prepaid items that are available for use.

This screen can be reached by clicking on "Client" on the Menu Bar and selecting "Lookup Gift Certificates / Prepaids" as shown in the image below. You may also click on the "Lookup" button, located on the Tool Bar to open the following screen:



The following screen will appear:



Lookup Via

Select which item you wish to use for looking up a client. This will depend upon what information you have available when the client arrives.

Lookup Text Field

Enter the information that applies to what you selected to use for lookup. This field title will change depending upon your selection in the Lookup Client Via fields. Click the Lookup button after entering the information.

Locate and Search Buttons

If you entered data into the lookup field, click the lookup button and only those clients or single client that match the information you entered will appear. Simply highlight the correct client and click OK.

If you don't have any information for lookup, click the search button and you will be presented with the client list that you can use to sort and browse to find the client.

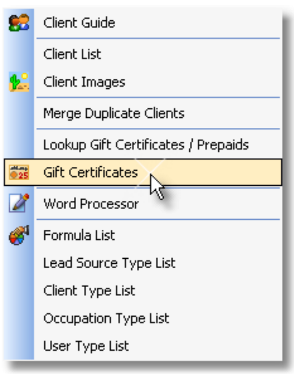
Lookup Gift Certificate / Prepaid Items

Click the tab that is applicable to what you are looking for. The information that applies will be presented.

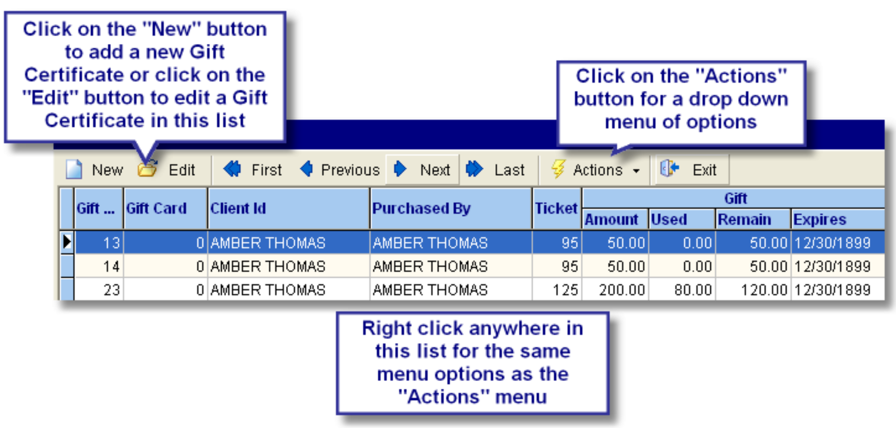
Gift Certificates

This feature allows you to manually enter a gift certificate as well as make changes to gift certificates if needed. You may also lookup information about the usage of a gift certificate.

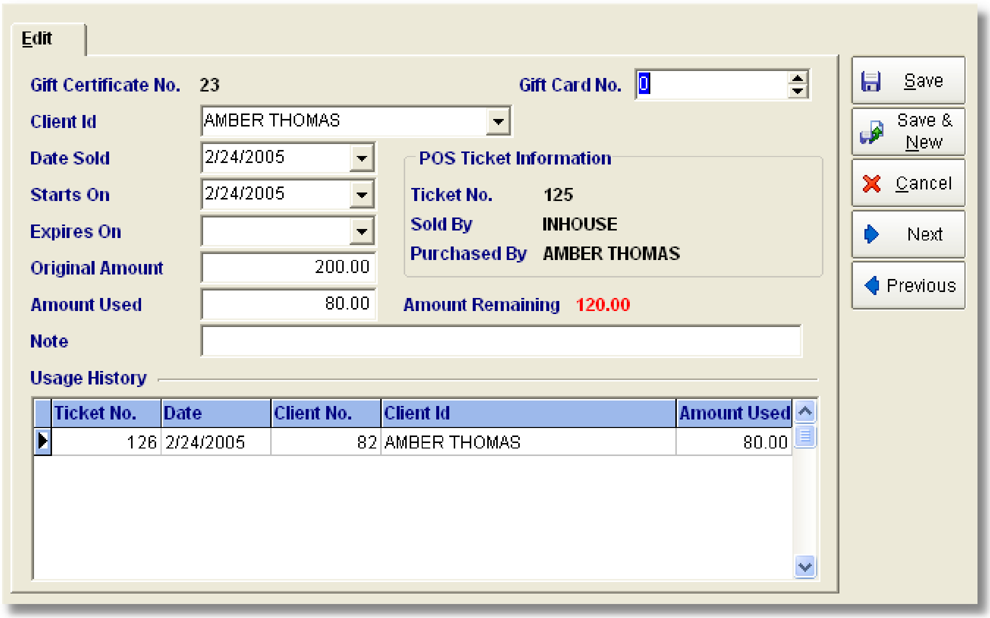
To enter the Gift Certificate list, click on "Client" from the menu bar and select "Gift Certificates" as shown in the images below.



A list of gift certificates that have been entered and sold through the program will appear. The following screen is an example of what the Gift Certificate List will look like.



The following screen will appear when you select either "New" or "Edit" from the Gift Certificate List:



Gift Certificate No.

This is the number that is assigned by the program to each new gift certificate entered or sold in the program.

Gift Card No.

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.

Gift Certificate Client ID

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.

Gift Certificate Dates

- **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.

Gift Certificate Amounts

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

POS Ticket Information

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

Amount Remaining

This area will show the amount remaining that can still be used.

Gift Certificate Note

Enter a note for this gift certificate if needed.

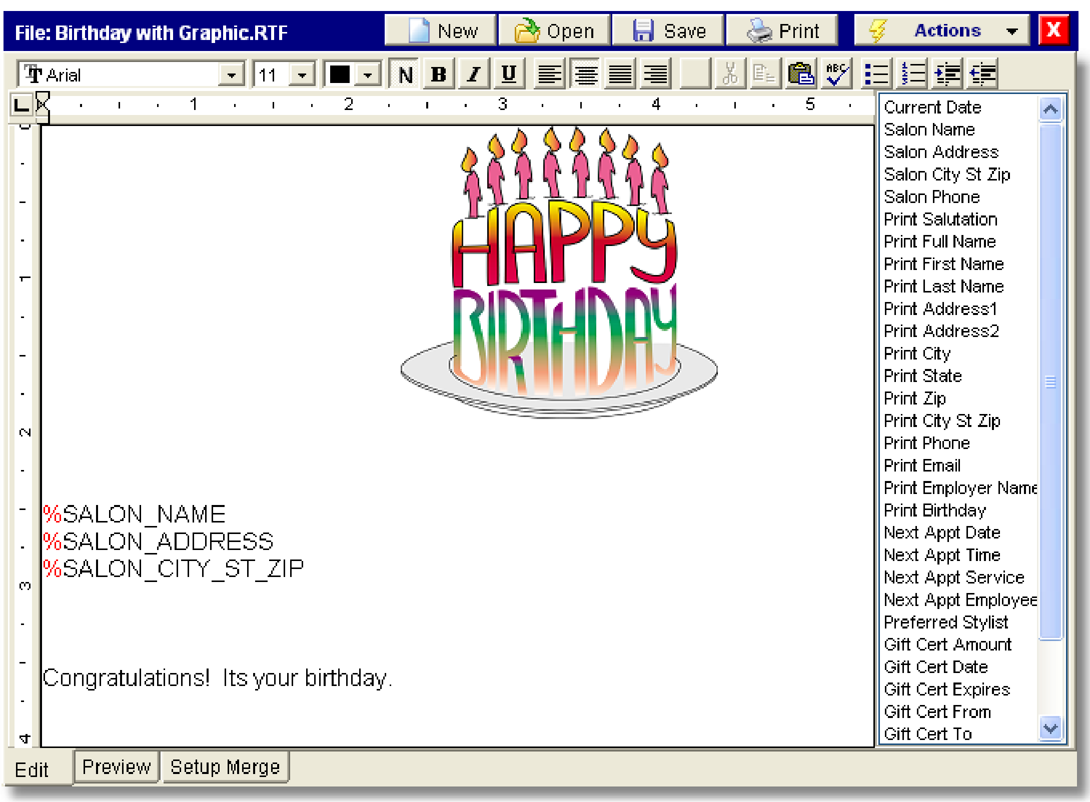
Usage History

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

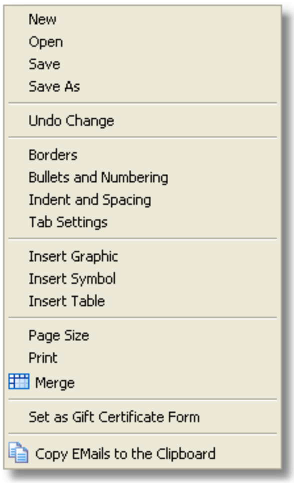
Word Processor

Selecting "Word Processor" on the "Client" menu will bring you to this handy word processor that will insert information into a document you create, stored in the program. While not as comprehensive as a major word processing program, all the essentials are included. The buttons are standard to all word processing programs.

The extremely easy to use Merge feature allows you to create a template document (like the one shown in the screen shot below) and when printed it will automatically insert your salon information and the client information.



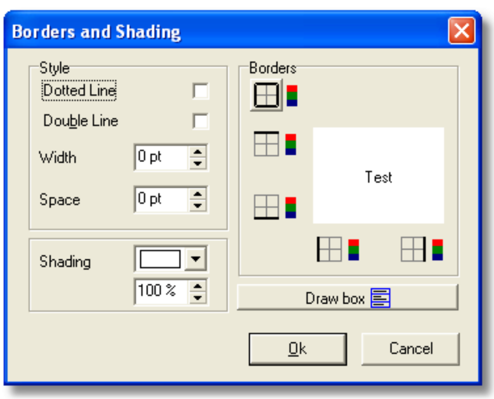
Actions Menu



- **New / Open / Save / Save As:** Select these choices for the standard windows actions. The first 3 are duplicated with buttons at the top of the Word Processor screen.

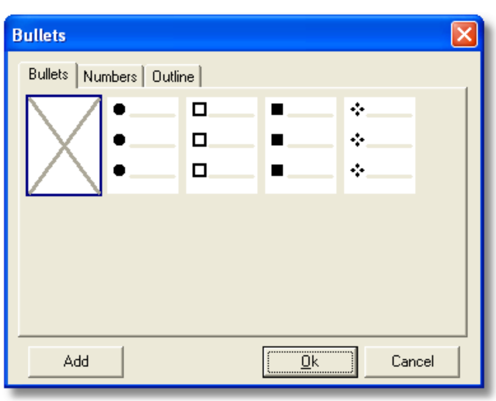
- **Undo Change:** Select this choice to undo the last change you made. This is a very handy choice.

Borders and Shading:



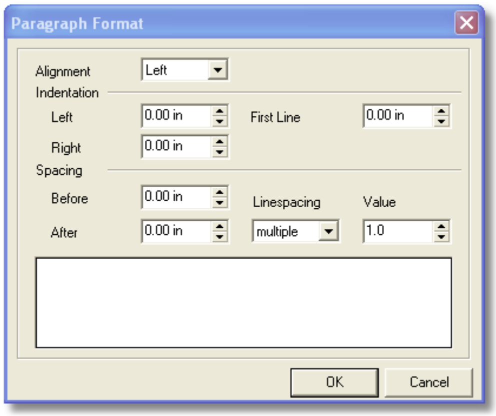
Select the text first then the items you choose here will be applied to that text.

Bullets / Numbers / Outline:



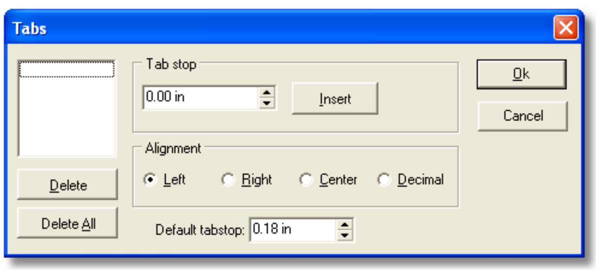
Select the type of bullets, numbers or outline options for the text you have selected.

Indent and Spacing:



The choices you make here will apply to the paragraph you have your cursor located.

Tabs Settings:



These settings will apply to the entire document. A common setting for default would be to enter 0.05 into the "Default tabstop" and then press "OK".

- **Insert Graphic / Symbol / Table:** Select these choices to insert into your document at the cursor position, a graphic (picture - either a .bmp or .jpg). Symbols from the various character sets you have installed on your computer, such as the copyright symbol. Or you may insert a Table where you select the number of Rows and Columns, Alignment, etc.

- **Page Size / Print:** Select the Page Size to set the size of paper you are printing on. You also select the margins and whether to print in Portrait or Landscape.

- **Merge:** This option allows you to setup filters for the clients that you would like to send your document to. You may then merge the client information into the document and print the letters or you may merge and email the letters to your clients.

- **Copy Emails to Clipboard:** This choice will parse through your customers (with filtering) and extract their email address's to the clipboard. You can then paste them into your email program.

Font Type and Style

These three fields allow you to select,

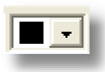
- **Font Style:**

Arial, Times New Roman, etc. Only fonts you have installed on your system will be displayed.

- **Font Size:**

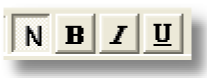
Font size is given in "Points". 11 points is approximately between the old typewriter Elite and Pica and is the most common size. Note that different styles of fonts will have different sizes.

- **Font Color:**



Select the color you wish for the text. You may drag across certain parts of your letter and color only those parts. Of course, you must have a color printer to see this.

Font Attribute



These 4 buttons will change the appearance of the text.

B = Bold, I = Italic, U = Underline. Click the "N" button to change the text back to normal.

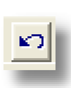
You can click one of these buttons and start typing new text with the attribute in effect, or you may drag your mouse arrow across text so that it is highlighted and then click an attribute button to change that text only.

Text Alignment

Click one of these four buttons to align your text in different ways. In order from left to right the buttons:

- **Left** align, ragged right
- **Center**, this is what we used for the heading of the sample letter.
- **Justified**, both sides aligned
- **Right align**, ragged left

Undo Button



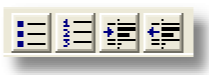
Click this button to undo the last action you made. You may also use the keyboard shortcut, "Ctrl" + "Z".

Manipulate Text Buttons

These three buttons will move the text around the letter.

- **Cut:** Remove to the clipboard the highlighted text.
- **Copy:** Copy to the clipboard the highlighted text.
- **Paste:** Place the text on the clipboard into the location of the cursor.
- **Spell Check:** Click this button to run the spell check feature.

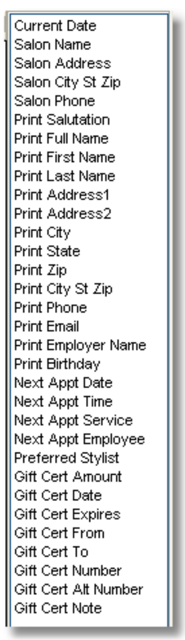
List Buttons



These four buttons will make portions of your text stand out.

- **Bullets:** Click this button to indent and place small dots in front of each item.
- **Numbers:** Click this button to indent and sequentially number each line. This is what we did in the middle of the sample letter.
- **Increase Indent:** Click this button to move the highlighted text further to the right.
- **Decrease Indent:** Click this button to move the highlighted text further to the left.

Merge Field List



This is the list of fields available to insert into your letter.

Place the cursor on the location in your letter to insert the field, then double click the field and it will be instantly placed in that location. Don't forget to place spaces after fields that follow each other.

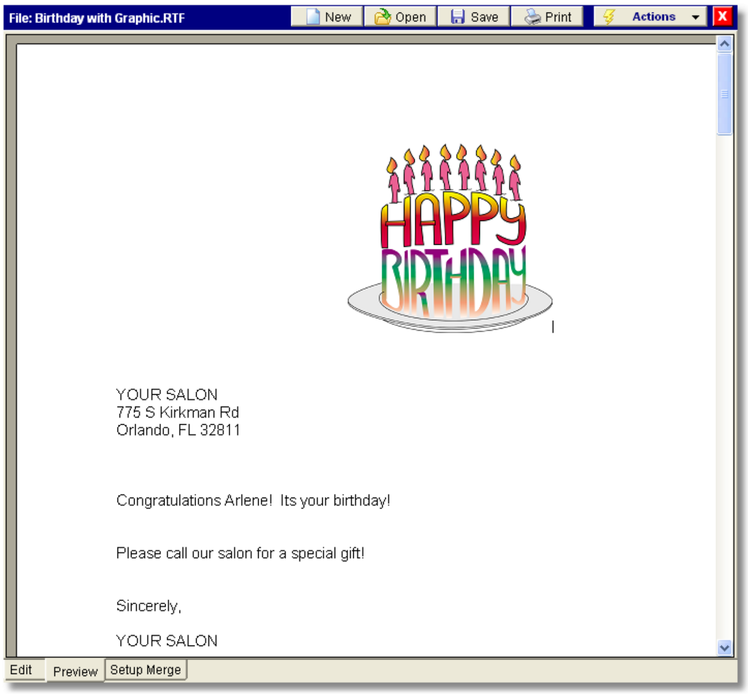
For example if you insert the field "Member Salutation" (Mr. Mrs., etc) and then double click "Member Last Name" to insert it, your final letter will look like this: Mrs.Jones.

However, if you insert "member Salutation" then press the space bar, then insert "Member Last

Name", it will look like this: Mrs. Jones, which is correct.

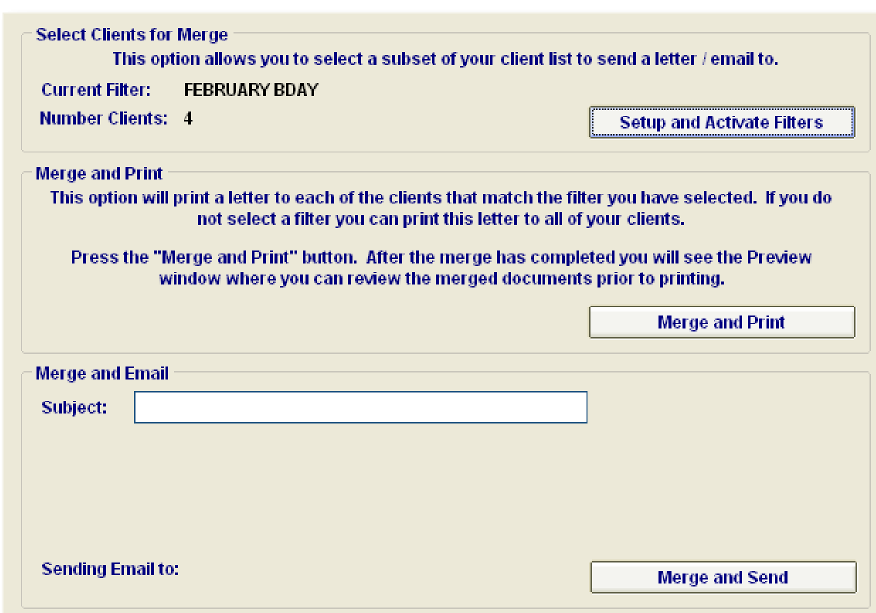
Preview Tab

Click the Preview button to view a preview of the document with the merged information. The preview screen will look similar to the following screen shot:

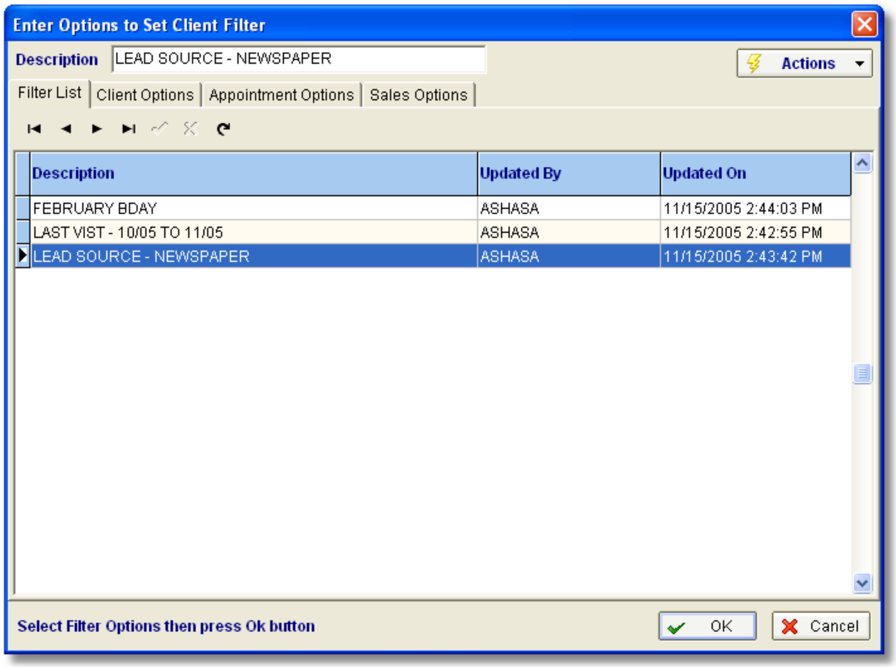


Setup Merge

This screen allows you to setup filters for the clients that you would like to send your document to. You may then merge the client information into the document and print the letters or you may merge and email the letters to your clients.

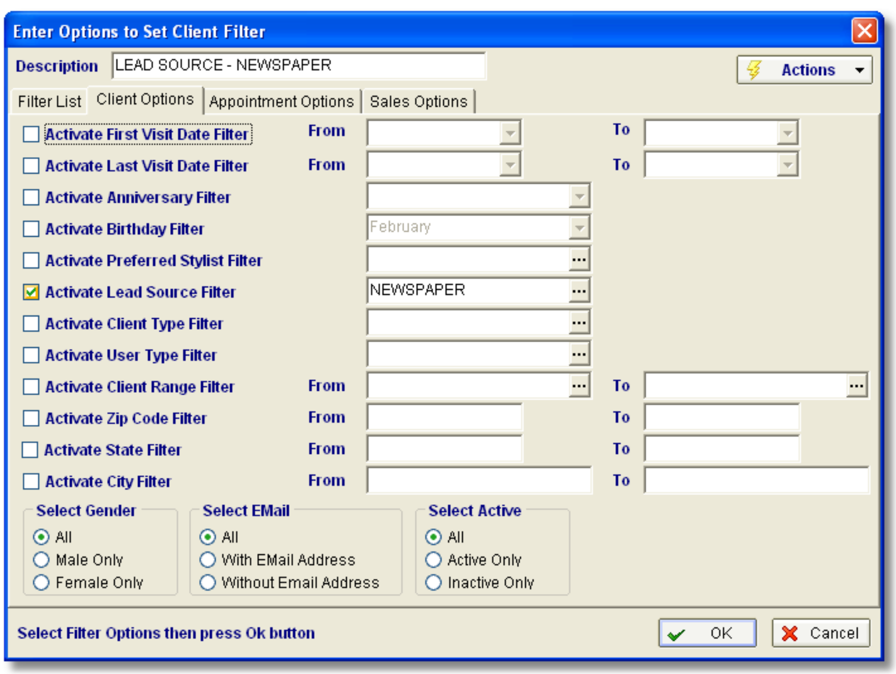


Setup and Activate Filters



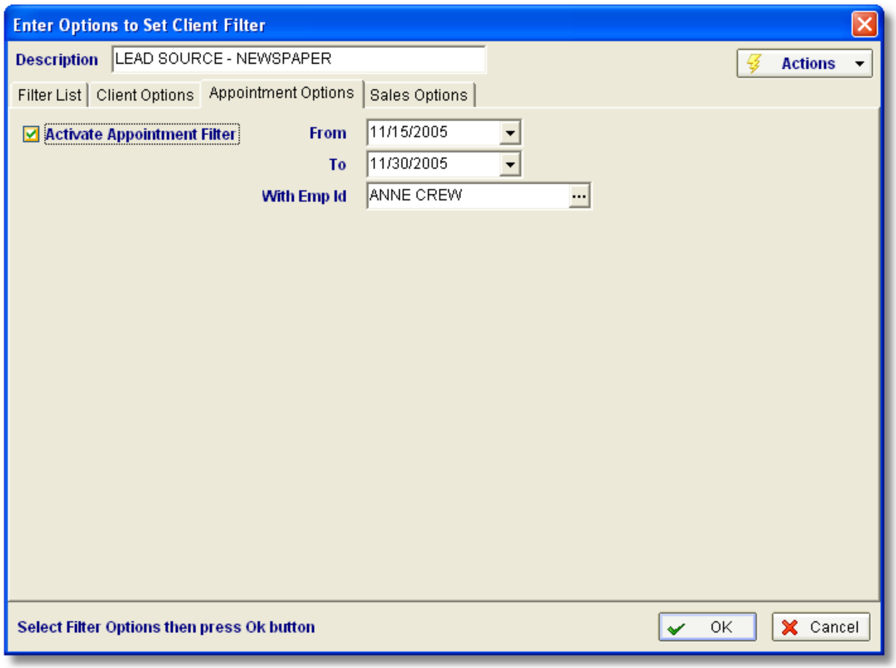
This area of the screen shows all the filters you have created. Double click one to select it for the current operation.

Filter - Client Options



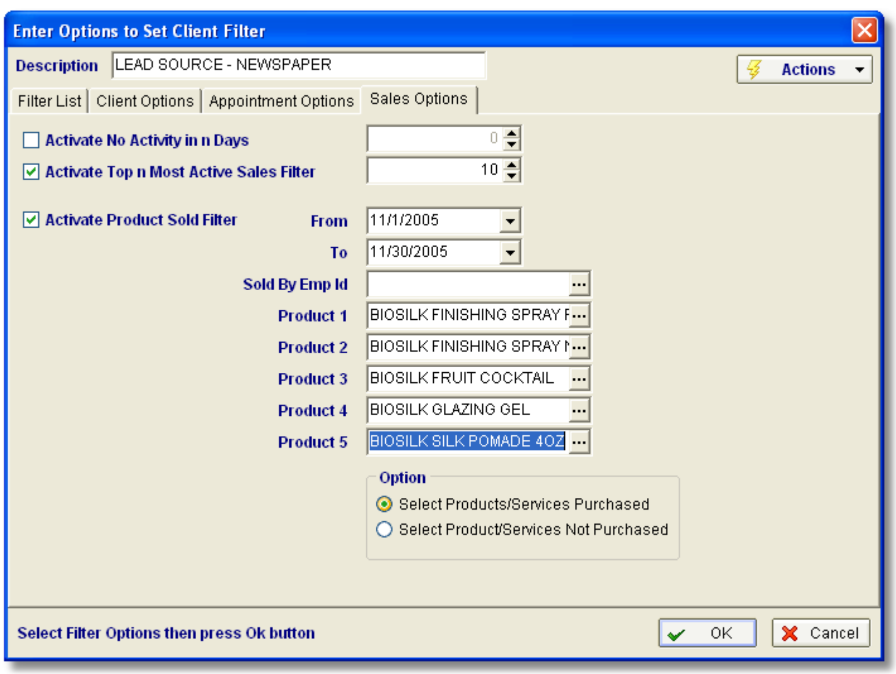
Use this screen to select various parameters about the clients. Select the type of filter you would like to activate and then set the ranges or selections for the filter. If you are only setting one filter, make sure that you do not have any other filters activated on any of the filter screens.

Filter - Appointment Options



Use this screen to select clients for their appointment activity.

Filter - Sales Options



Use this screen to select clients for their sales activity.

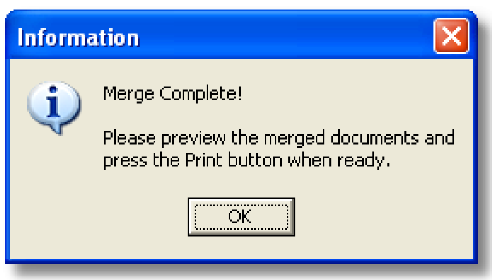
Merge and Print / Email

Merge and Print

Click the Merge and Print button to preview the document you will be sending to the clients that you filtered out or to all of your clients. If you have not setup any filters, you will receive the following message:

Click the "OK" button to send the document to all of your clients, or click the "Cancel" button to set a filter.

If you have set a filter, the program will jump to the "Preview" screen and you will receive the following message:



Click the "Print" button at the top of the Preview screen to print your documents.

Merge and Email

Click this button to merge the client information with your document and email this to the email address available for your clients.

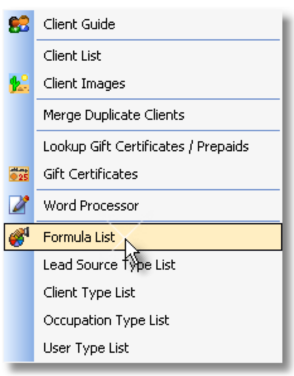
Email Subject

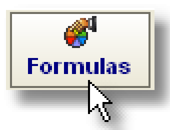
Enter a subject for this email that describes the email you are sending to your clients.

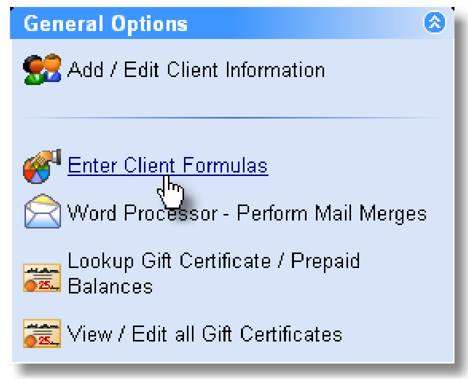
Formula List

The Formula feature saves the instructions for custom mixing products to satisfy a particular client.

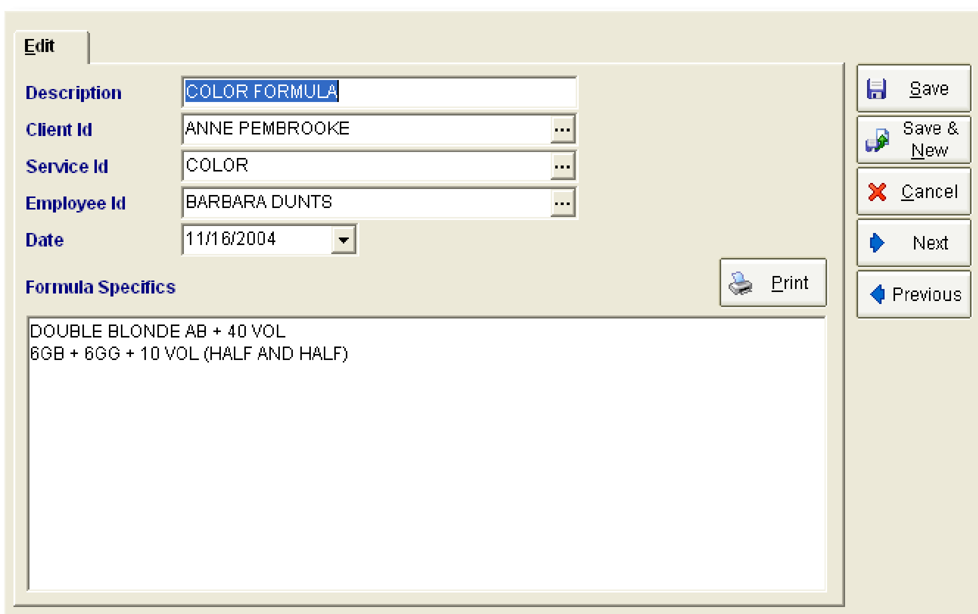
To enter the Formula List, click on "Client" on the Menu Bar and select "Formula List" as shown in the image below. You may also use the "Formula" button located on the Tool Bar to open the Formula List.







The following screen will appear after clicking "New" or "Edit" from the Formula List:



Use the screen above for entering Client Formulas. This screen can be reached by selecting either "New" or "Edit" from the Formula List.

Description

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

Client ID

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.

Service Id

Enter the specific service that this formula applies to.

Employee Id

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.

Formula Date

Today's date is automatically inserted, but you may click the drop down arrow in this field and select another date from the calendar. You may also type the date straight into the field in this format: 10/15/05.

Formula Specifics / Print Button

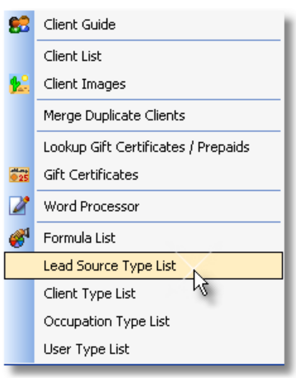
Type the description of the formula in this space. Be as specific and clear as possible. In the future, someone else may have to duplicate the formula for this client.

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

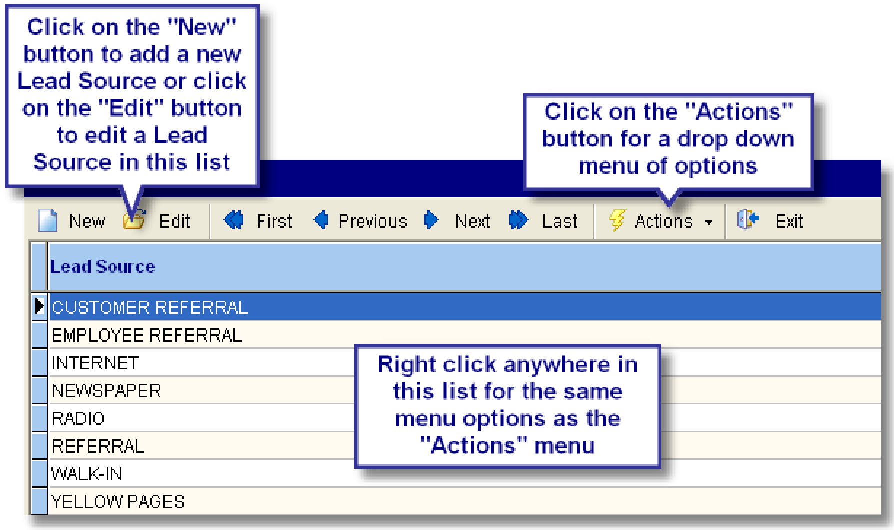
Lead Source Type List

The Lead Source Type List is used to enter how a client heard about your business.

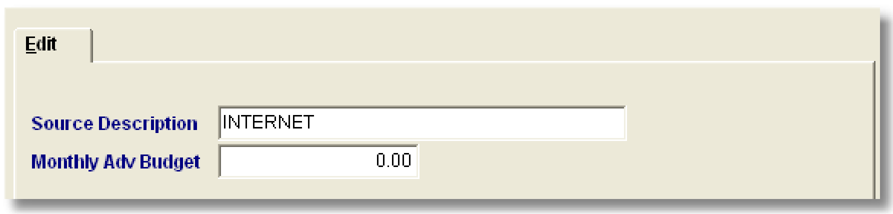
To enter the Lead Source Type List, click on "Client" from the Menu Bar and select "Lead Source Type List" as shown in the image below.



This following screen will appear. This is an example of what the Lead Source Type List will look like:



The following screen will appear when you select "New" or "Edit" from the Lead Source Type List:



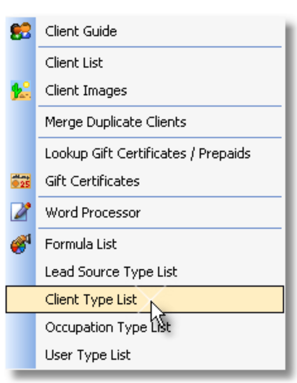
Enter the sources that are applicable to your business. Also enter the amount you pay (monthly) for advertising with this source.

Note: The items you enter here are what create the selections on the various drop-down lists in the Client screens.

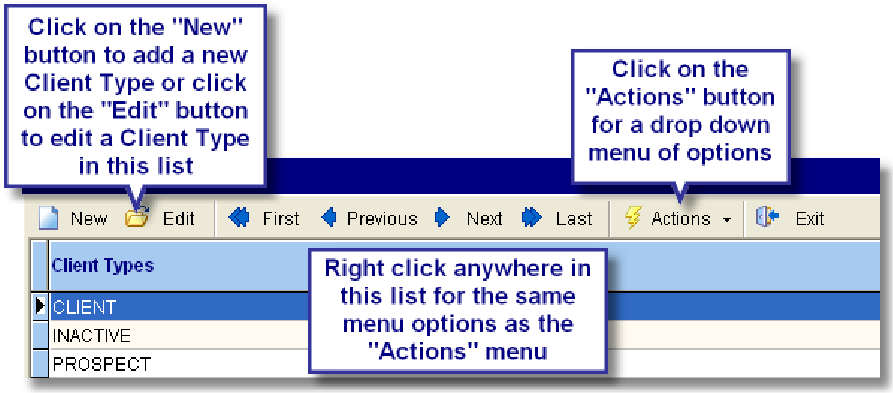
Client Type List

Client Types are used to organize your clients into logical groups you may wish to target with specific advertising or promotions. Types can also be names such as "Corporate" to identify a person who can bring in other people from his or her company. Wholesale and Retail might be Types you would use.

To enter the Client Type List, click on "Client" in the Menu Bar and select "Client Type List" as shown in the image below.



The following screen will appear. This is an example of what the Client Type List will look like:



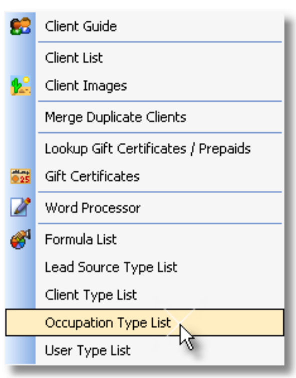
The following screen will appear when you select "New" or "Edit" from the Client Type List:

Note: The items you enter here are what create the selections on the various drop-down lists in the Client screens.

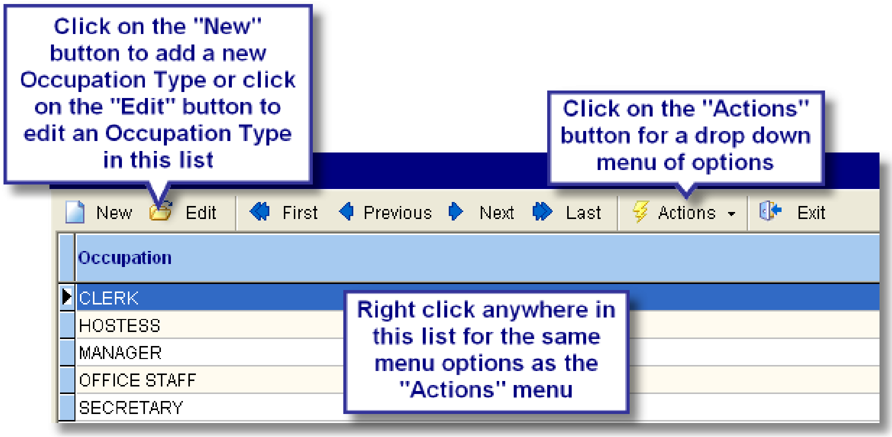
Occupation Type List

Enter basic occupation fields. For example instead of Waitress/Waiter you might want to enter "Food Industry - Wait", "Food Industry - Chef", "Food Industry - Other", etc. When you are looking for where to place your advertising dollars, or where to distribute flyers, running a report by occupation of your current clients will reveal where to concentrate your efforts.

To enter the Occupation Type List, click on "Client" from the Menu Bar and select "Occupation Type List" as shown in the image below.



The following screen will appear. This is an example of what the Occupation Type List will look like:



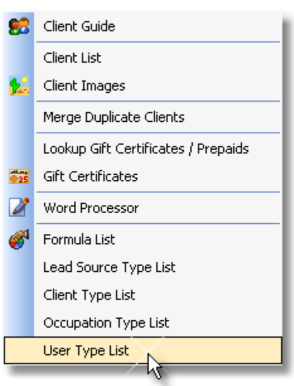
The following screen will appear when you select "New" or "Edit" from the Occupation List:

Note: The items you enter here are what create the selections on the various drop-down lists in the Client screens.

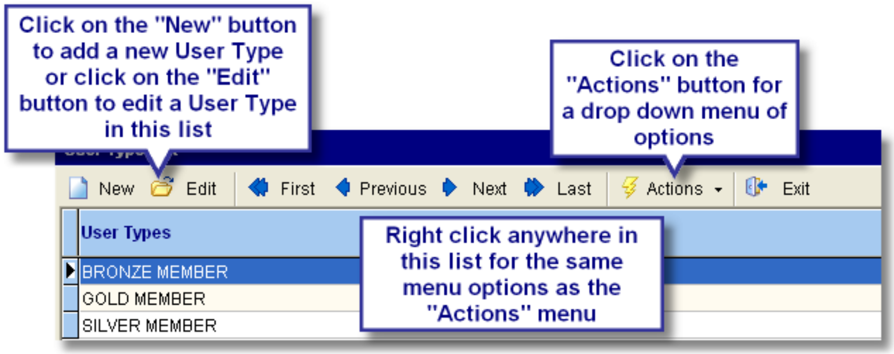
User Type List

Many businesses have memberships or "Preferred" customer levels to encourage the clients and to make them feel a part of your business. If you use these designations for your clients, enter them here. An example of another User Type is "5 Year Customer", "3 Year Customer", "Year Round", "Winter Visitor", etc.

To enter the User Type List, click on "Client" from the Menu Bar and select "User Type List" as shown in the images below.



The following screen will appear. This is an example of what the User Type List will look like:



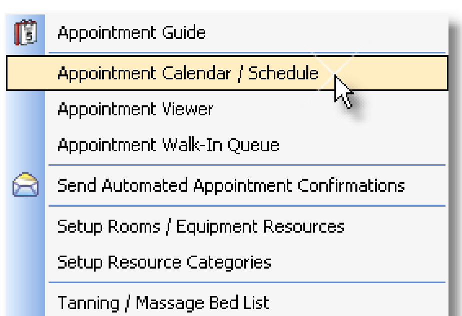
The following screen will appear if you select "New" or "Edit" from the User Type List:

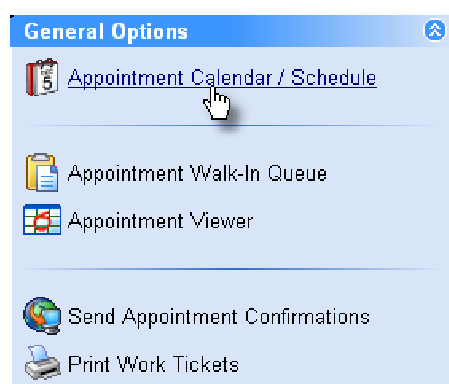
Note: The items you enter here are what create the selections on the various drop-down lists in the Client screens.

Appointments

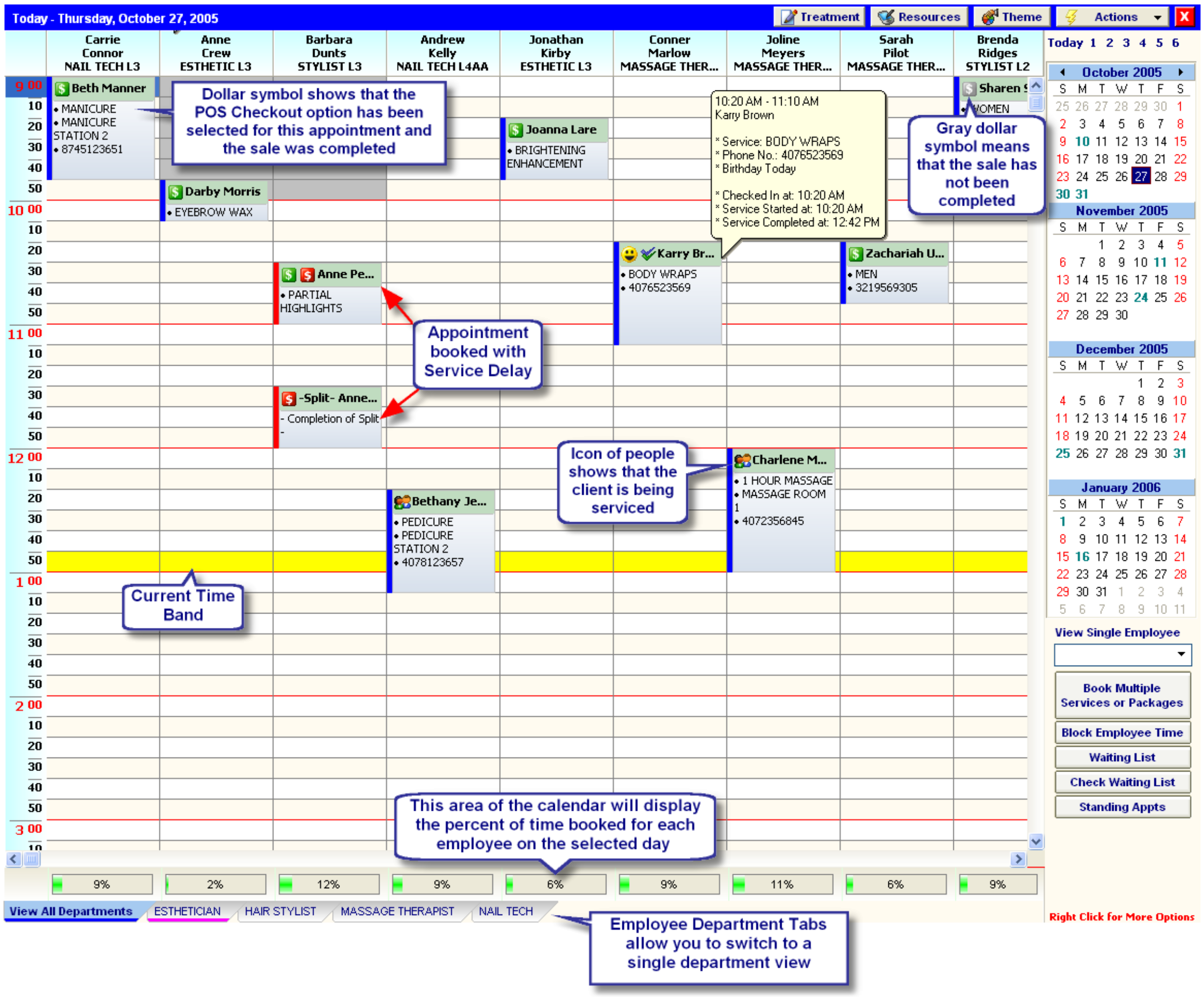
Appointment Calendar Overview

The Appointment Calendar can be reached by clicking on the "Calendar" button, located on the Tool Bar. This is the quickest and easiest method available for opening the Appointment Calendar. You may also click on "Appointment Calendar" under "General Options" on the Appointment Guide window or click on "Appointment" on the Menu Bar and select "Appointment Calendar" from the drop down menu.

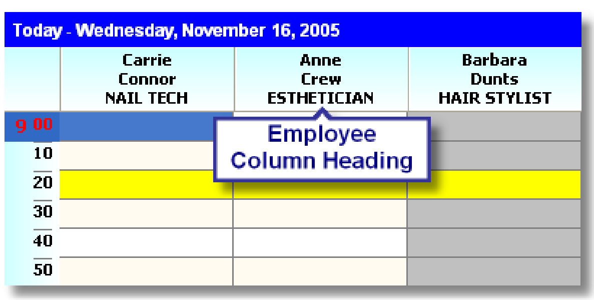


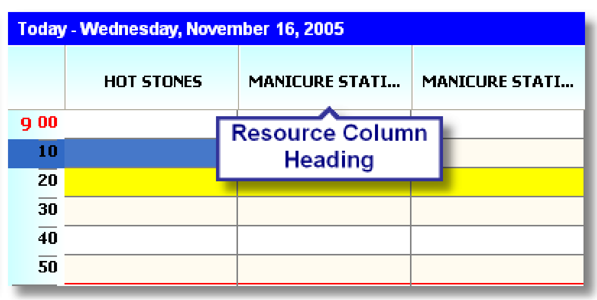


The key to using the Calendar is to double-click on an available time slot or on top of an appointment to edit or create an appointment.



Employees and Resources

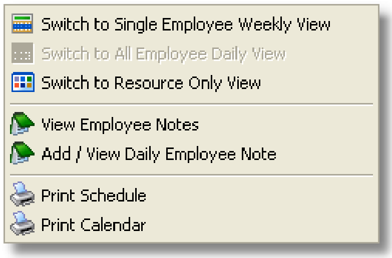




The top row of the Appointment Calendar displays the Employee's or Resources you have available for appointments. The employees will have their scheduled time (set employee schedules by selecting "Employee Schedule" from the "Employee" menu.) shown in yellow or the color you set with the "Theme" button. Their off time will be shown in gray or the color you set with the "Theme" button. When you rest your mouse arrow over the employee's column heading, 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

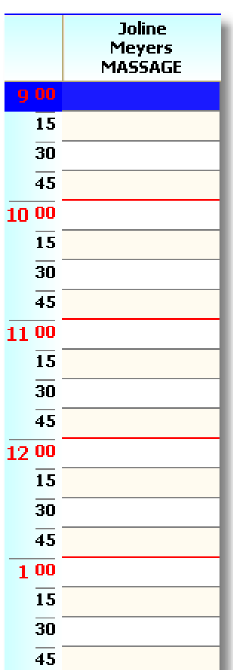
When you right click on an employee's column heading on the top row of the Appointment Calendar, you will receive the following menu options:

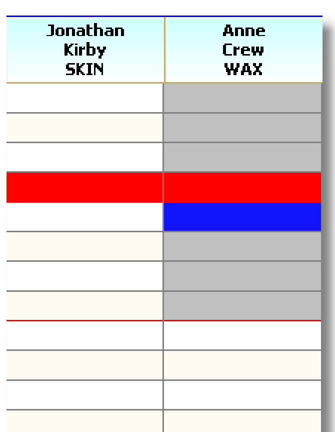


- **Switch to Single Employee Weekly View:** Select this option to change the calendar view to display a full week schedule for the selected employee.
- **Switch to All Employee Daily View:** Select this option to switch back to the regular calendar view when you are using the Single Employee Weekly 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 / Time Slots

Appointment Calendar Time





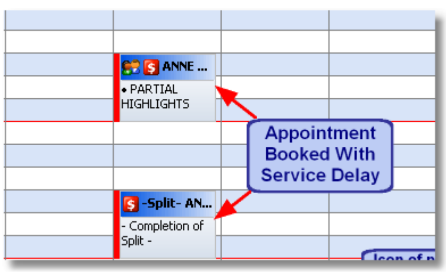
The time you have set for your store hours when you setup the program, are the range of times shown on the column on the left. You set store hours by selecting "Setup Program Preferences" from the "Company" menu. The off white and white blocks indicate that the employee is available for those hours. By default, this will encompass the Store Hours you set. By going to the Employee Schedule and entering the working hours for each employee, you can change the hours available for an employee. If the employee is not scheduled to work, the area of their column that they are not scheduled for will be grayed out. For example, in the image on the previous page, Anne Crew isn't scheduled to work until 11:00AM. Her hours from 9:00 to 11:00 are grayed out in her column.

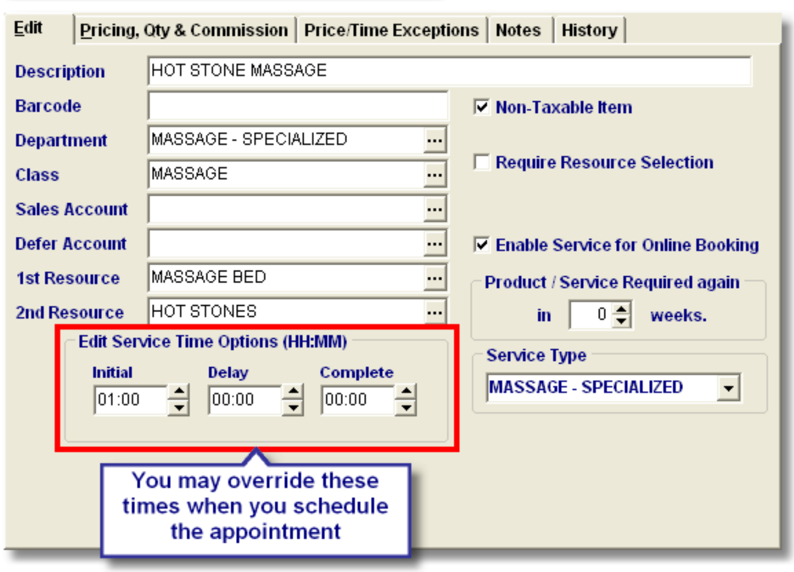
Appointment Time Slots

These are the time slots (shown in the image on the previous page) 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 and then click the "Block Employee Time" button and the times will be automatically entered for you.

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

Delay Service Appointment

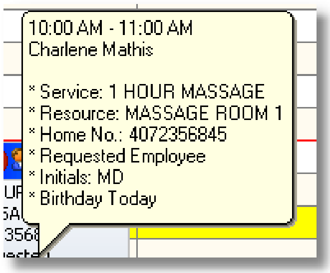




A delay service is a service that requires a period of time to elapse between the first part of the service and the final part. For example, if you have a service for hair coloring, it takes an amount of time to apply the color, then it must process in the hair for a set period of time, and then it must be neutralized to finish the service. If it takes 30 minutes to apply the color and then it must process in the hair for 30 minutes, and finally, it is neutralized which takes 30 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. Shown is a screen shot of a Delay Service item being added in Inventory.

Calendar Display / View

Calendar Note Popup



Hover your cursor over an appointment to see more information about the appointment that is booked. This is useful if you are not able to see the entire name of the client that is coming in, or if you need to view the client's phone number, time, or the service that is booked.

Appointment Calendar Icons

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

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

- appears on the appointment when you have right clicked on top of the appointment and selected "Confirm Appointment - Left Message.

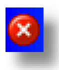
- appears on the appointment when you have right clicked on top of the appointment and selected "Check In".

- appears on the appointment when you have right clicked on top of the appointment and selected "Begin Servicing Client".

- appears on the appointment when you have right clicked on top of the appointment and selected "Finish Servicing Client".

- appears on the appointment when you have right clicked on top of the appointment and selected "POS Check Out".

- appears 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.



- appears 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.

- appears if you have disabled Appointment Confirmations for the selected client.

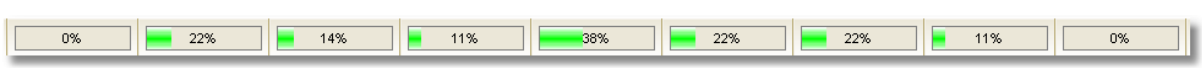
- appears on the appointment if the client has a birthday anytime within the week that their appointment is scheduled for.

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

- appears on the appointment when resource colors are displayed in the calendar instead of the standard colors and the client is a New Client.

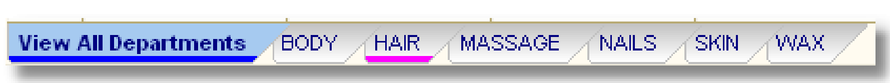
- appears on the appointment when resource colors are displayed in the calendar instead of the standard colors and the client requested the service provider they are scheduled with.

Calendar Column Percentages



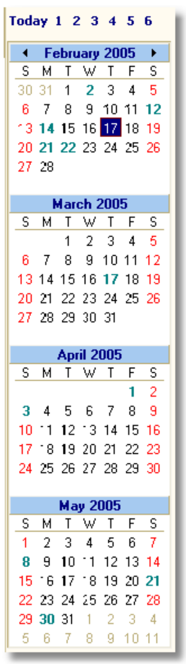
This area of the calendar will display the percent of time booked for each employee on the selected day.

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 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.

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.

View Single Employee

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.

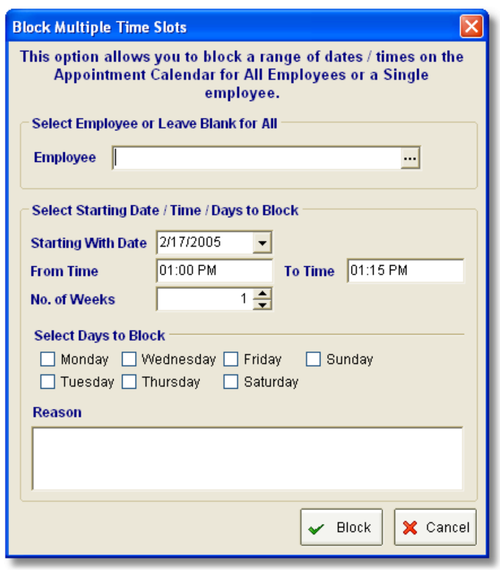
Calendar Buttons

Book Multiple Services or Packages

Click this button and the program opens a screen that allows you to select a Service or Package and have the program automatically scan for an open appointment time. 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.



This screen allows you to block off all or one of your employee's times in the Appointment Calendar. Select and enter your options and click the "Block" button to block off the times in the calendar.

Waiting List

This button allows you to place clients on the waiting list.

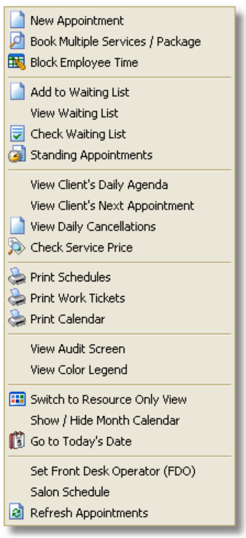
Check Waiting List

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 allows you to manage your listing of Standing Appointments. The screen that appears will allow you to add standing appointments to the Appointment Calendar.

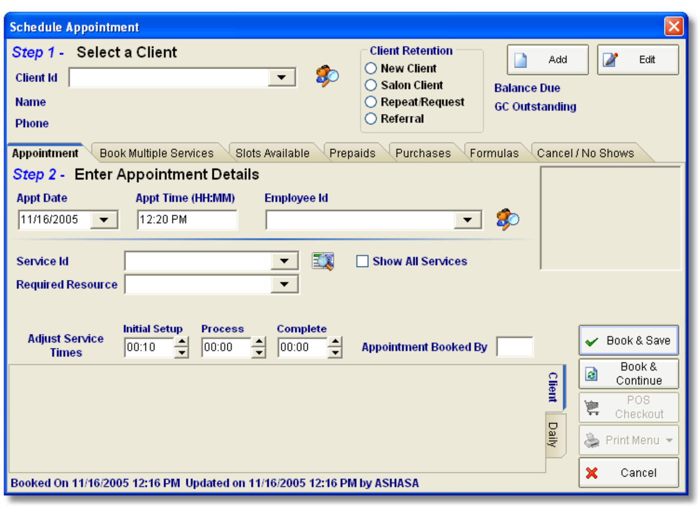
Menu Options - Actions Menu / Right Click on Available (Empty) Time Slot



This menu will appear when you click on the Actions button or when you right click on an available time slot in the Appointment Calendar.

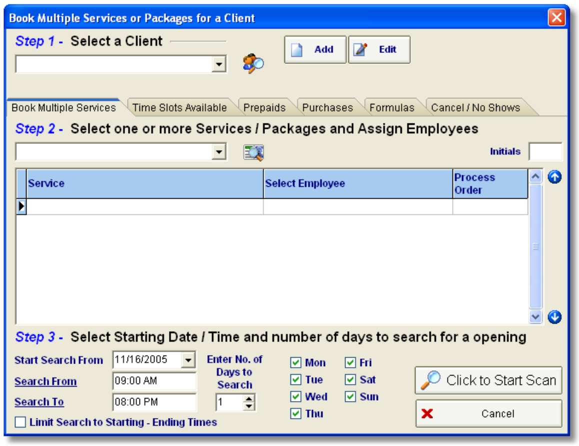
Note: Double click any time slot on the calendar and you will be able to create a new appointment.

New Appointment



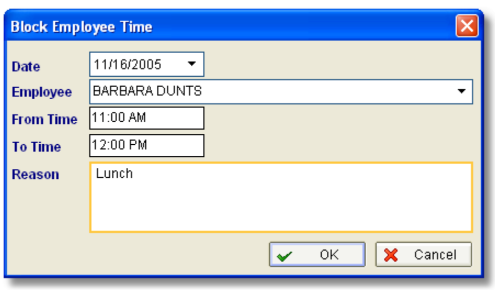
Select this option to schedule an appointment in the calendar. The difference between selecting this option and double clicking a time slot is the Schedule Appointment screen is blank when the "New Appointment" option is selected. Double clicking a timeslot will open the Schedule Appointment screen with the Employee, Date, and Time entered.

Book Multiple Services / Package



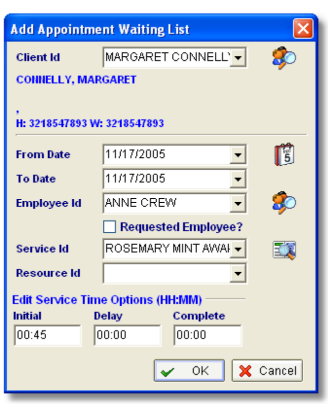
Click this button and the program opens a screen that allows you to select a Service or Package and have the program automatically scan for an open appointment time. This is a very fast way to find an open appointment time while dealing with the clients call.

Block Employee Time



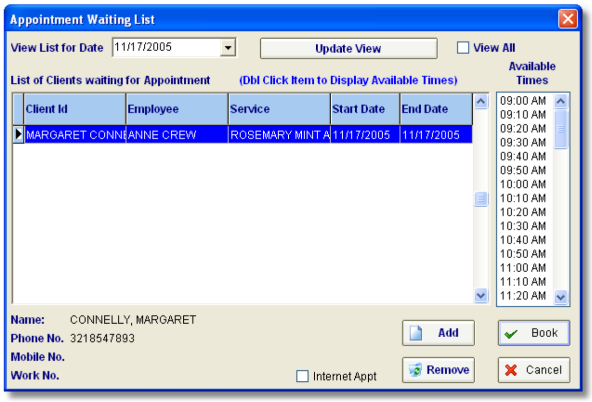
Click this button to set a period of time that the employee is not available. If you first drag across a block of time on the schedule for an employee, then select this option by either right clicking on the time you would like to block or clicking the actions button, the times will be filled in automatically.

Add to Waiting List



Click this button to add a client to the Waiting List. Enter the necessary information for the appointment you are adding to the Waiting List.

View Waiting List

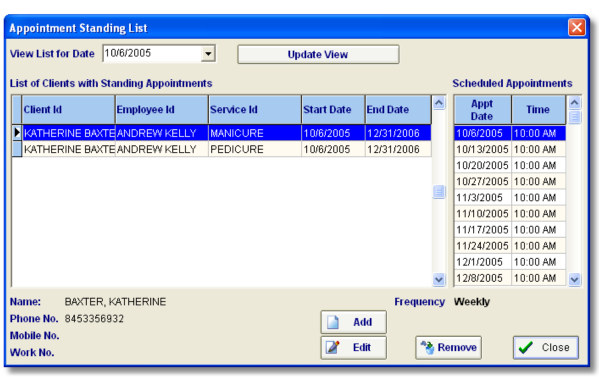


Click this button to view the Waiting List. You may add or remove appointments from the Waiting List if needed, or change the date and click the "Update View" button to view the list for a different day.

Check Waiting List

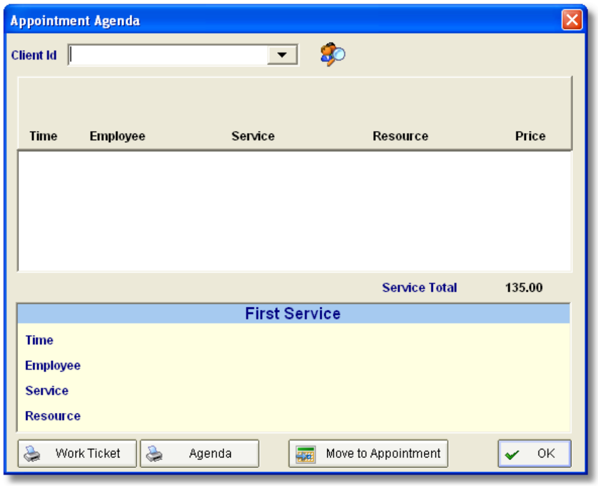
Click this button and the program will automatically check the waiting list and employee time slots and present you with appointments that can be booked. Select the correct time and click the "Book" button. If you would like to remove the appointment from the Waiting List, click the "Delete" button.

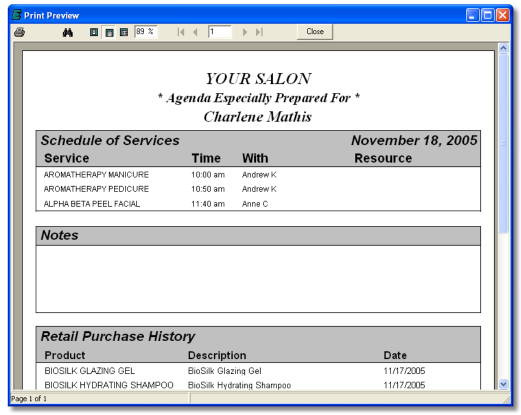
Standing Appts



Click this button to create or edit a Standing Appointment. Click the "Add" button to add a standing appointment or click the "Edit" button to edit a standing appointment. After adding a standing appointment, the scheduled appointments will appear in the Scheduled Appointments area.

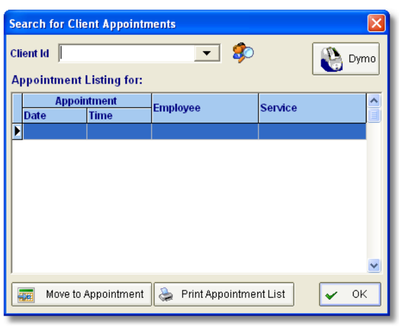
View Client's Daily Agenda





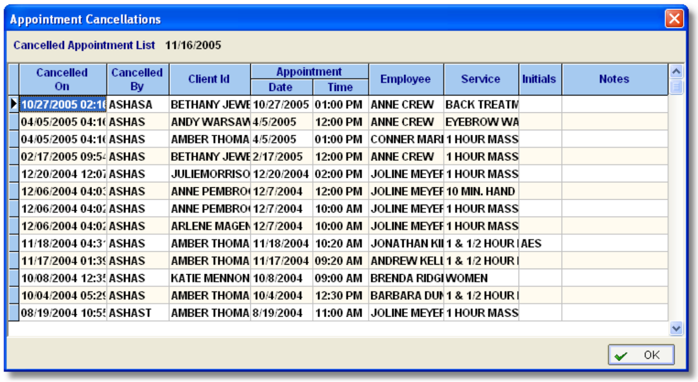
Select this option to view a client's Daily Agenda. Select the client in the Client Id area to view their Daily Agenda. Click the "Work Ticket" button with the printer icon to print work tickets for the selected client. If you would like to print out the agenda for the client, click the "Agenda" button with the printer icon.

View Client's Next Appointment



Select this option to view a client's next appointment. Select the client in the Client Id area to view their future scheduled appointments. Click the "Move to Appointment" button to jump to that date on your Appointment Calendar, or click the "Print Appointment List" button to print a list of the selected client's future appointments.

View Daily Cancellations



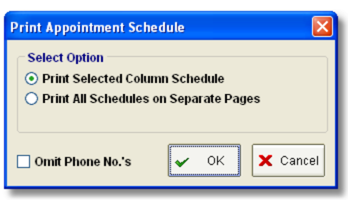
Cancelled On	Cancelled By	Client Id	Appointment Date	Appointment Time	Employee	Service	Initials	Notes
10/27/2005 02:1	ASHASA	BETHANY JEWE	10/27/2005	01:00 PM	ANNE CREW	BACK TREATM		
04/05/2005 04:1	ASHAS	ANDY WARSAW	4/5/2005	12:00 PM	ANNE CREW	EYEBROW WA		
04/05/2005 04:1	ASHAS	AMBER THOMA	4/5/2005	01:00 PM	CONNER MARI	1 HOUR MASS		
02/17/2005 09:5	ASHAS	BETHANY JEWE	2/17/2005	12:00 PM	ANNE CREW	1 HOUR MASS		
12/20/2004 12:0	ASHAS	JULIEMORRISO	12/20/2004	02:00 PM	JOLINE MEYEF	1 HOUR MASS		
12/06/2004 04:0	ASHAS	ANNE PEMBRO	12/7/2004	12:00 PM	JOLINE MEYEF	10 MIN. HAND		
12/06/2004 04:0	ASHAS	ANNE PEMBRO	12/7/2004	10:00 AM	JOLINE MEYEF	1 HOUR MASS		
12/06/2004 04:0	ASHAS	ARLENE MAGEN	12/7/2004	10:00 AM	JOLINE MEYEF	1 HOUR MASS		
11/18/2004 04:3	ASHAS	AMBER THOMA	11/18/2004	10:20 AM	JONATHAN KII	1 & 1/2 HOUR I	AES	
11/17/2004 01:3	ASHAS	AMBER THOMA	11/17/2004	09:20 AM	ANDREW KELL	1 & 1/2 HOUR I		
10/08/2004 12:3	ASHAS	KATIE MENNON	10/8/2004	09:00 AM	BRENDA RIDGI	WOMEN		
10/04/2004 05:2	ASHAS	AMBER THOMA	10/4/2004	12:30 PM	BARBARA DUN	1 & 1/2 HOUR I		
08/19/2004 10:5	ASHAST	AMBER THOMA	8/19/2004	11:00 AM	JOLINE MEYEF	1 HOUR MASS		

Each time you cancel an appointment the program stores that information. Any time you wish, select this choice and see all the cancellations for the current day.

Check Service Price

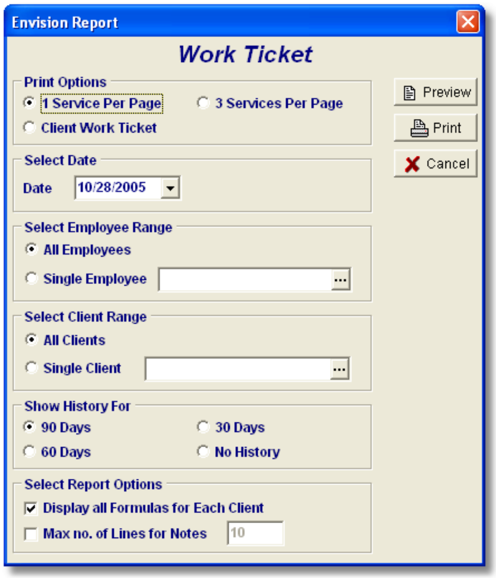
When setting appointments you often need to check the price of the service. Select this option and select a service. Since the program allows various prices for different levels of expertise of employees, you can enter an employee level to see the Service price for different levels.

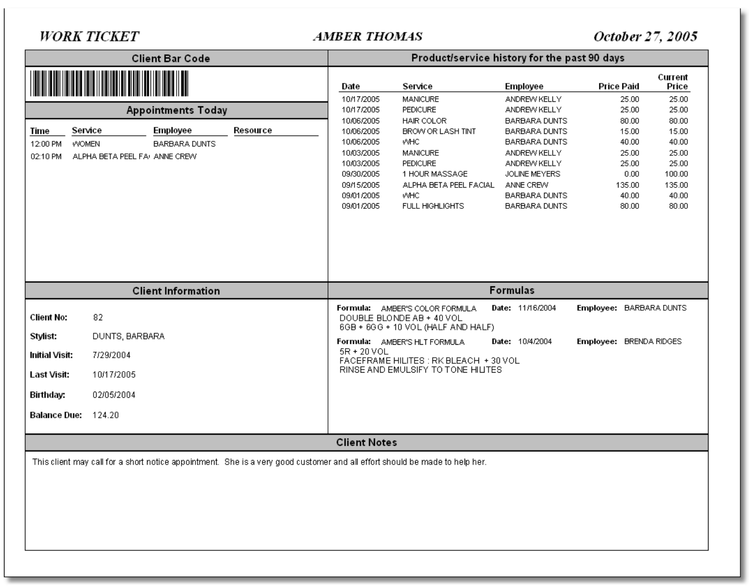
Print Schedules



Selecting this option will present you with the above screen, offering two choices. You can print a schedule for the column you have selected or you may select to "Print All Schedules on Seperate Pages".

Print 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)

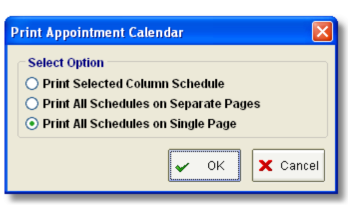
Formula: AMBER'S HLT FORMULA **Date:** 10/4/2004 **Employee:** BRENDA RIDGES
5R + 20 VOL
FACEFRAME HILITES : RK BLEACH + 30 VOL
RINSE AND EMULSIFY TO TONE HILITES

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.

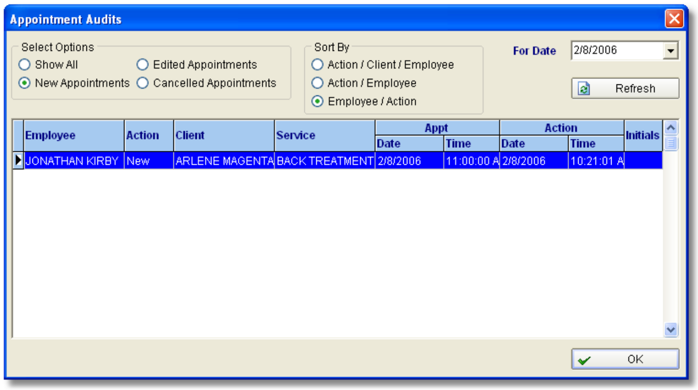
This choice allows you to print (with a screen preview) the work tickets for a single employee or all employees. You can select a date and choose to display 30, 60, or 90 days history.

Print Calendar



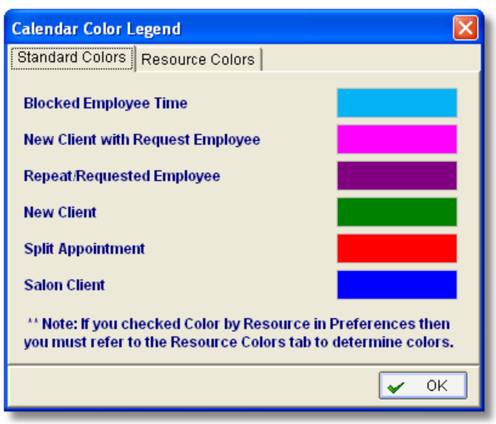
You may choose to print the Selected Column Schedule or All schedules on separate pages or on a single page. This is similar to the Print Schedules option, however the format of the print out is exactly like the Appointment Calendar.

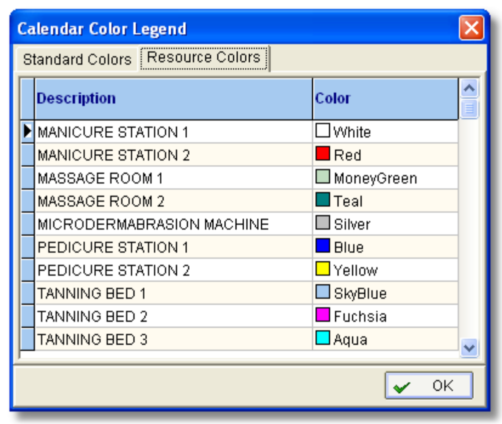
View Audit Screen



Select this option to view information about the booking of appointments. The Appointment Audit screen will tell you if an appointment was deleted, canceled, or created and will also display the initials of the person that booked the appointment if you require this information to be entered when booking an appointment.

View Color Legend





Each resource used can be shown with a different color. These colors are setup using the "Setup Calendar Resources" choice on the "Appointments" menu. This choice allows you to review the colors.

Switch to Resource Only View

Select this option to display appointments by the resource. The resources will be displayed in the employee columns.

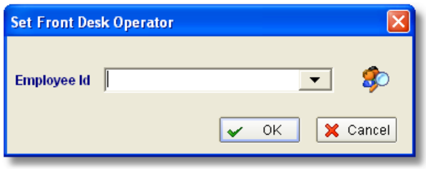
Show / Hide Month Calendar

Click this choice to alternate between showing or hiding the entire right pane of the screen that includes the small monthly calendar. This will leave more room to display appointments. To re-display the right pane, click the "Actions" button and click once more on this choice.

Go to Today's Date

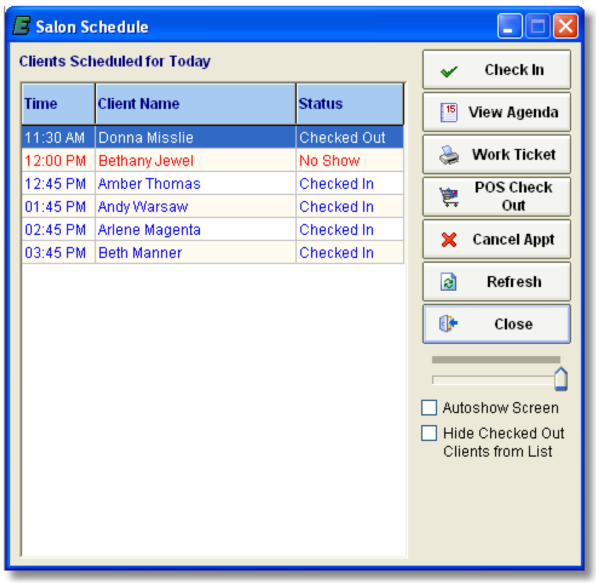
During a busy scheduling period you may be making appointments for weeks ahead. When you need to quickly see the current day's schedule, select this choice.

Set Front Desk Operator



This option allows you to set an employee as the Front Desk Operator. This allows the program to record and give credit to the selected employee for any add on services. Setting the Front Desk Operator is required for salons that are working with KRS Consulting.

Salon Schedule

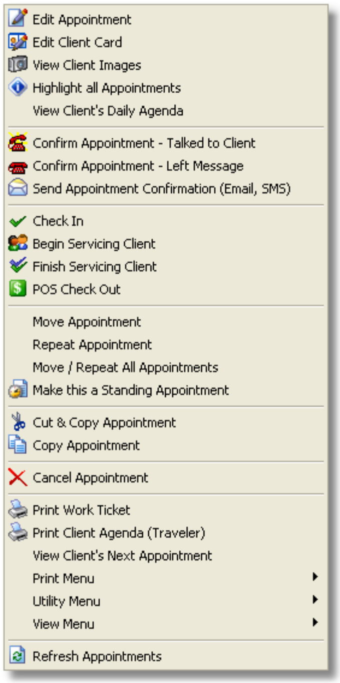


Select this option to open the Salon Schedule screen. Please refer to page for more information on how the Salon Schedule works.

Refresh Appointments

Select this choice when more than one user on a network is making appointments. This option will refresh your screen to reflect the latest information.

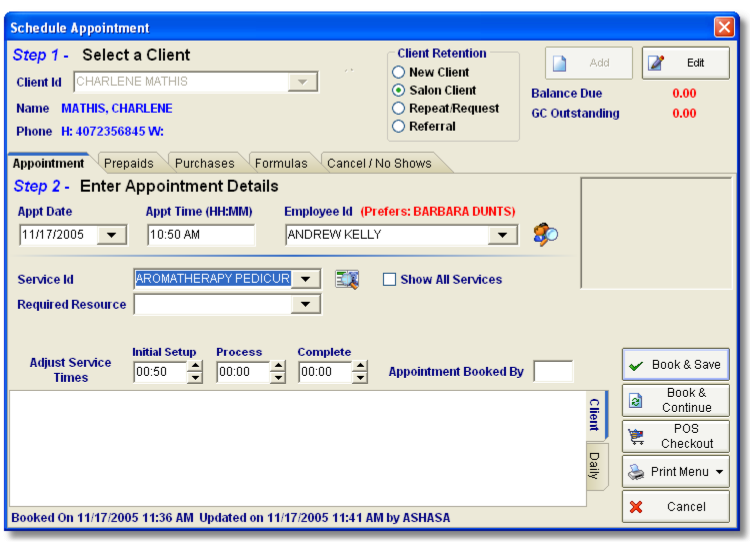
Menu Options - Right Click On Appointment (Current Date)



This menu will appear when you right click on top of an appointment on the current date (date that is set on the computer's clock).

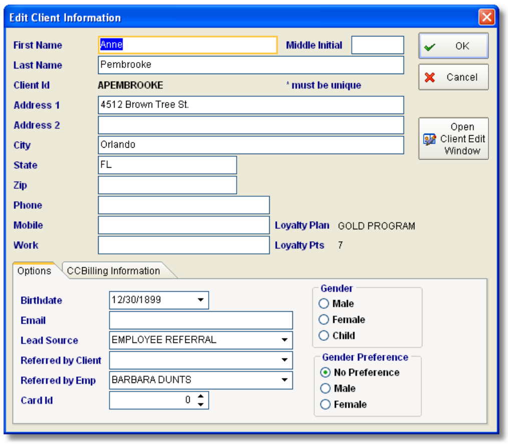
Note: Double click any time slot on the calendar and you will be able to create a new appointment.

Edit Appointment



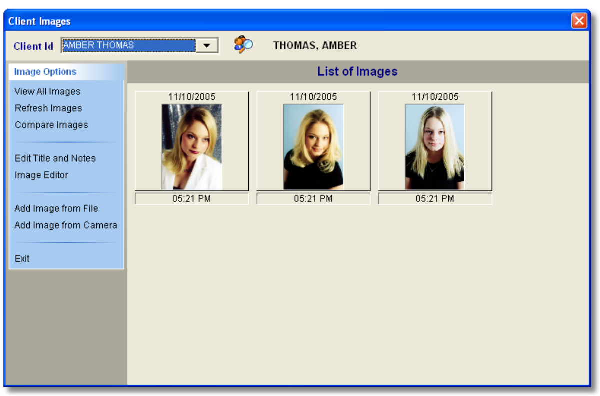
Select this option to edit the appointment that you are clicking on.

Edit Client Card



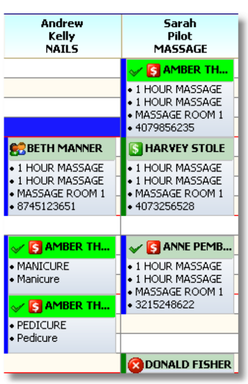
Select this option to edit the client's information.

View Client Images



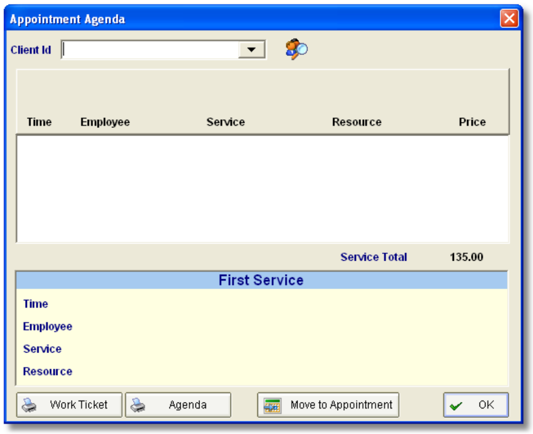
Select this option to open the Client Images window. This option allows you to view the selected client images and add or edit images to their file.

Highlight All Appointments



Select this option to highlight all the appointments that are scheduled for the day for the selected client.

View Client's Daily Agenda



Select this option to view the selected client's daily agenda.

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.

Email Appointment Confirmation

Select this option to send an appointment confirmation by email to the selected client. Your email settings must be configured correctly and the client must have an email address entered in their client file for this to work.

Check In

Select this option to place an icon on the client's appointment to show that they have arrived.

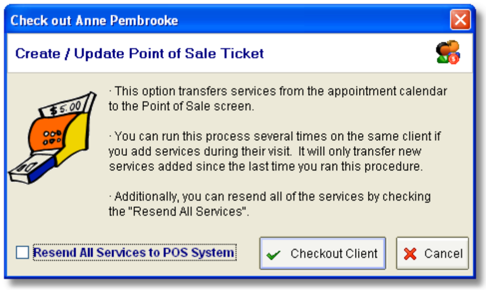
Begin Servicing Client

Select this option to place an icon on the appointment to show that the client is with the service provider.

Finish Servicing Client

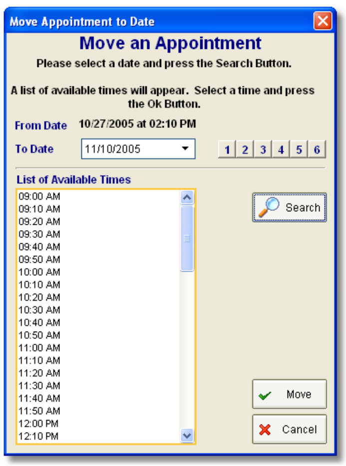
Select this option to place an icon on the appointment to show that the client's appointment is finished and they are ready to be checked out.

POS Check Out



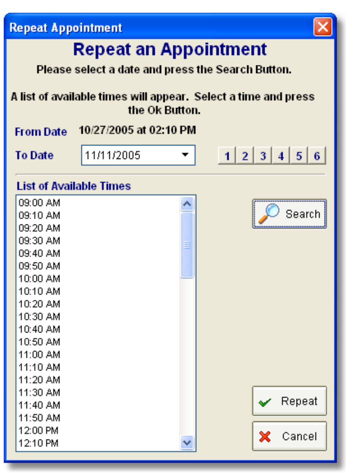
Select this option to Check the client out. This option will bring all the services that are scheduled for the selected client into the POS (Point of Sale) window. All you will need to do is add any additional services or retail and click the "Sale" button to finish the transaction.

Move Appointment



Select this option to move the appointment to a different date or time.

Repeat Appointment



Select this option to schedule the same exact appointment on a different date.

Move / Repeat All Appointments

Make This a Standing Appointment

Select this option to make the existing appointment a standing appointment.

Cut & Copy Appointment

Select this option to remove the appointment from the current time slot so that you may paste the appointment in a different time slot.

Copy Appointment

Select this option if you would like to make a copy of the appointment so that you may paste the appointment in an additional time slot. This is similar to the Repeat Appointment option.

Paste Appointment

Select this option to paste the appointment that was cut or copied.

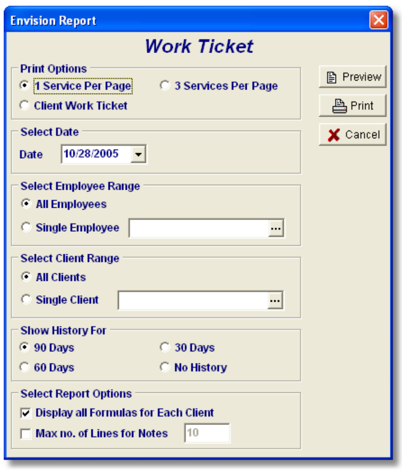
Cancel Appointment

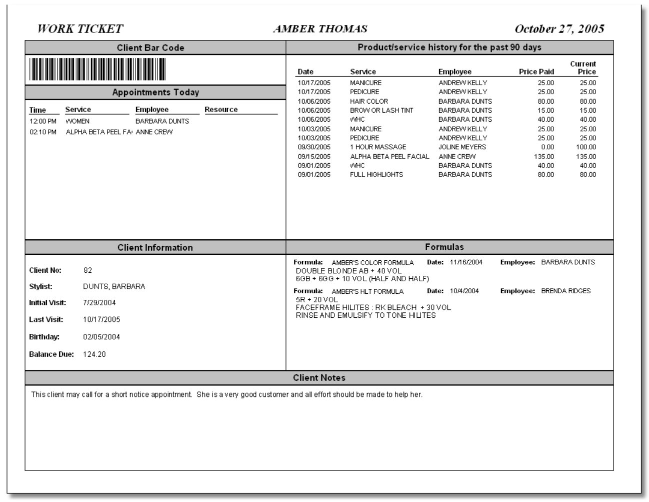
Select this option if you need to cancel the existing appointment. This option will remove the appointment from the calendar.

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.

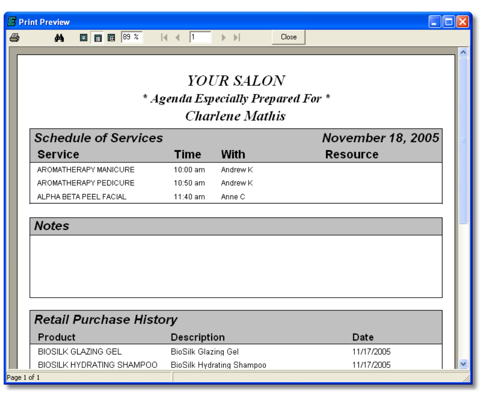
Print Work Ticket





This choice allows you to print (with a screen preview) the work tickets for the selected appointment or the selected client's appointments. You can select a date and choose to display 30, 60, or 90 days of history.

Print Client Agenda (Traveler)

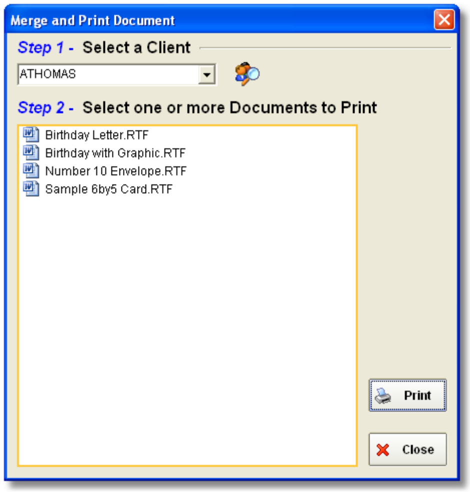


Select this option to print the client agenda. This is useful for the client so that they have a print out of their schedule for the day.

Print Calendar

You may choose to print the Selected Column Schedule or All schedules on separate pages or on a single page. This is similar to the Print Schedules option, however the format of the print out is exactly like the Appointment Calendar.

Print Document



Select this option to print a document for the selected client from the Appointment Calendar.

Check Service Price

When setting appointments you often need to check the price of the service. Click this button then select a service. Since the program allows various prices for different levels of expertise of employees, you can enter an employee level to see the Service price for different levels.

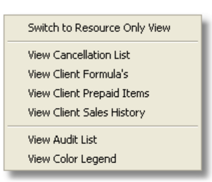
View Client's Next Appointment

When you have a client name highlighted on the appointment calendar, click this button and that client's next appointment will be shown.

Switch to Resource Only View

Select this option to display appointments by the resource. The resources will be displayed in the employee columns.

View Menu



View Cancellation List: Each time you cancel an appointment the program stores that information. Any time you wish, select this choice and see all the cancellations for the current day.

View Client Formula's: Select this option to view the selected client's formulas.

View Client Prepaid Items: Select this option to view the selected client's prepaid items.

View Client Sales History: Select this option to view the selected client's sales history.

View Audit List: Select this option to view information about the booking of appointments. The Appointment Audit screen will tell you if an appointment was deleted, canceled, or created and will also display the initials of the person that booked the appointment if you require this information to be entered when booking an appointment.

View Color Legend: Each resource used can be shown with a different color. These colors are setup using the "Setup Calendar Resources" choice on the "Appointments" menu. This choice allows you to review the colors.

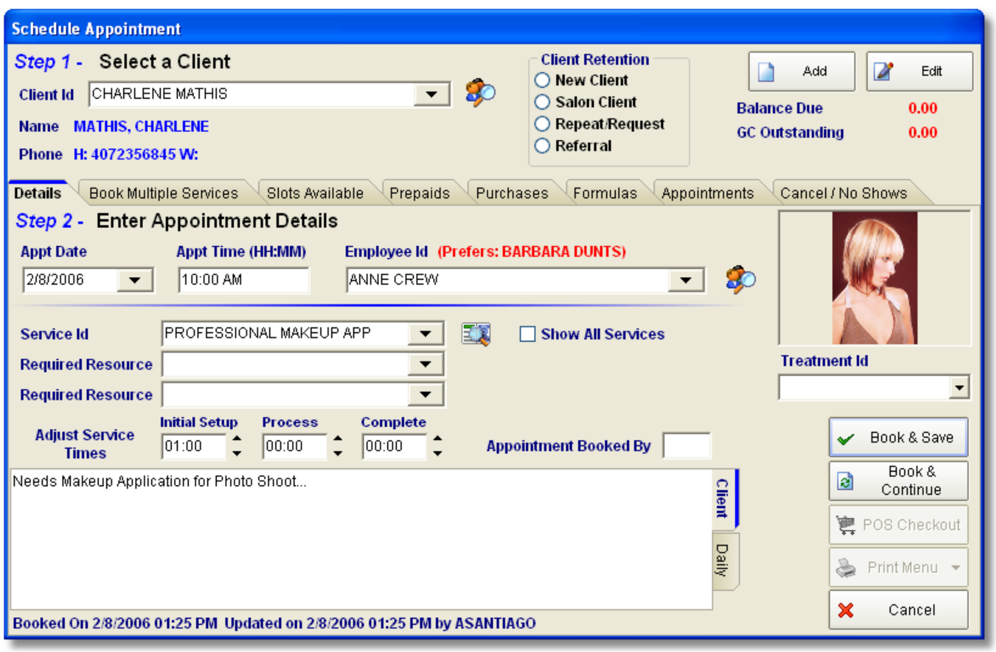
Refresh Appointments

Select this choice when more than one user on a network is making appointments. This option will refresh your screen to reflect the latest information.

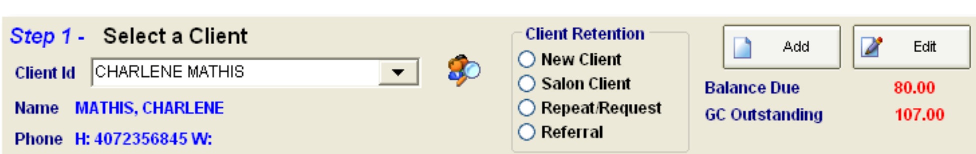
Schedule Appointment Screen

Details Tab

This is the working screen for the Appointment Calendar. By double-clicking any time slot, you will see this screen. You may also click the "New Appointment" button to get to this screen. There are many powerful features loaded onto this screen. We suggest that you click the different controls, buttons, etc., in the below screen shot to she how they work and learn the potential time saving available by using these features.

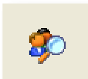


Step 1 - Select a Client

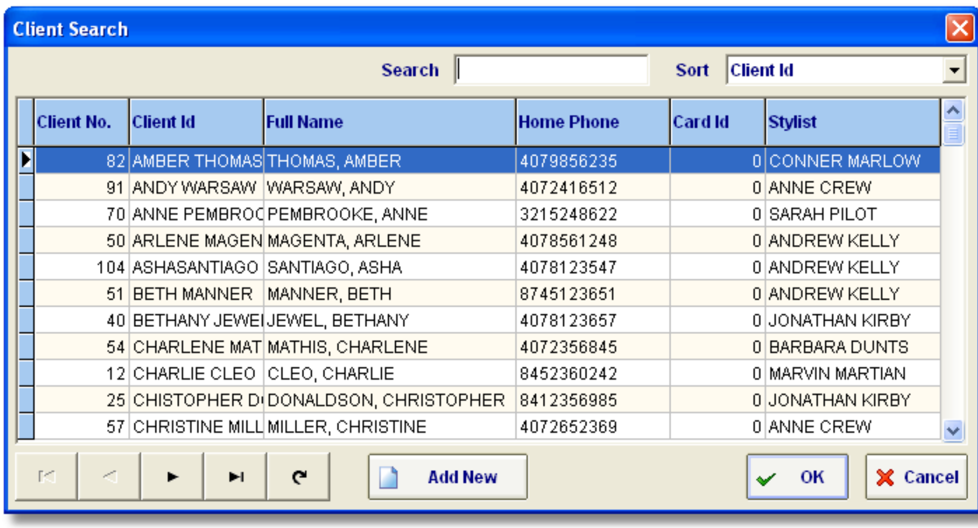


Client Id

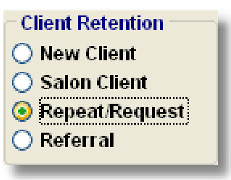
This field allows you to select a client if a client has not already been selected. Start typing in the name of the client to narrow down the search. This will populate names into the Client ID field. If there are similar names in your Client List the program will narrow down the search by every additional 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 shown in the image below 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. Once a client is selected, their information will be displayed in the Client Selection area.

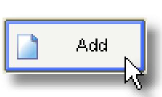


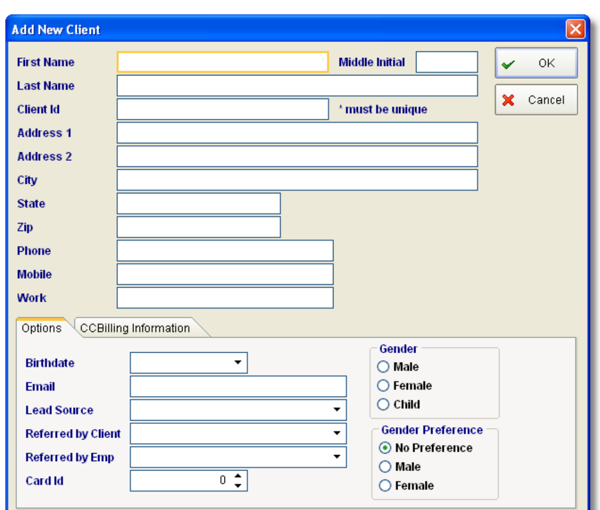
Client Retention Selection



Select the type of retention for the client here.

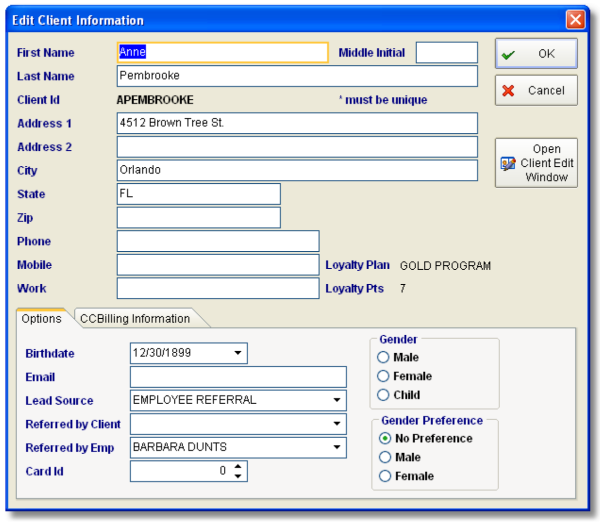
Add Client Button





Click this button to add a client to your client list. The above screen will appear. Enter the information that the client provides and click the "OK" button.

Edit Button



Click this button to instantly access the client's information. Thi is very useful for changing telephone numbers, address, etc. "On the Fly".

Balance Due / GC Outstanding

This area of the Schedule Appointment window will show you if there is a balance due from the selected client if the "On Acct" payment type was selected for any of their sales transactions and no payments were applied on the "Pay on Account" screen. This area will also show if the selected client has outstanding gift certificates.

Step 2 - Select Employee / Appointment Time

Employee Id

Select the employee that will perform this service by clicking the small button and choosing from the list. If you double-clicked a time slot to get to this screen, the employee will be filled in automatically.

Appt Date/Time

If you double-clicked a time slot on the schedule to get to this screen, the date and time are entered automatically. You may change them to anything you wish.

Booked By

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 an appointment.

Step 3 - Select Service and Associated Resource

Service Id

Click the small button and select from the listing the service to be performed for this appointment.

Resource Id

If a resource such as a Massage Room is required for this service, click the small button 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.

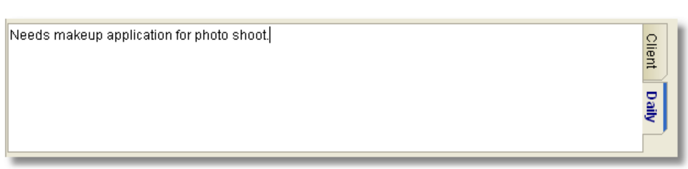
Show All

Check the "Show All" box if you would like all services displayed on the drop down arrow menu instead of only the qualified services for the selected employee. These are the services that are listed under the "Services" tab in the Employee List for each employee. If this box is not checked, only the services that the selected employee is qualified to perform, that are in their services list, will show up when you click on the drop down arrow.

Service Delay Options

When you enter a service into Inventory, you may insert a delay if required. For example, a Perm may require a 30-minute wait with the permanent solution in the client's hair. Then you may need another 30 minutes to finish the appointment. The values you entered into Inventory are shown here. If for some reason you wish to change the times, you may do so in these fields (perhaps this employee needs closer to 30 minutes instead of 15 to finish the service).

Appointment Notes

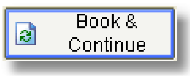


Client Notes: Any notes that you have entered for the selected client in the Client List will appear in this field.

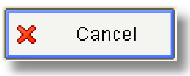
Daily Notes: You may enter a daily note for the selected client in this field.

Book / Book & Continue / Cancel Buttons

Book & Save: This button will save the information you have entered, close this screen, and bring you back to the Appointment Schedule screen.



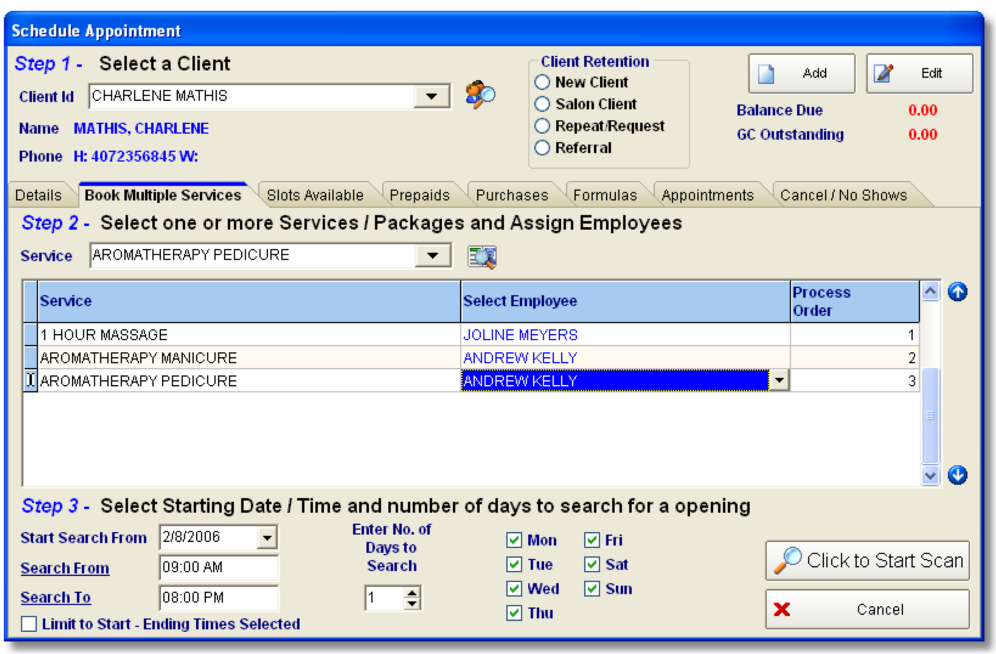
Book and Continue: Click this button to book the first service, the schedule appointment screen will remain open with the same client, Employee and Date selected. The time will change to the next available timeslot. All you will need to do to book an additional service is select the service under step 3 and edit the service time if necessary.



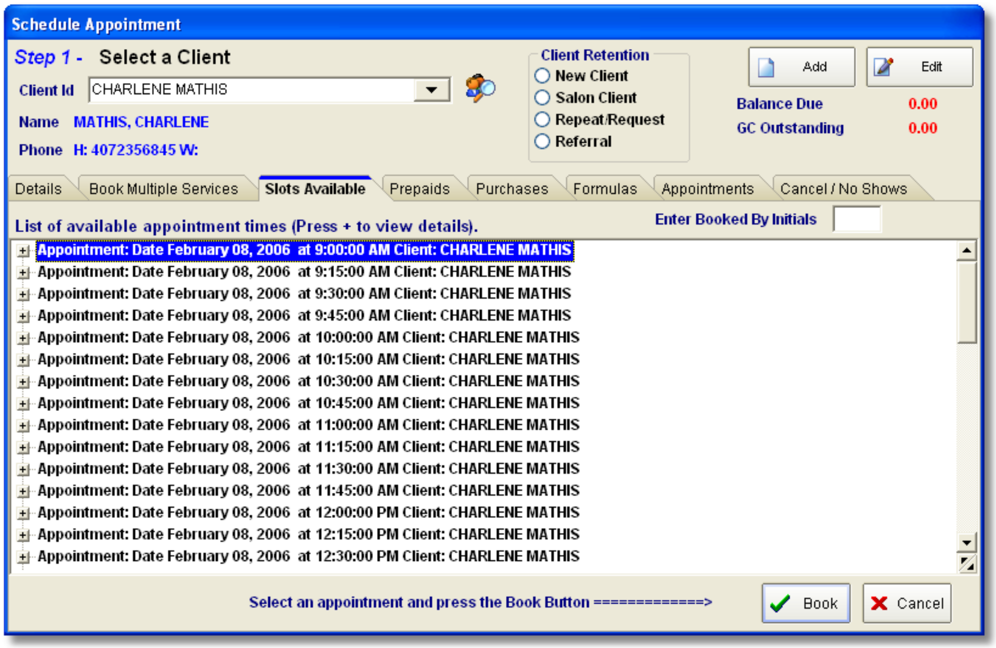
Cancel: Click this button to cancel any changes you have made and return to the Appointment Schedule screen.

Book Multiple Services Tab

Use this tab to book multiple services or packages.

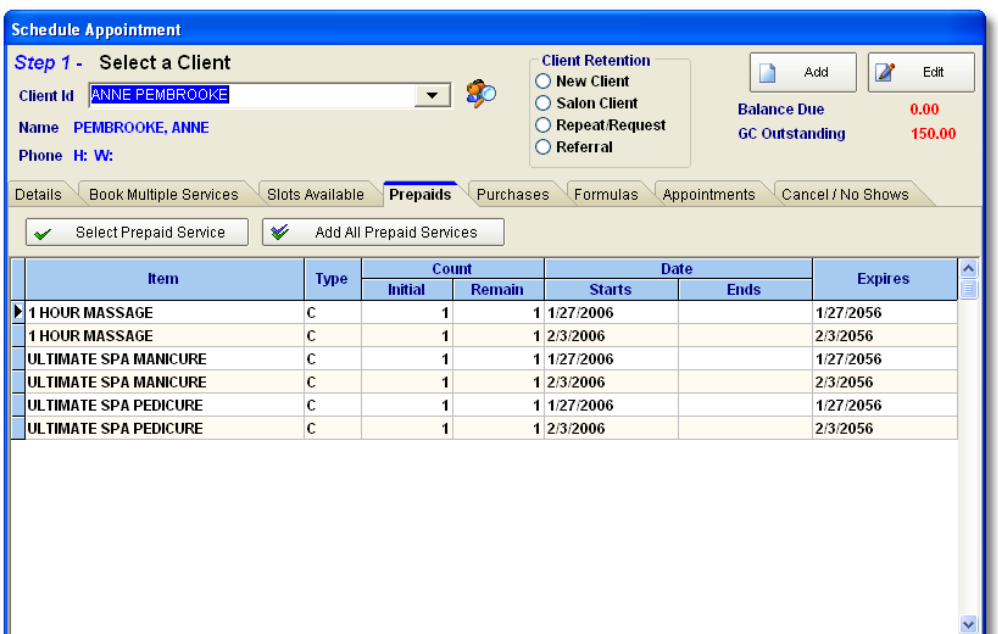


Slots Available Tab



The program will jump to this tab when you use the Book Multiple Services feature. This screen will provide you with a listing of available appointment times for multiple services. Click the "Book" button after selecting an appointment time.

Prepaids Tab



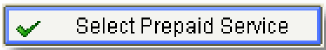
Use this screen to view a client's prepaid items. You may also select these items when scheduling appointments for the selected client.

Prepaid List

Item	Type	Count		Date		Expires
		Initial	Remain	Starts	Ends	
MANICURE	C	5	4	11/18/2005	11/18/2055	11/18/2055
PEDICURE	C	5	4	11/18/2005	11/18/2055	11/18/2055

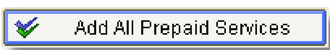
This is a listing of prepaid items that the selected client has purchased.

Select Prepaid Service



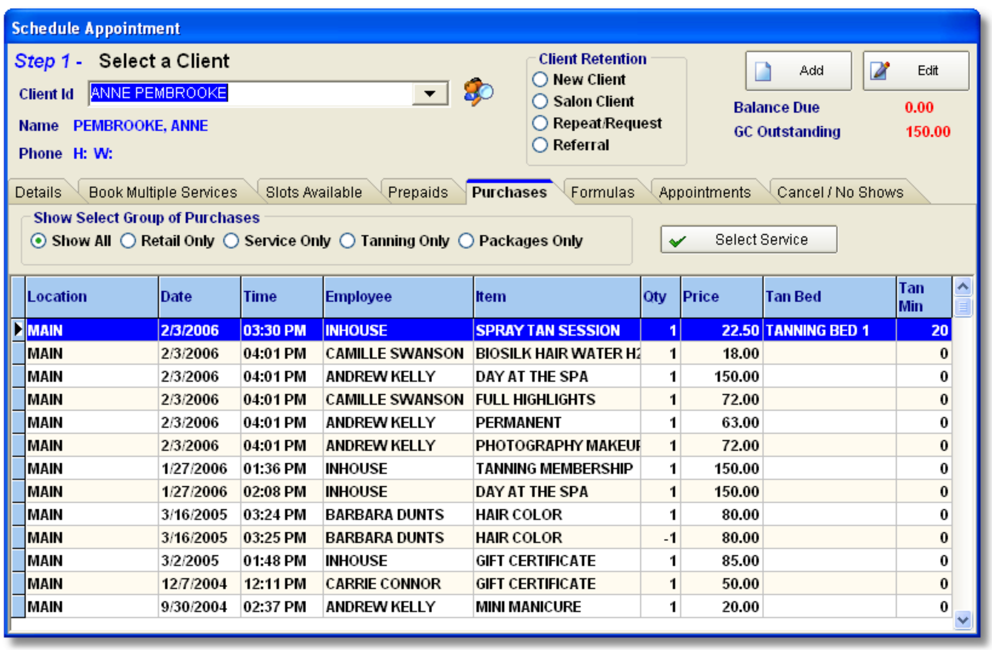
Click this button to select the highlighted service for the appointment you are booking. This option will automatically move you to the "Appointments" tab and the prepaid service will be entered into the Service Id field.

Add All Prepaid Services



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

Purchases Tab



Location	Date	Time	Employee	Item	Qty	Price	Tan Bed	Tan Min
MAIN	2/3/2006	03:30 PM	INHOUSE	SPRAY TAN SESSION	1	22.50	TANNING BED 1	20
MAIN	2/3/2006	04:01 PM	CAMILLE SWANSON	BIOSILK HAIR WATER H2	1	18.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	DAY AT THE SPA	1	150.00		0
MAIN	2/3/2006	04:01 PM	CAMILLE SWANSON	FULL HIGHLIGHTS	1	72.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	PERMANENT	1	63.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	PHOTOGRAPHY MAKEUF	1	72.00		0
MAIN	1/27/2006	01:36 PM	INHOUSE	TANNING MEMBERSHIP	1	150.00		0
MAIN	1/27/2006	02:08 PM	INHOUSE	DAY AT THE SPA	1	150.00		0
MAIN	3/16/2005	03:24 PM	BARBARA DUNTS	HAIR COLOR	1	80.00		0
MAIN	3/16/2005	03:25 PM	BARBARA DUNTS	HAIR COLOR	-1	80.00		0
MAIN	3/2/2005	01:48 PM	INHOUSE	GIFT CERTIFICATE	1	85.00		0
MAIN	12/7/2004	12:11 PM	CARRIE CONNOR	GIFT CERTIFICATE	1	50.00		0
MAIN	9/30/2004	02:37 PM	ANDREW KELLY	MINI MANICURE	1	20.00		0

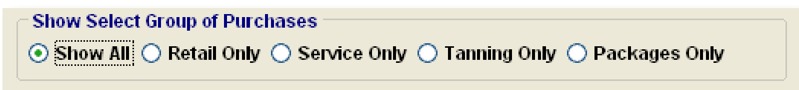
Click this tab to view the products and services that the selected client has purchased. You may also schedule an appointment for one of the services listed.

Purchases List

Date	Time	Employee	Item	Qty	Price	Tan Bed	Tan Min
11/18/2005	11:36 AM	JONATHAN KIRBY	PHOTOGRAPHY MAKEUP	1	80.00		0
11/18/2005	11:36 AM	JONATHAN KIRBY	GIFT CERTIFICATE	1	107.00		0
11/18/2005	01:51 PM	JONATHAN KIRBY	MANICURE	5	25.00		0
11/18/2005	01:51 PM	JONATHAN KIRBY	PEDICURE	5	25.00		0
11/18/2005	01:51 PM	JONATHAN KIRBY	PROFESSIONAL MAKEUP	1	70.00		0
11/18/2005	01:53 PM	JONATHAN KIRBY	PROFESSIONAL MAKEUP	1	70.00		0
11/18/2005	01:53 PM	ANDREW KELLY	MANICURE	1	25.00		0
11/18/2005	01:53 PM	ANDREW KELLY	PEDICURE	1	25.00		0
11/23/2004	09:41 AM	CONNER MARLOW	SALT GLOW	1	65.00		0

This is a listing of the items that the selected client has purchased. You may select an item from this list to book for the selected client.

Show Select Group Of Purchases

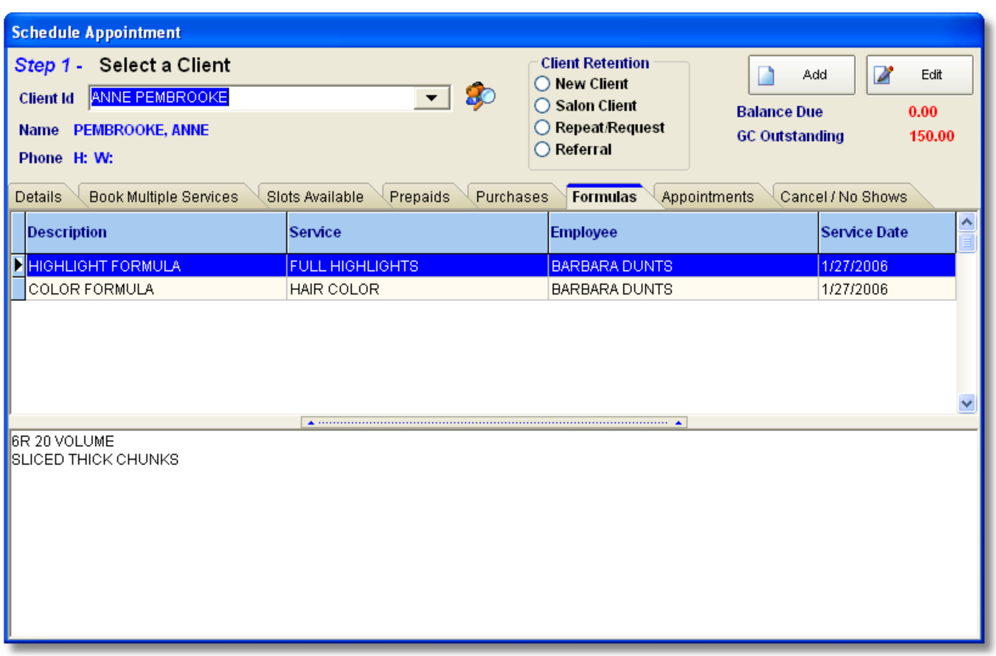


Select the type of purchases that you would like to display in this list.

Select Service Button

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 service will be entered into the Service Id field.

Formulas Tab

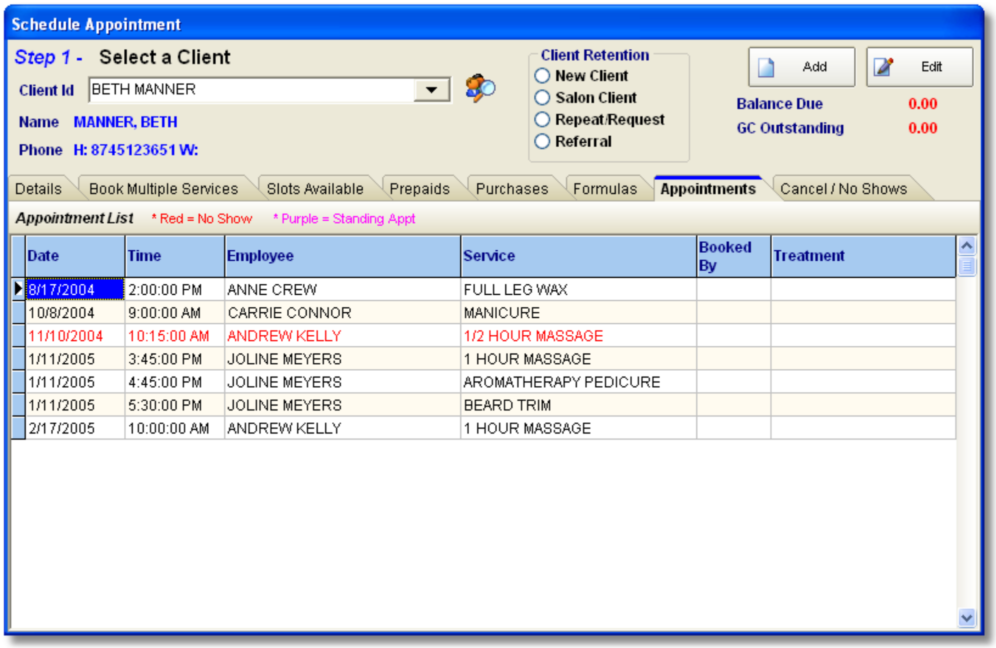


Click this tab to view the selected client's formulas.

Formula List

These windows will show the formulas and formula specifics for the selected client. Click on a formula (must be highlighted) to display the formula specifics.

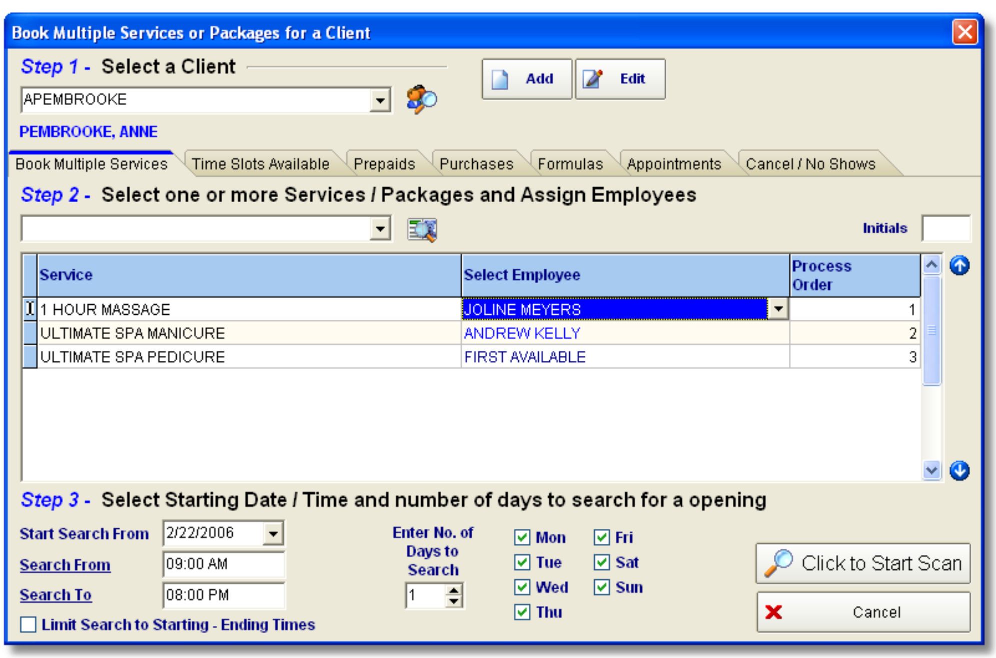
Appointments Tab



This screen can be used to view the client's list of appointments. Double left click on top of an appointment in the list to move to that appointment in the Calendar. This can be useful if you need to edit an appointment and need to quickly locate that appointment in the Calendar.

Book Multiple Services or Packages

Book Multiple Services Tab



A powerful, timesaving feature of the program is the ability to automatically book services or packages. With one click of the "Book Multiple Service or Packages" button on the Appointment screen, you can instantly find available appointments that have the resources and qualified employees available.

As shown in the image on the previous page, this is a simple 3 step process. There are however, a few special features you can do while performing this process. These are shown below

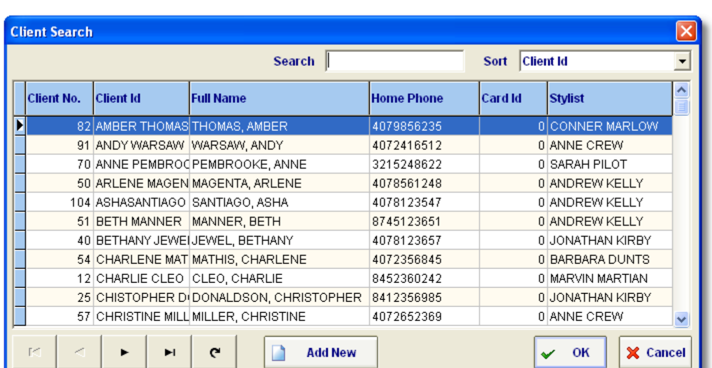
- You can continue to add Services and Packages to the Service / Package listing by repeatedly selecting from the "Select Service Package" field. The program will then scan for times it can concurrently schedule these services.
- If you selected more than one service, you may use the Process Order column to the right of the Selected Employee column to move individual items up or down the list. This will determine in what order the services will be automatically scheduled by Envision.
- 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. For example if you set "Days" to 3 and the "Start Search From" fields are today's date and 1:30 PM, the scan will search for available slots for the next 3 days but only FROM 1:30 PM each of those days! To search the entire day for the amount of days you have entered, change the "Start Search From" time to your opening time.

Step 1 - Select a Client

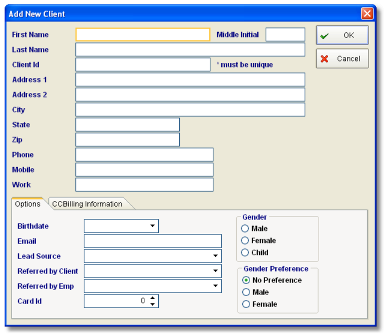
- **Client Id**

This field allows you to select a client if a client has not already been selected. 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 shown in the image below 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. Once a client is selected, their information will be displayed in the Client Selection area.

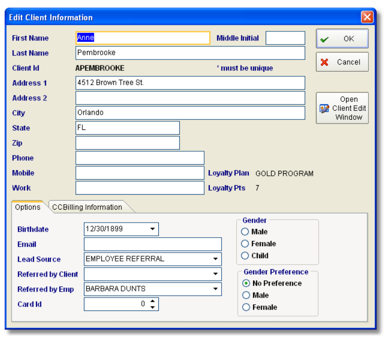


• Add Client Button



Click this button to add a client to your client list. The above screen will appear. Enter the information that the client provides and click the "OK" button.

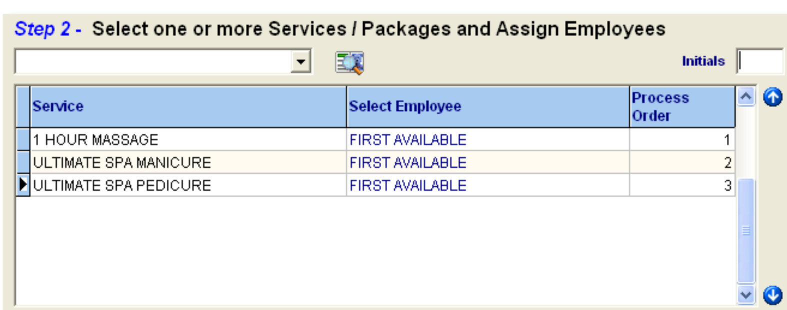
• Edit Button



Click this button to instantly access the client's information. Thi is very useful for changing telephone numbers, address, etc. "On the Fly".

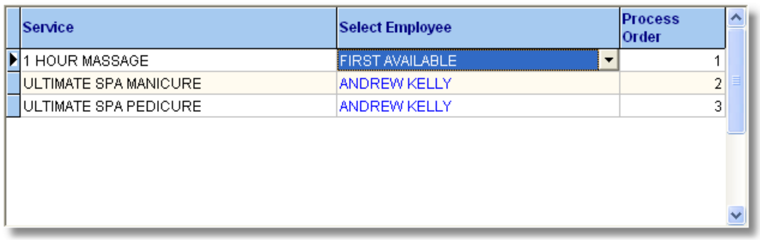
Step 2 - Select Services / Packages and Assign Employees

• Select Service / Package



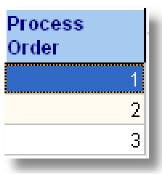
Select Service / Package. Once again, click the small button with the drop down arrow for a list of all your services and packages. Or you may click the small button next to it for a complete inventory list. You may select more than one service or package in this window.

- **Assign Employees**



Select an employee for each service or package shown. This is critical since the program will search forward in time only for open time slots for those employees. You may also select "Any" 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.

- **Process Order**

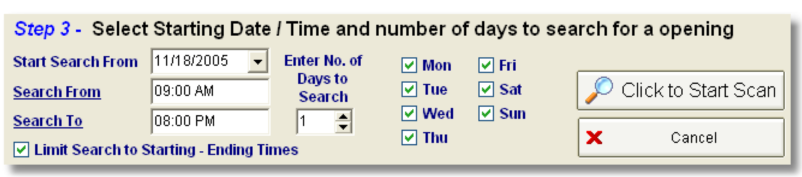


These fields allow you to specify the order of the services you are booking. For example, if you would like the first service to be booked as the second service, enter a 2 into the Process Order field. You may also right click on top of the services and click either "move up" or "move down" to move the selected (highlighted) service in the list.

- **Initials (Booked By)**

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 an appointment.

Step 3 - Select Starting Date / Time and number of Days



- **Start Search From**

The default is today's date and 12:00AM. If you wish to search for times starting at a specific time for the amount of days you enter, change this to that specific time. Change the date if needed.

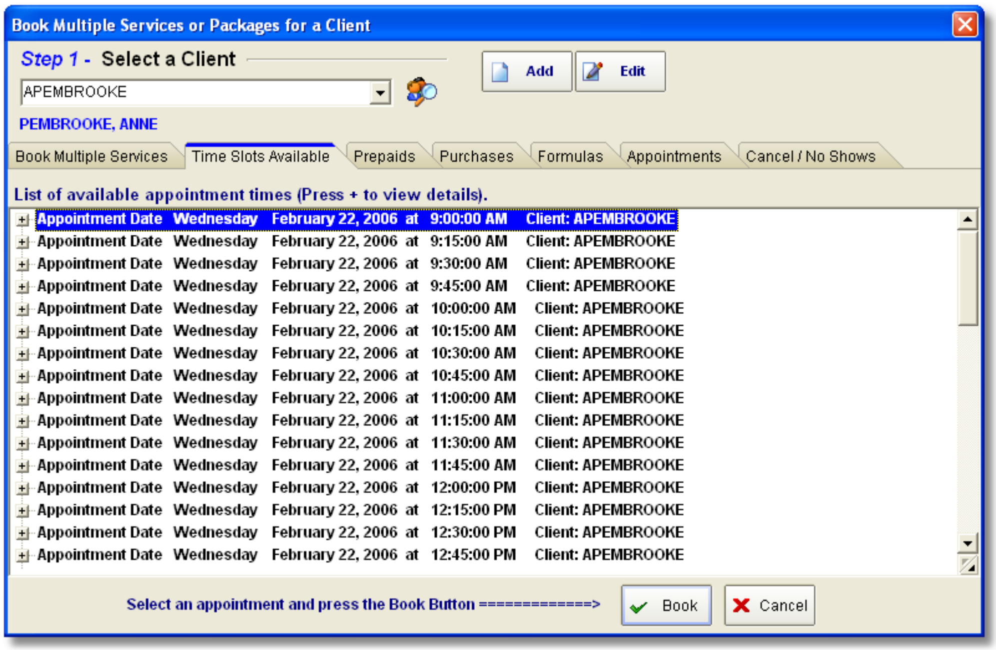
- **No. of Days to Search**

Select the number of days to scan ahead. Remember that the start Date and Time for each of these days to be scanned is determined by the "Start Search From" date and time you set.

- **Click to Start Scan Button**

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.

Time Slots Available Tab



Search Results

The result of the scan will be displayed here. Click on one that is suitable and click the "Book" button. 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.

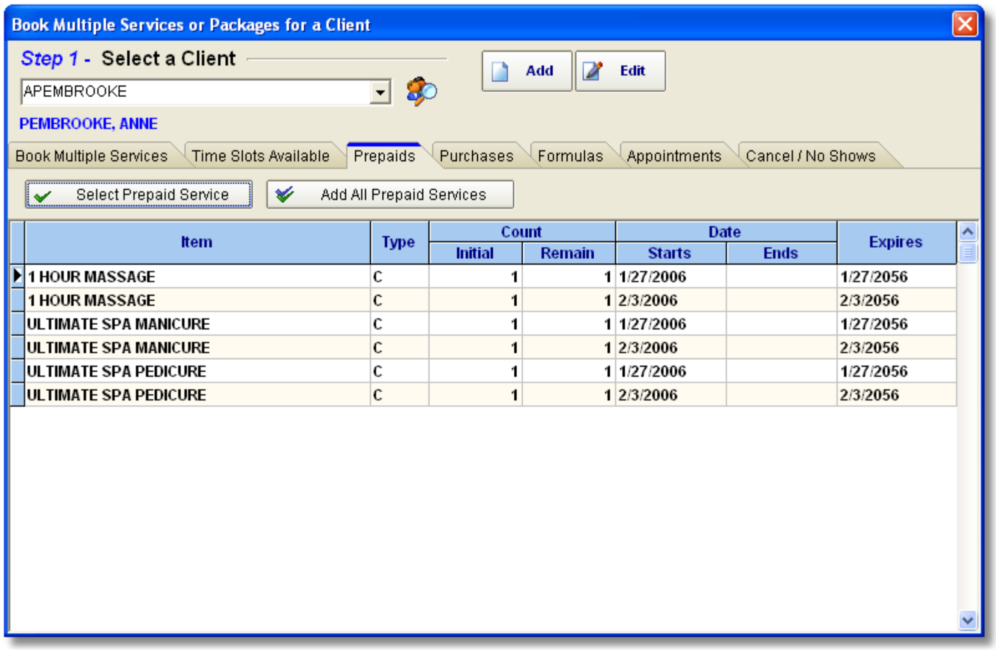
Book Button

This button will save ask you if you are sure you would like to schedule these appointments, schedule the services, and bring you back to the Appointment Calendar.

Cancel Button

Click this button to cancel any changes you have made and return to the Appointment Calendar screen.

Prepaids Tab



Use this screen to view a client's prepaid items. You may also select these items when scheduling appointments for the selected client.

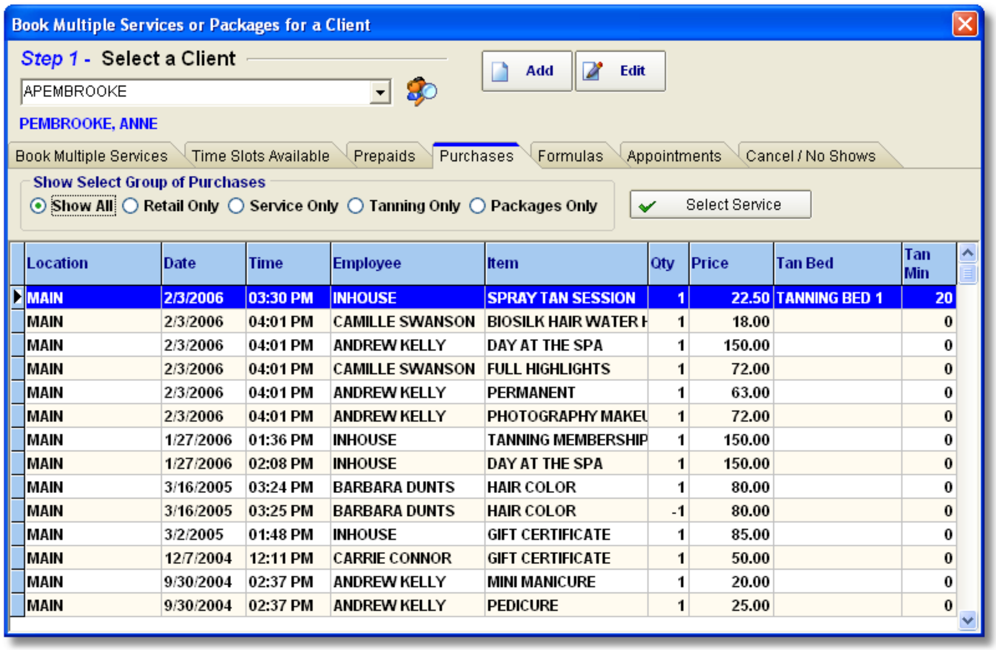
Select Prepaid Service Button

Click this button to select the highlighted service for the appointment you are booking. This option will automatically move the selected service to the "Book Multiple Services" tab into one of the Service Id fields.

Add All Prepaid Services Button

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

Purchases Tab



Location	Date	Time	Employee	Item	Qty	Price	Tan Bed	Tan Min
MAIN	2/3/2006	03:30 PM	INHOUSE	SPRAY TAN SESSION	1	22.50	TANNING BED 1	20
MAIN	2/3/2006	04:01 PM	CAMILLE SWANSON	BIOSILK HAIR WATER H	1	18.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	DAY AT THE SPA	1	150.00		0
MAIN	2/3/2006	04:01 PM	CAMILLE SWANSON	FULL HIGHLIGHTS	1	72.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	PERMANENT	1	63.00		0
MAIN	2/3/2006	04:01 PM	ANDREW KELLY	PHOTOGRAPHY MAKEU	1	72.00		0
MAIN	1/27/2006	01:36 PM	INHOUSE	TANNING MEMBERSHIP	1	150.00		0
MAIN	1/27/2006	02:08 PM	INHOUSE	DAY AT THE SPA	1	150.00		0
MAIN	3/16/2005	03:24 PM	BARBARA DUNTS	HAIR COLOR	1	80.00		0
MAIN	3/16/2005	03:25 PM	BARBARA DUNTS	HAIR COLOR	-1	80.00		0
MAIN	3/2/2005	01:48 PM	INHOUSE	GIFT CERTIFICATE	1	85.00		0
MAIN	12/7/2004	12:11 PM	CARRIE CONNOR	GIFT CERTIFICATE	1	50.00		0
MAIN	9/30/2004	02:37 PM	ANDREW KELLY	MINI MANICURE	1	20.00		0
MAIN	9/30/2004	02:37 PM	ANDREW KELLY	PEDICURE	1	25.00		0

Click this tab to view the products and services that the selected client has purchased. You may also schedule an appointment for one of the services listed.

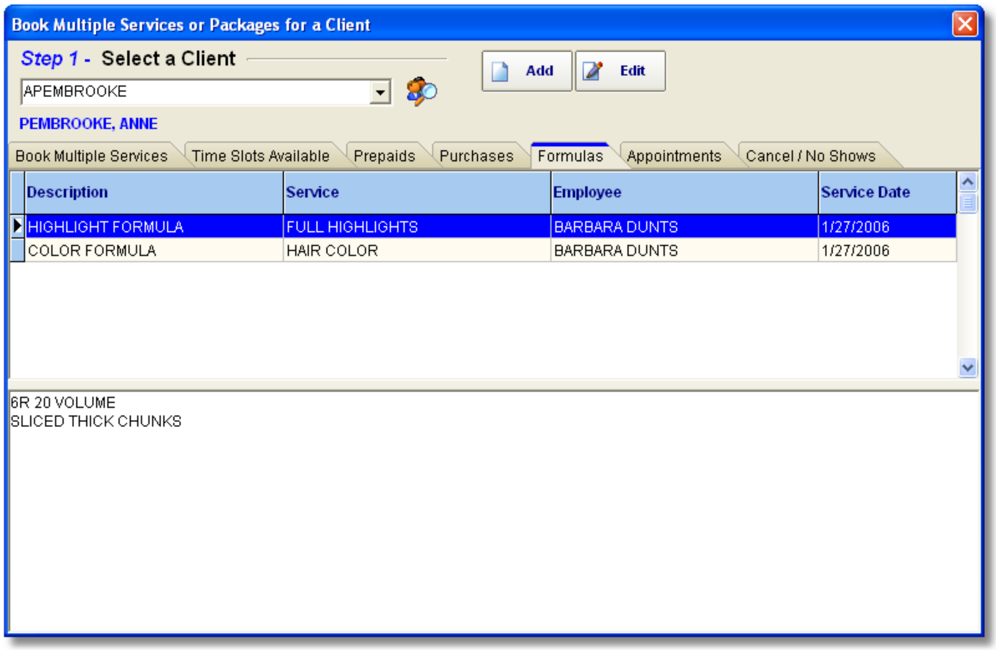
Show Select Group Of Purchases

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

Select Service Button

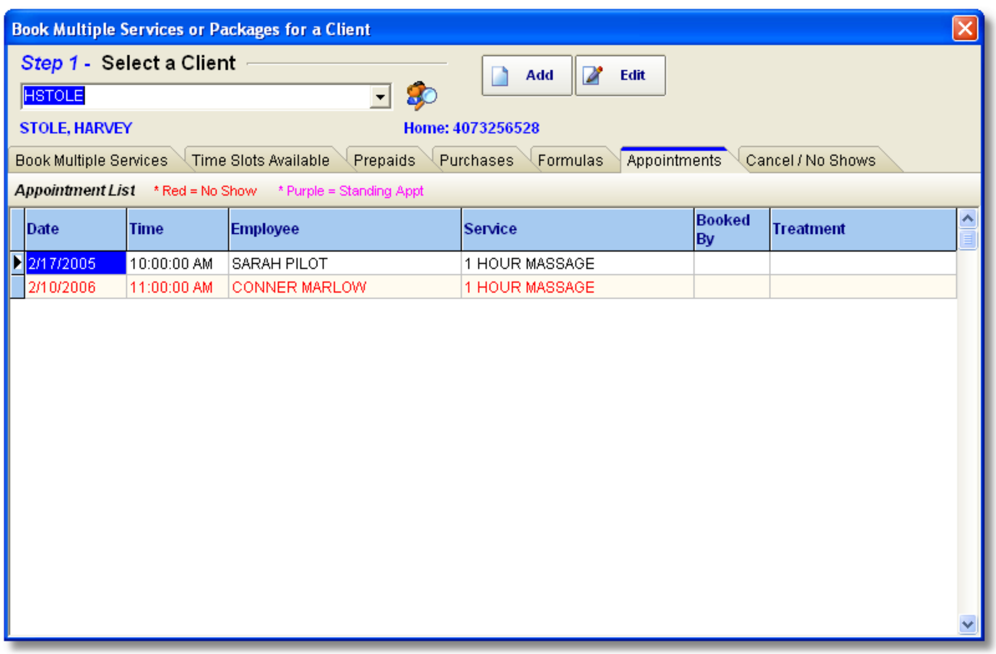
Click this button to select the highlighted service for the appointment you are booking. This option will automatically move you to the "Book Multiple Services" tab and the selected service will be entered into one of the Service Id field.

Formulas Tab



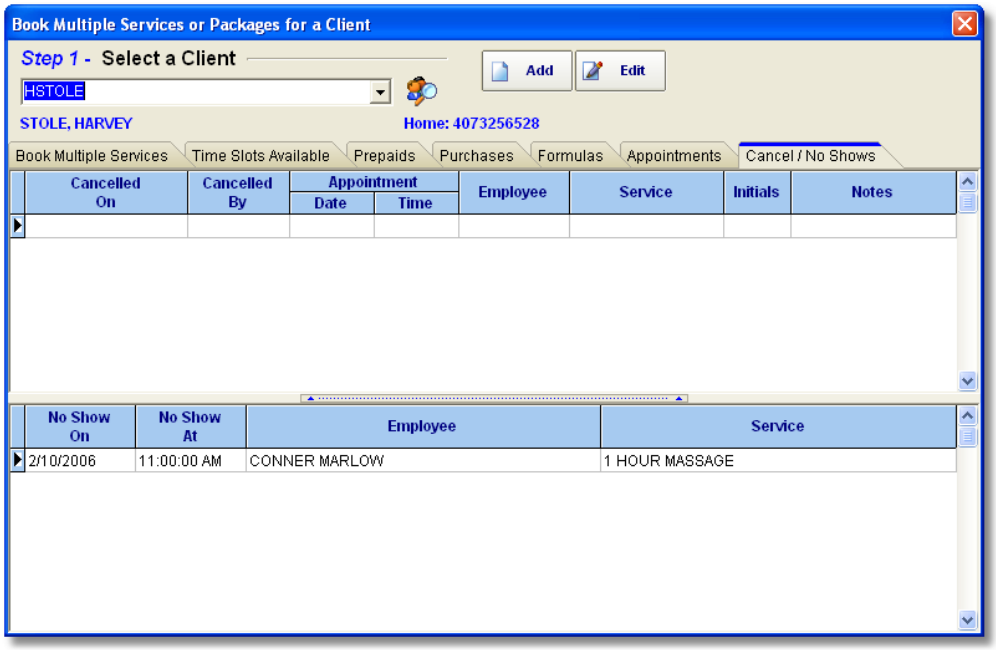
This screen is the same exact screen that is available on the Schedule Appointment window. You may use this screen to view clients' formulas.

Appointments Tab



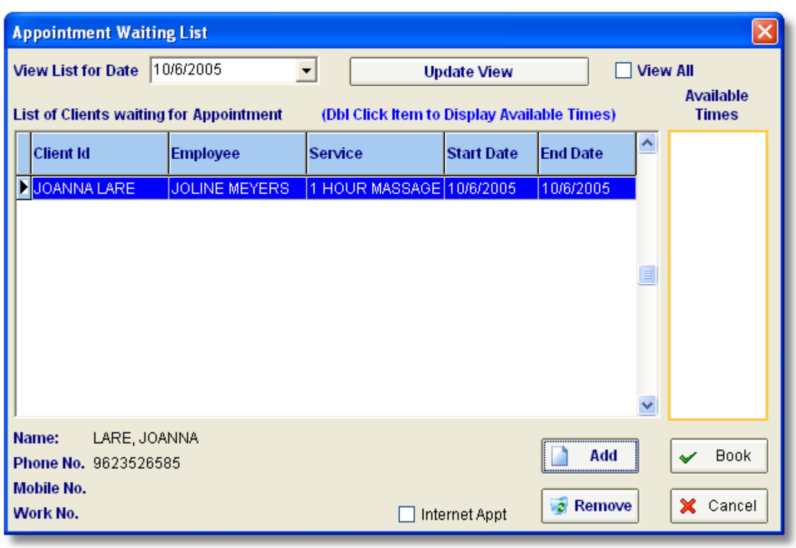
This screen can be used to view the client's list of appointments.

Cancellations Tab



This screen is the same exact screen that is available on the Schedule Appointment window. You may use this screen to view clients' cancellations.

Waiting List



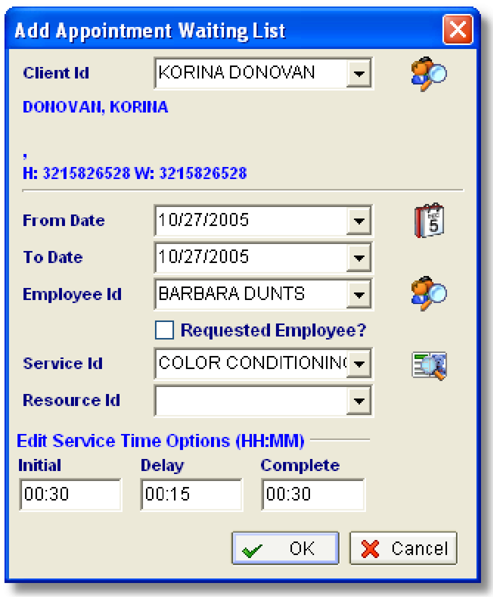
This screen allows you to view and manage the waiting list.

This screen can be reached by clicking on the "Waiting List" button below the calendars on the right hand side of the Appointment Calendar (shown above).

Add an Appointment to the Waiting List

Click the "Add" button as shown in the image above to add an appointment to the Waiting List.

The following screen will appear:



Client ID

Click the small drop down arrow to see a list of Client ID's and Names. If you wish to see a complete list click the small search button to the right of the Client Id field. A search list will open for you to select a client and you will also be able to Add a new client "on the fly."

From and To dates

These fields set the range of dates for how long the appointment will remain in the Waiting List. The From Date and To Date should be the same if you are adding a single appointment or if you are adding an appointment for one day.

Employee ID & Requested Employee

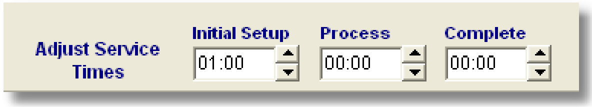
Click the small button and select from the drop down list the employee who will perform the service for this appointment.

If the client requests a specific employee, select the employee from the list as instructed above, then check the "Requested Employee?" check box. This will provide a warning at the time of the appointment if you try to move this client to another employee.

Service and Resource ID's

Select from the drop down lists the service to be performed for this appointment and if any resources are required (such as a massage bed), select this as well.

Edit Service Time Options



These three fields are available to schedule appointments for services that require a delay or if the service time needs to be changed. Enter the time it takes for the initial portion of the service, then the time for the delay and finally the time it takes for the final (Completion) portion of the service. When you enter a service into Inventory, you may insert a delay if required. For example, a hair color service may require a 30-minute wait with the color in the client's hair. Then you may need another 30 minutes to finish the appointment. The values you entered into Inventory are shown here. If for some reason you wish to change the times, you may do so in these fields (perhaps this employee needs closer to 30 minutes instead of 15 to finish the service).

Check Waiting List for Available Appointments

View List for Date

Select the date for which you would like to display appointments in the Waiting List.

Update View Button

The Update View button will refresh the screen when you change dates or Add / Remove clients from the list.

View All

Check the "View All" check box if you would like to view all appointments in the Waiting List.

List of Clients Waiting for Appointment

This area of the screen displays all the clients you have placed on the Waiting List. Double Click a name to see available times for the service the client is waiting for. Note: You must enter times that your employees are available in the Employee Schedule before Available Times will appear.

Available Times

Note: You must schedule your employees before available times will be displayed.

This area of the screen shows the time slots available for the date you select. After you select a client and service and enter the appointment in the Waiting List, viewing this screen will display available times that you can Book the client for. Double click the appointment in the list to see available times.

Client Information

The area below the Client Id field displays information about the client you have selected. You may edit the client's information from the Client List.

Remove / Book / Cancel Buttons

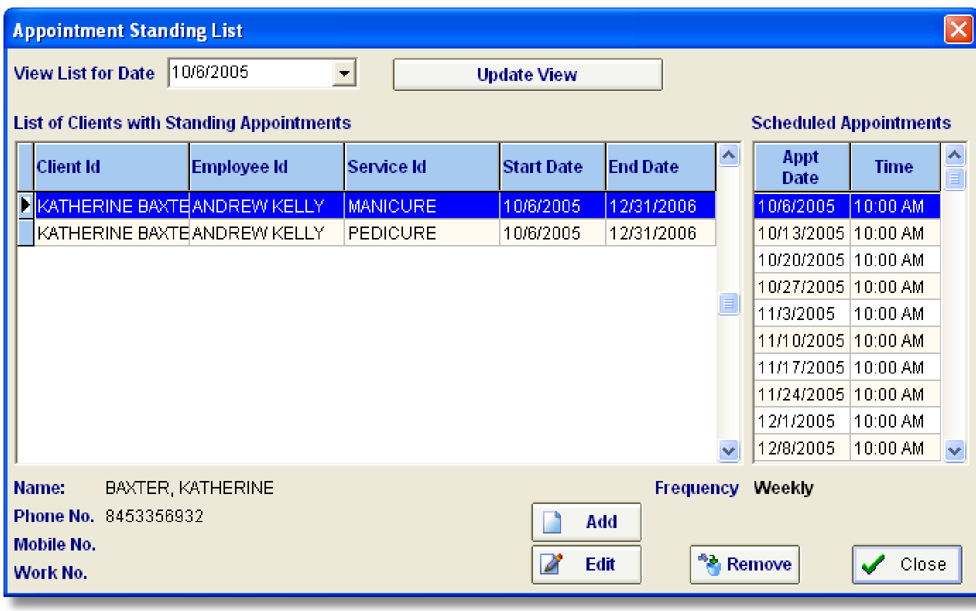
Select an appointment from the Waiting List by left clicking on the appointment.

You may click the "Remove" button to remove the highlighted appointment from the Waiting List.

To book an appointment from the Waiting List, double click on the appointment to display the available times. Select a time from the listing on the right and click the "Book" button.

Click the "Cancel" button to close this screen with no actions.

Standing Appointments



This screen allows you to manage your listing of Standing Appointments. This screen will allow you to add standing appointments to the Appointment Calendar.

Click the "Standing Appointments" button below the calendars on the right hand side of the Appointment Calendar (shown above).

Add a Standing Appointment

Click the "Add" button as shown in the image above to add a standing appointment.

The following screen will appear:

Client ID

Click the small drop down arrow to see a list of Client ID's and Names. If you wish to see a complete list click the small search button to the right of the Client Id field. A search list will open for you to select a client and you will also be able to Add a new client "on the fly."

From and To dates

These fields set the range of dates for the standing appointment.

Appointment Time

Enter the time of the appointment in the format 1:30PM.

Appointment Frequency

Select the frequency of the standing appointment from the drop down menu. If the client would like the appointment to be scheduled every week, "weekly" will be the frequency. If the appoinment will be scheduled every other week, the frequency will be 2 weeks.

Employee ID & Requested Employee

Click the small button and select from the drop down list the employee who will perform the service for this appointment.

If the client requests a specific employee, select the employee from the list as instructed above, then check the "Requested Employee?" check box. This will provide a warning at the time of the appointment if you try to move this client to another employee.

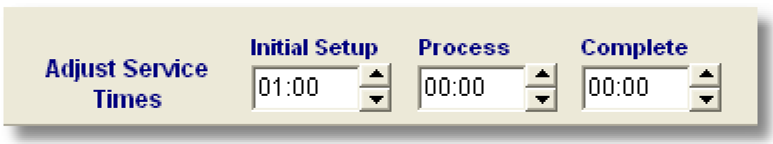
Service and Resource ID's

Select from the drop down lists the service to be performed for this appointment and if any resources are required (such as a massage bed), select this as well.

Edit Service Time Options

These three fields are available to schedule appointments for services that require a delay or if the service time needs to be changed. For example, you may do a wash then delay 15 minutes for dry time before styling. Enter the time it takes for the initial portion of the service, then the time for the delay and finally the time it takes for the final (Completion) portion of the service.

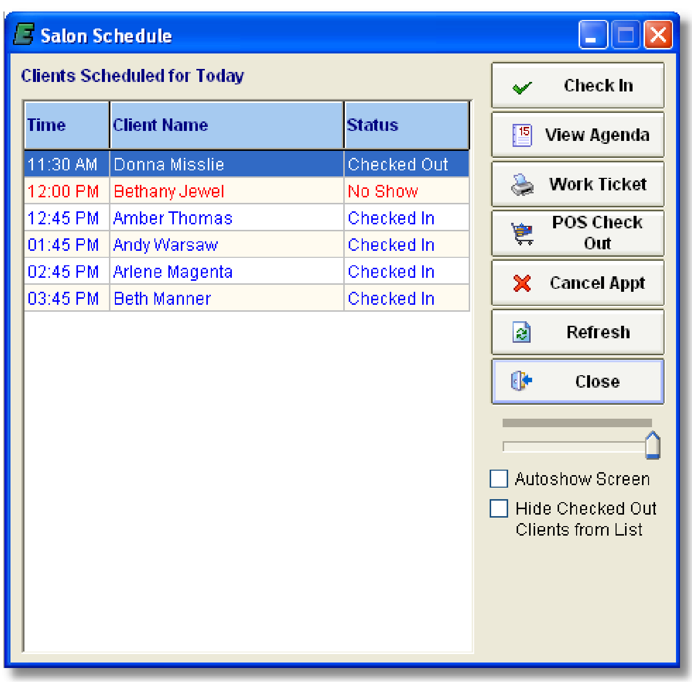
Edit Service Time Options



These three fields are available to schedule appointments for services that require a delay or if the service time needs to be changed. Enter the time it takes for the initial portion of the service, then the time for the delay and finally the time it takes for the final (Completion) portion of the service. When you enter a service into Inventory, you may insert a delay if required. For example, a hair color service may require a 30-minute wait with the color in the client's hair. Then you may need another 30 minutes to finish the appointment. The values you entered into Inventory are shown here. If for some reason you wish to change the times, you may do so in these fields (perhaps this employee needs closer to 30 minutes instead of 15 to finish the service).

Salon Schedule

This screen will pop up every time you open the Appointment Calendar if you have the "Autoshow" box checked. This screen is very useful if you would like to see a quick list of the appointments you have scheduled.



Salon Schedule List

This is the list of clients with appointments for the current day. The status of the appointment will appear under the status column to the right of the client's ID.

Check In Button

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

View Agenda Button

Click this button to open the selected client's agenda window. This will show information for all the services they have scheduled.

Work Ticket Button

Click this button to print a work ticket for the select client. The following window will appear. Select your options and click either the print or preview button.

POS Checkout Button

Click this button to check the client out. 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.

Cancel Appointment Button

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

Refresh Button

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

Close Button

Click this button to close the Salon Schedule window.

Transparency Bar

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

Autoshow Checkbox

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

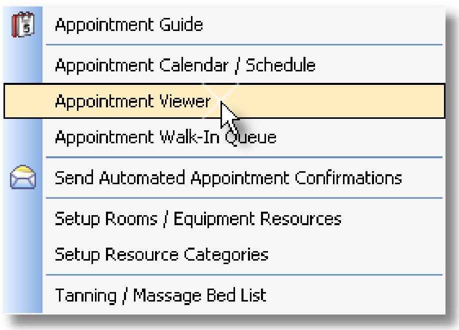
Hide Checked Out Clients

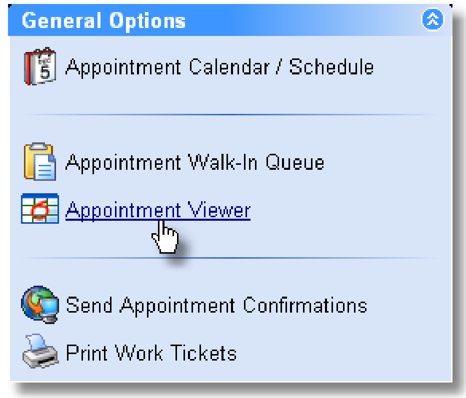
Check this option if you would like the checked out clients hidden on the salon schedule. This allows you to view a smaller list and only the appointments scheduled that have not been completed.

Appointment Viewer

The Appointment Viewer looks exactly like the Appointment Calendar, however you are not able to add or edit appointments or make any changes in this screen except for Blocking Employee Time.

The Appointment Viewer can be reached by clicking on "Appointment" on the Menu Bar and selecting "Appointment Viewer" from the drop down menu. You may also click on "Appointment Viewer" under "General Options" on the Appointment Guide window.



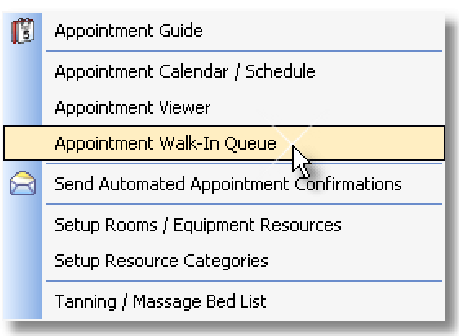


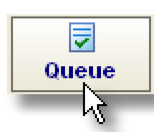
The Appointment Viewer is for viewing purposes only, however you do have some right click menu options available. These options will allow you to print schedules, view the client's next appointment, view the client's agenda, etc.

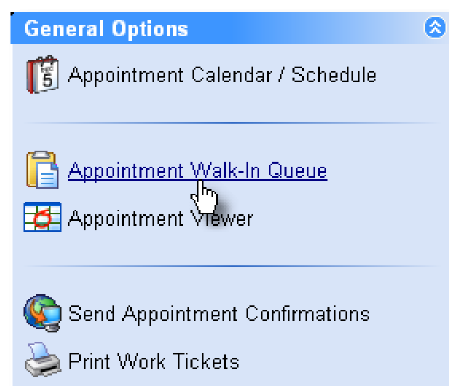
Appointment Queue

The Appointment Queue allows you to add Walk-In clients to a list without having to book an appointment for them in your Appointment Calendar. You will not need to add the walk-in client to Client List if you use the Appointment Queue.

To enter the Appointment Queue, click on "Appointment" from the menu bar and select "Appointment Queue" as shown in the image below. The Queue can also be reached by clicking on "Appointment Walk-In Queue" under "General Options" on the Appointment Guide window or click on the "Queue" button located on the Tool Bar.







Add New

Click the "Add New" button to add a Walk-In client to the Queue.

Edit

Click the "Edit" button to edit a Walk-In appointment that is already listed in the Queue.

Start Service

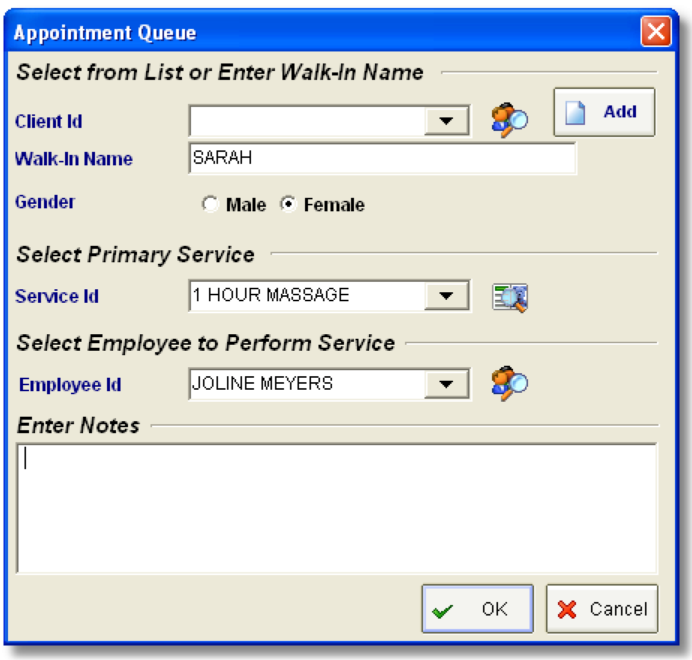
Click the "Start Service" button to mark the time that the service was started for the highlighted appointment in the list.

Check Out

Click the "Check Out" button to transfer the Walk-In client's service to the Point of Sale so that you may take their payment.

Add New

Click the "Add New" button at the top of the Appointment Queue to open the following screen:



Client Id

If the Walk-In Client is in your client list you may select them for the appointment or you may add the new client to your list. Click on the "Add" button to do this.

Walk-In Name

If the Walk-In Client does not want to be added to your client list, enter a name in this field and select their gender.

Select Primary Service

Select the service that they have come in for.

Select Employee to Perform Service

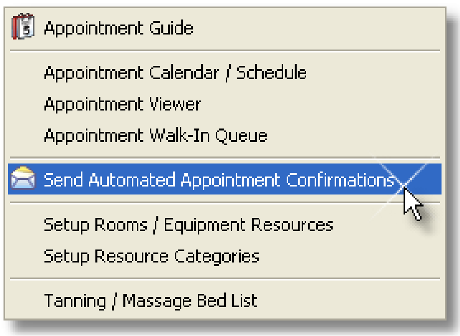
Select an employee that is available for this service.

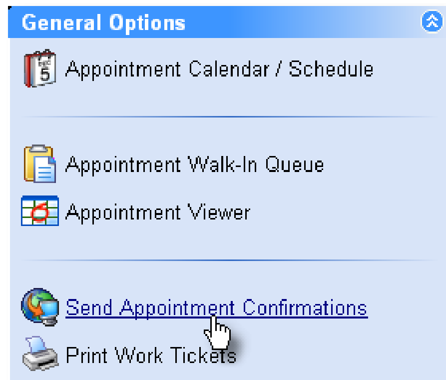
Click the "OK" button to add this Walk-In appointment to the Queue.

Send Email Confirmations

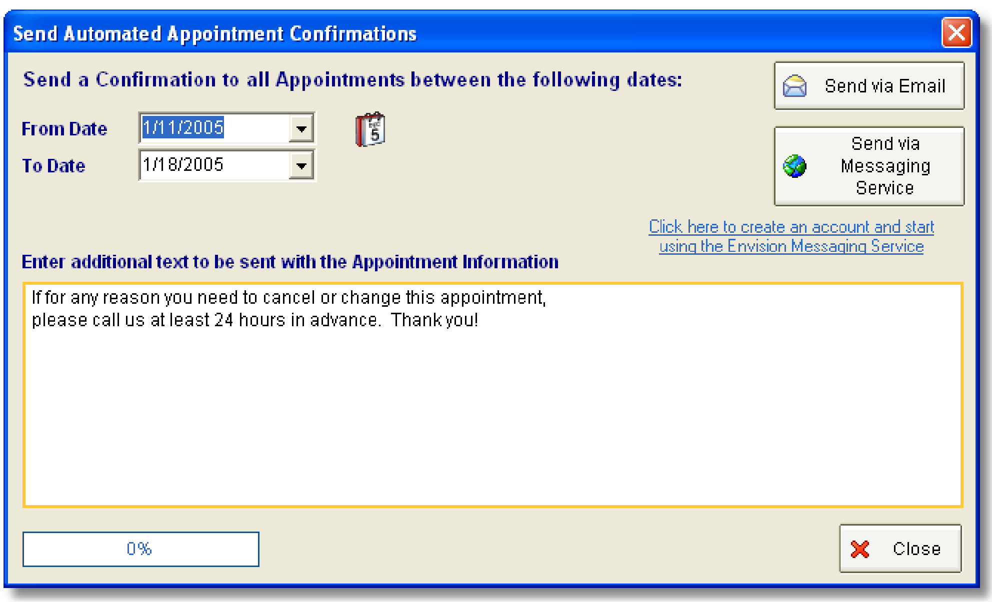
This screen allows you to send a mass emailing to all appointments between a set of dates you choose. This is the reason to get an email address for every client.

The Email Confirmations window can be reached by clicking on "Appointment" on the Menu Bar and selecting "Send Email Confirmations" from the drop down menu. This screen can also be reached by clicking on "Email Appointment Confirmations" under "General Options" on the Appointment Guide window.





As shown on the sample screen below, it's intended purpose is to ask for appointment confirmations to reduce the number of no-shows. You must be connected to the Internet before clicking the "Send" button.



From Date / To Date

You may manually enter the "From Date" and "To Date" or click the small calendar button and use the two calendars below to set the range of dates for this screen. This calendar screen appears throughout the program to make it quick to set a "From / To" range of dates.

Email Text Message

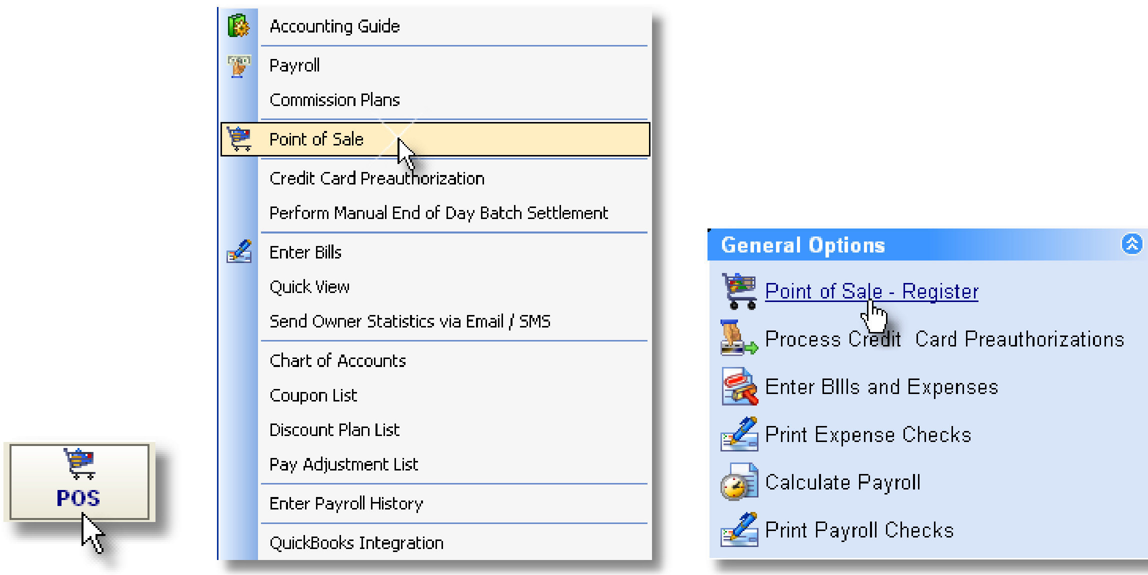
Enter the message you would like to be sent to all recipients of this email. Each client will receive this exact message in their email inbox.

Point of Sale

Invoice

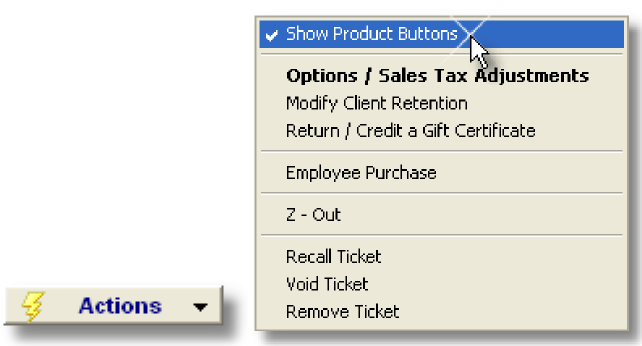
This is also one of the most used windows of the program. From here you sell every product including Gift Certificates. If you've equipped your station with a cash drawer, display pole, and receipt printer, they will be controlled from this screen.

The Point of Sale window can be reached by clicking on the "POS" button, located on the Tool Bar or you may click on "Accounting" on the Menu Bar and select "Point of Sale" from the drop down menu. This window can also be reached by clicking on "Point of Sale Window" under "General Options" on the Accounting Guide window.

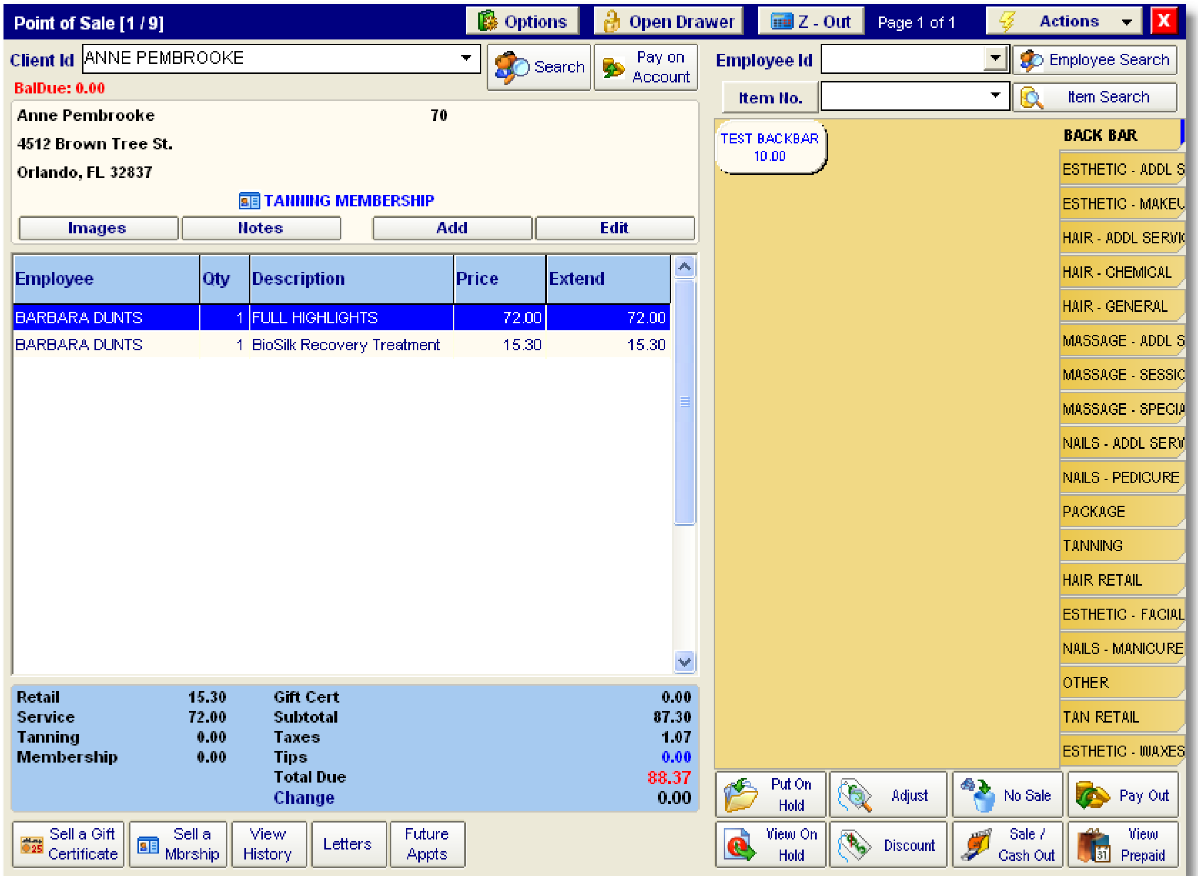


You can view this screen 2 ways.

Click the Actions button and choose to display either with product buttons or without. Displayed on the following image is the view with product buttons.



The view with product buttons is used for touch screen monitors. Both views work exactly the same, but the view without product buttons gives more details about the products. Also, if you sell hundreds of products the display below might become too cluttered. However, you may find that it is easier to click on a button when selecting a service or retail product compared to searching for the item with the "Item Search" button.



The Client must be selected for this invoice if you are selling any product that is a "Package". Also you need to select a client if you are selling 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: Click the "Add New" button to quickly add a client "On the Fly".

Client Display Area

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 Information

An Employee must be associated with each sale. This might only be the cashier, but the cashier 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 Search

Click the Item Search button and select the product you wish to sell from the listing. If you have chosen "Display Product Buttons" from the Actions menu, you may use the buttons instead. The button to the left of the item selection field can display either Item Id, Item No. or Barcode. If the button displays "Item Id" you may start typing in the Item Id of the service, product, or package you would like to select and the program will narrow down the search with each character you type in. If the button displays "Item No.", you may type in the Item No. When the button displays "Barcode" you may scan the product's barcode when your cursor is blinking in this field. The product will automatically appear in the Invoice area to the left.

Department Tabs

The tabs below the Item Search button represent the Departments 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.

Product Buttons

The buttons to the left of the Department tabs represent the products for the Department selected. Click the Product you want and it will automatically be entered on the invoice at the left.

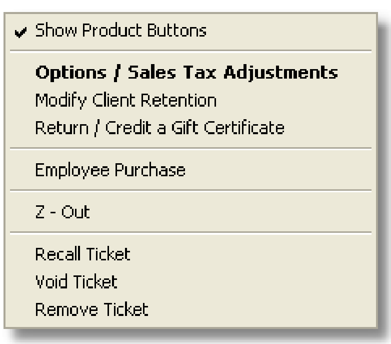
Invoice Listing

This area of the screen (below the Client Information 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 "Show Product Buttons" on the Actions menu.

Invoice Breakdown

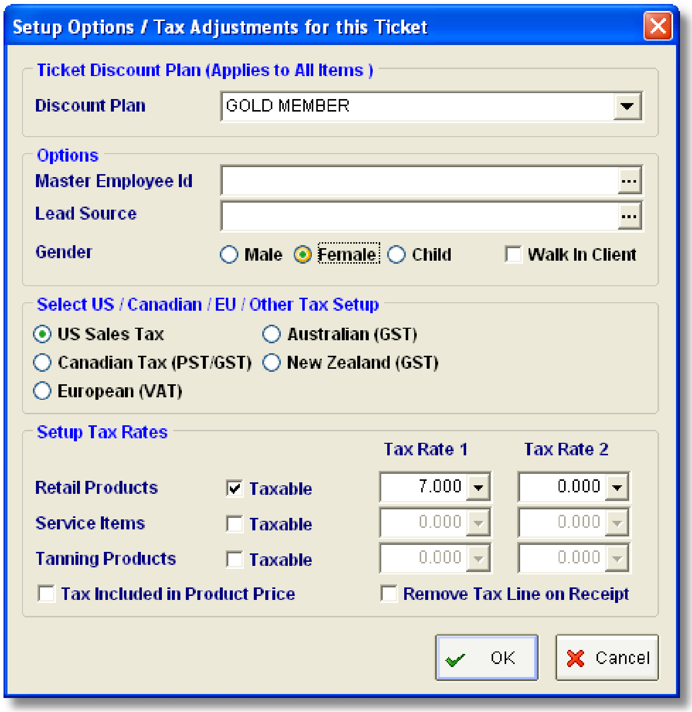
This area of the screen (below the Invoice Listing) displays a detailed breakdown of the sale in progress. It instantly updates with changes you make.

Actions Menu



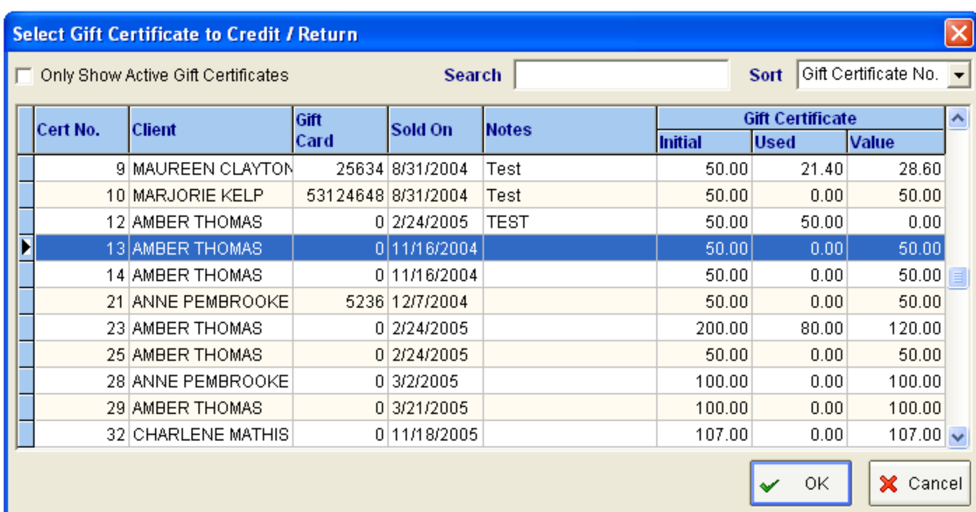
This menu allows you to change the display from showing the large Product buttons to using a Product listing. On the following page is information about the options available from this "Actions" menu.

Options / Sales Tax Adjustments



Select this option to change the Sales Tax setup for the ticket that is open or to apply a Discount Plan that you have entered in the system.

Return / Credit a Gift Certificate



Select the Gift Certificate that needs to be returned or credited.

Employee Purchase

Check this option to apply an employee prices to the items selected in the invoice area.

Z-Out

Select this option to open the Z-Out screen. This screen can also be accessed by clicking on the "Z-Out" button to the left of the "Actions" button.

Recall Ticket

Choose this option to make changes to a ticket that has already been cashed out. You may add items to the ticket, change any of the employees that are associated with any of the items in the ticket, change the price of the items or discounts, tips that have been entered, as well as the payment types. The changes that you make to the ticket will not affect the current drawer, only the drawer that the ticket is in. This option requires the Manager Override Password.

Void Ticket

Voiding the ticket will make the total amount due a negative amount. History of this ticket will remain in the program. This is an option that you may choose if you would like to void the transaction and credit the amount back to a client's credit card account. You must enter the Manager Override Password for this selection as well.

Remove Ticket

Removing a ticket will delete the transaction from the history. There will be no trace of the selected transaction. You will be required to enter the Manager Override Password.

Point of Sale Buttons

Sell a Gift Certificate Button

Click this button to sell a gift certificate through the Point of Sale. The following screen will appear for you to enter information about the gift certificate that is being sold. A client must be selected in the POS before clicking this button.

1. Enter who the Gift is for. 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 "Gift Certificate" button on the POS screen, you must select the

client who is purchasing this gift 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. Enter the Employee 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.

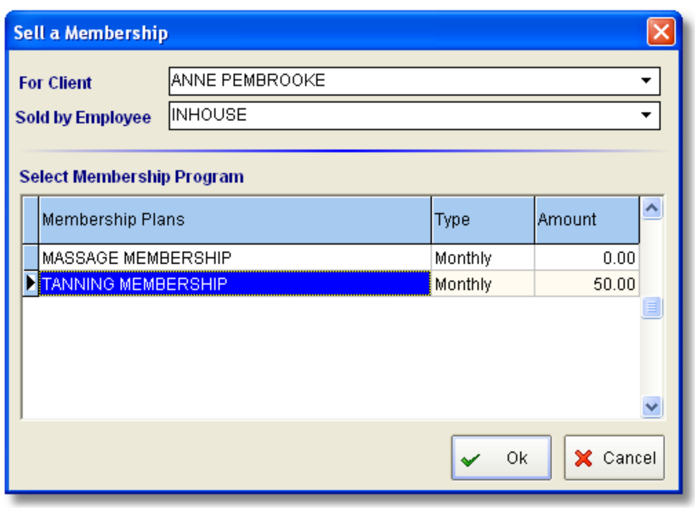
3. Enter the Amount of the Gift Certificate. Click the small button for a calculator, or just enter the amount directly.

4. 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. You definitely want to set a firm date the Gift Certificate expires. This encourages the recipient to visit your store, and prevents the certificate from being redeemed extremely far into the future.

5. The "Gift Card #" field allows you to enter your own choice of gift certificate numbers. If you leave this blank the program sequentially numbers the Certificates as you sell them. This is useful for pre-printed Gift Certificates with serial numbers.

Sell a Membership

Click this button to sell a Membership to a client. The following screen will appear for you to enter information about the Membership Program that is being sold.



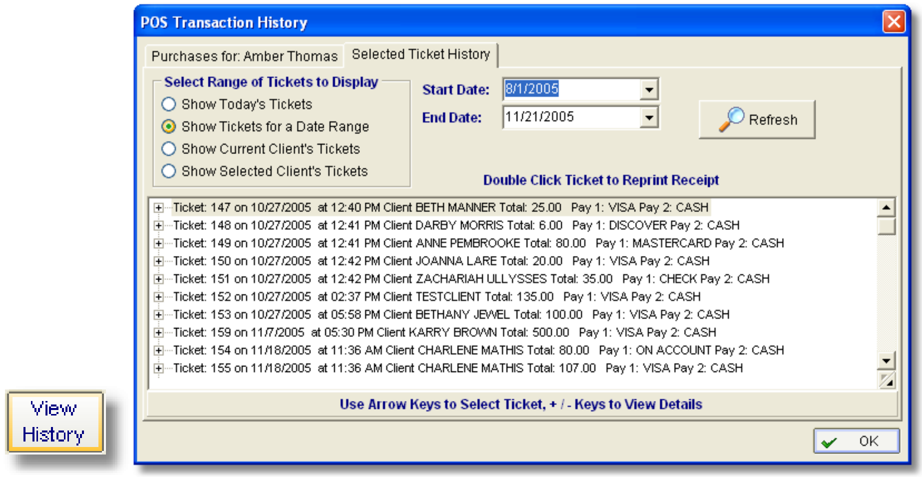
1. Select the Client that Membership Program is being purchased for.

2. Select the "Sold by Employee".

3. Select a Membership Program from the list (must be setup first).

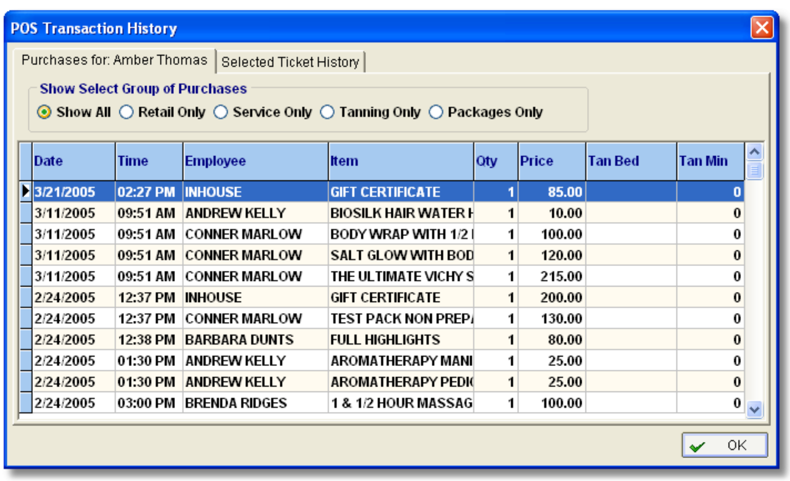
4. Click the "Ok" button.

View History Button



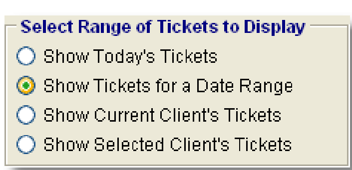
This screen provides a convenient way to view a history of transactions that have occurred on this POS station. Click the areas below to see how to view history by Date or Customer.

- ***Product Sales Tab***



This screen displays a list of purchases by this client. Click the "Selected Ticket History" to see more information about all sales tickets.

- ***Select Range of Tickets to Display***



Show Today's Tickets: Click this choice to see all the transaction for the current date. When selected the 3 fields to the right (Start/End Date and Customer #) have no effect.

Show Tickets for a Date Range: When selected you must select a Start Date and End Date to establish the range of dates.

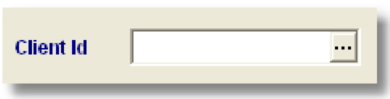
Show Current Client's Tickets : This choice will show all tickets for the client selected on the POS screen. The 3 fields to the right (Start/End Dates and Customer #) have no effect when this option is selected.

Show Selected Customer's Tickets: When you choose this option you must select a customer using the "Client Id" field to the right. Click the small button in that field and select from the list of clients.

- ***Start and End Dates***

Enter dates into these fields (use the small button in each field to show a calendar). These fields will only appear when you have selected "Show Tickets for a Date Range".

- ***Client Id***



Click the small button in this field and select a client. All the tickets for this client that are in the system will be displayed below. This field will only be displayed if you have chosen "Show Selected Client's Tickets" to the left.

- ***Refresh Button***

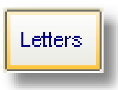
Click this button if you change your choice under "Select Range of Tickets to Display" at the left of this screen. This will force the system to parse through the system and update the tickets displayed to match your request.

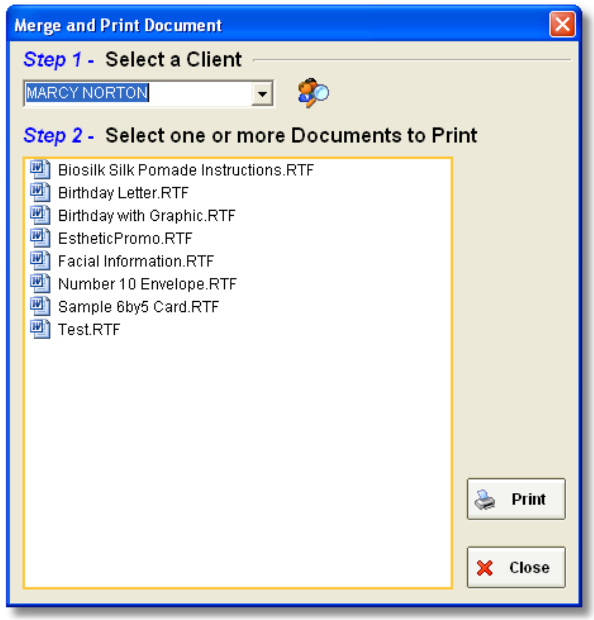
- ***Transaction Listing***

This area of the screen will display all the transactions that match the criteria you have chosen using one of the 4 "Select Range of Tickets to Display" choices in conjunction with the "Start Date, End Date, and Client Id"

Click the small "+" sign next to an item to see more details about that item.

Letters Button





This screen 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.

- ***Step 1 - Select a Client***

Select the client that you would like to print a document for. You may click the search button to the right of this field if you would like to select the client from a list or if you need to add a client to the listing. The client that you have selected in the Point of Sale will automatically appear in this field.

- ***Step 2 - Select a Document to Print***

Select a document from the list. If you do not want to use any of the documents in this list, you may create a document with the program's Word Processor.

- ***Print / Close Buttons***

Click the "Print" button to print the selected document for the client you have selected.

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

Future Appointments Button

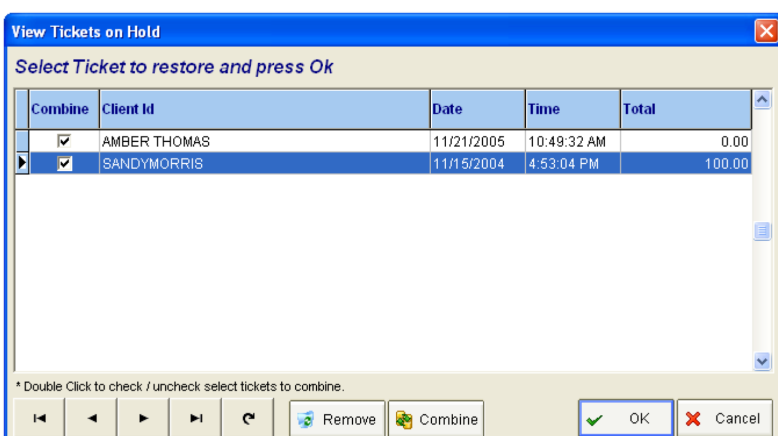
Click this button to view the selected client's future appointments. The screen shown below will appear with a listing of the selected client's future appointments. This feature is useful for situations when a client may ask when their next appointment is.

Put On Hold Button

This button allows you to store a 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.

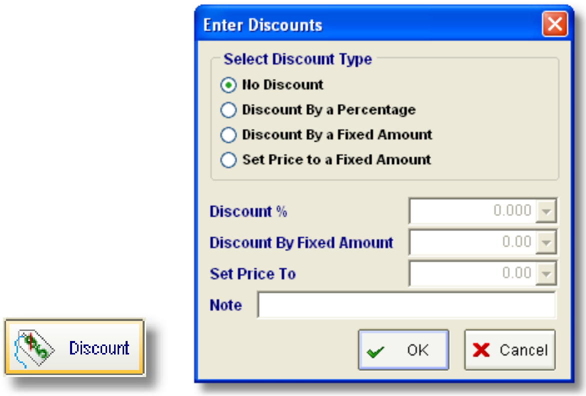
You may also use this button to combine tickets. When you place more than ticket "On Hold", you have the option to select the tickets that you would like to combine. This is useful when you have clients that came together on two seperate tickets. This feature will allow you to place both clients' transactions on one ticket.

View On Hold Button



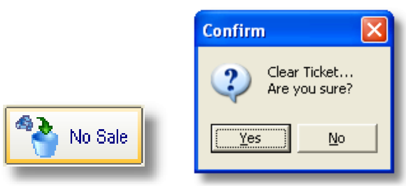
Click the "View On Hold" button to restore a ticket or to combine more than one ticket. To combine tickets, double click each ticket to place a check in the "Combine" box next to the ticket and click the "Combine" button. Click "Ok" button when you are asked if you would like to restore the on hold tickets.

Discount Button



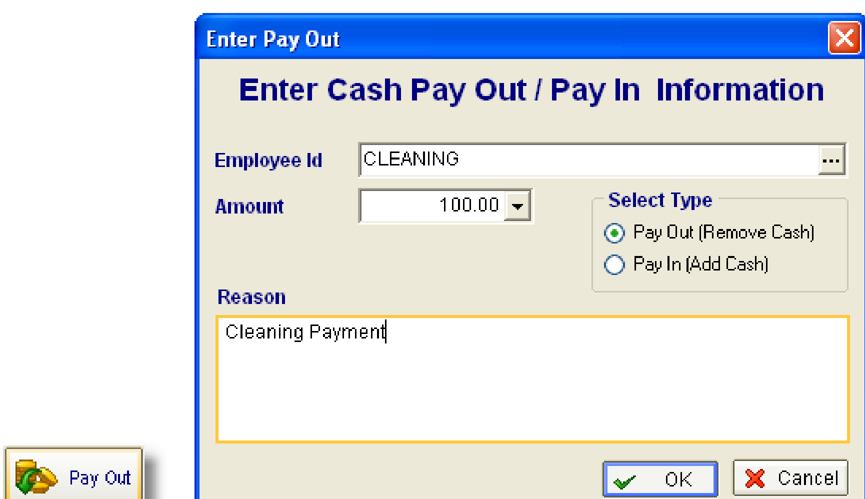
This screen allows you to apply a discount to this sale on the fly. When you select one of the 4 choices at the top of the screen you determine which of the fields at the bottom of the screen is activated. If you select "No Discount" none of the fields work. If you select "Discount By a Percentage" then 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.

Pay Out Button

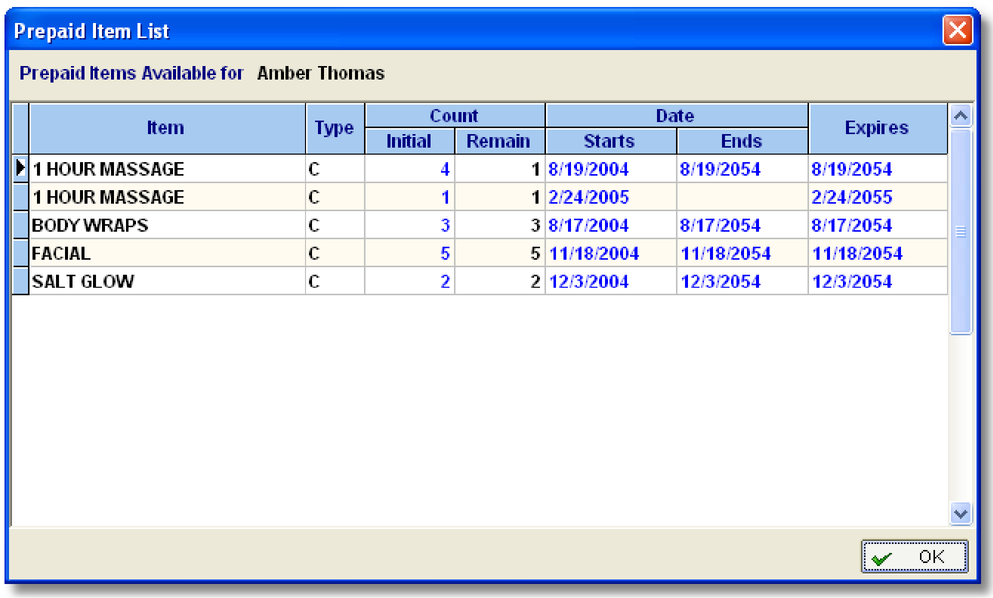


Click this button to make Cash Payouts and Pay Ins from the cash drawer. You may need to do this if you are paying somebody with cash from your drawer or if you need to pick something up at your nearby supply store and the money you are using to purchase the items you need you will be removing from the cash drawer. As shown on the screen shot below, 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 check box for 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. A sample of the screen is shown below. Not all fields are applicable to all prepaid packages or items but are shown here with data for explanation purposes.

ITEM: What prepaid package or item was purchased. There can be more than one and hopefully will be many.

TYPE: Type will display "C" or "W" depending upon whether you selected "Count" or "Weeks" when you entered this product into inventory. If a client chose to prepay for an item that is not part of a package and the quantity is more than one, the type will be "C" for "Count" as well.

COUNT Initial: If the Prepaid Package was entered into Inventory as a Count, the initial count when purchased is shown here. An example of a Prepaid item that is purchased by count could be, Hair Cut - Blow Dry Package (5). When entered into inventory this Prepaid Package would reduce the price of this service if the customer paid for 5 of them in advance. The "Initial" field would display 5.

COUNT Remaining: For Prepaid items measured by Count, this field shows how many are left in this Package.

DATE Starts: If the Prepaid Package is measured by days, this field displays the starting date for the Package. For example, if you created a Prepaid Package in Inventory that gave 1 years worth of Manicures for a discounted price, the customer would be able to have unlimited manicures for the year starting on this date.

DATE Ends: This field shows the ending date for Prepaid Packages that are measured by time.

EXPIRES: This date is used for limiting how long a client can use the Count in Prepaid Packages that you entered into Inventory that are measured by Count. For example, the COUNT Initial paragraph above described a Hair Cut - Blow Dry package that allowed 5 of this service. If you wanted to limit the time the customer could take to use all 5 of the Hair Cut - Blow Dries, you would enter the number of weeks the package was good for when you added it to your Inventory.

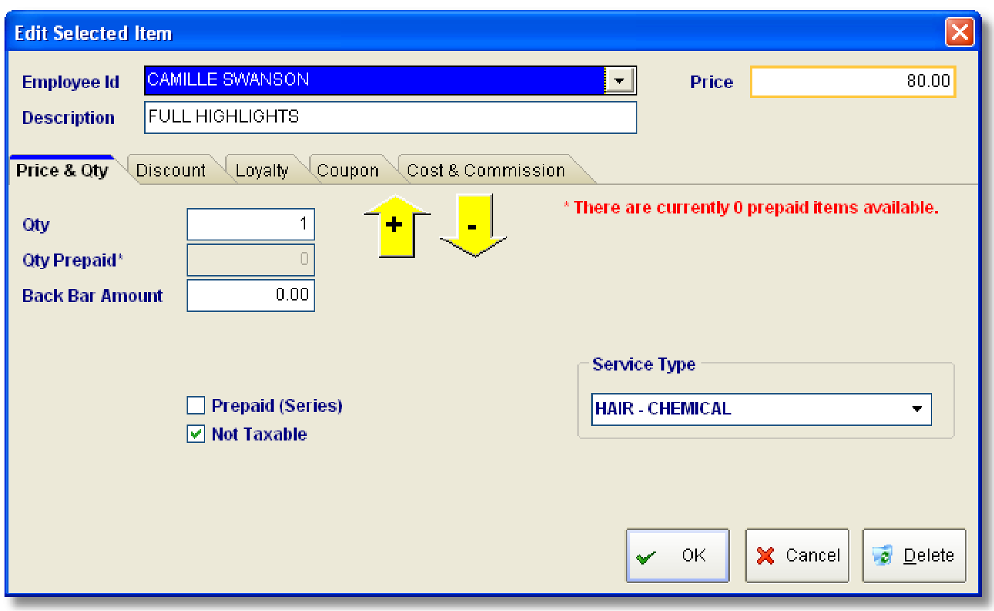
- **Sale / Cash Out Button**

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.

Adjust Button - Service Item

Price and Qty Tab

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 the item to open the window shown below. Make any adjustments you wish or even click "Delete" to remove the item from the Invoice. You will see the below screen when a client has been selected and when the selected item type is a service.



Adjust Employee Id

You may use the drop down arrow to select a different employee for the sale of the selected item.

Adjust Price

You may edit the price of the selected item if needed. The price will be grayed out if the item that is selected is set to have no price overrides.

Adjust Quantity / Quantity Prepaid

You may use this field to adjust the quantity of the selected item you are selling. Use the yellow arrows to adjust the quantity if the client is prepaying for these items. This will automatically change the quantity in the "Quanitity Prepaid" field.

Adjust Backbar Amount

Enter an amount into this field if a specific dollar amount is used for backbar for the selected service. This amount will be added to the cost of the service when you run a sales report and check the option "Display cost and profit figures on the report". The cost amount displayed in these reports are a total of the labor, overhead, and back bar costs for the service.

Prepaid Selection

Check this box if the client is prepaying for the selected item / items.

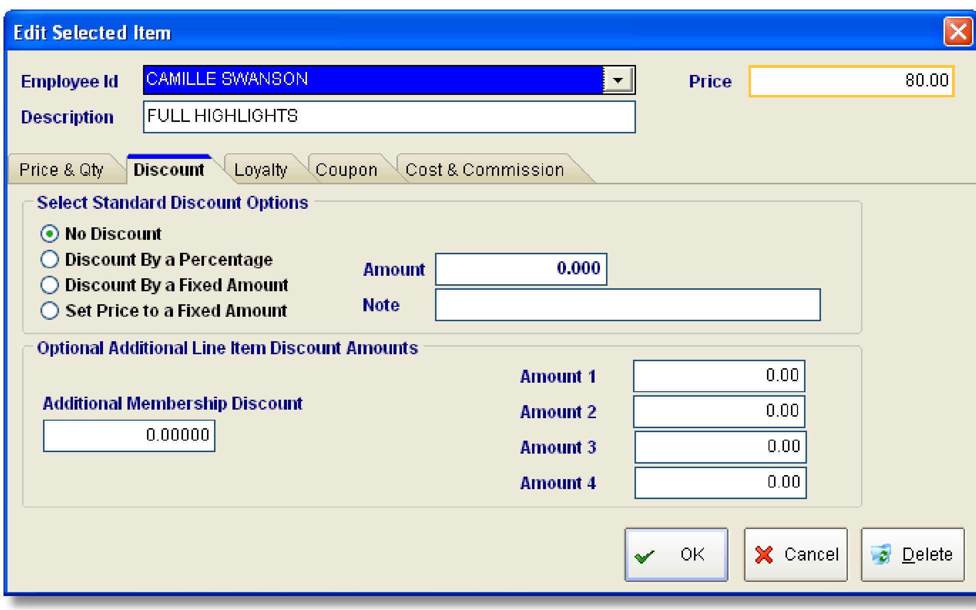
Non-Taxable Item

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services.

Service Type

The Service Type is used by salons that work with KRS Consulting. You do not need to select a Service Type if you are not working with KRS. This Service Type must be set for each service so that KRS reports can be generated with accurate information about the services that have been sold.

Discount Tab



Discount Type

When you select one of the 4 choices provided, you determine which of the fields to the right 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, "Set Price To".

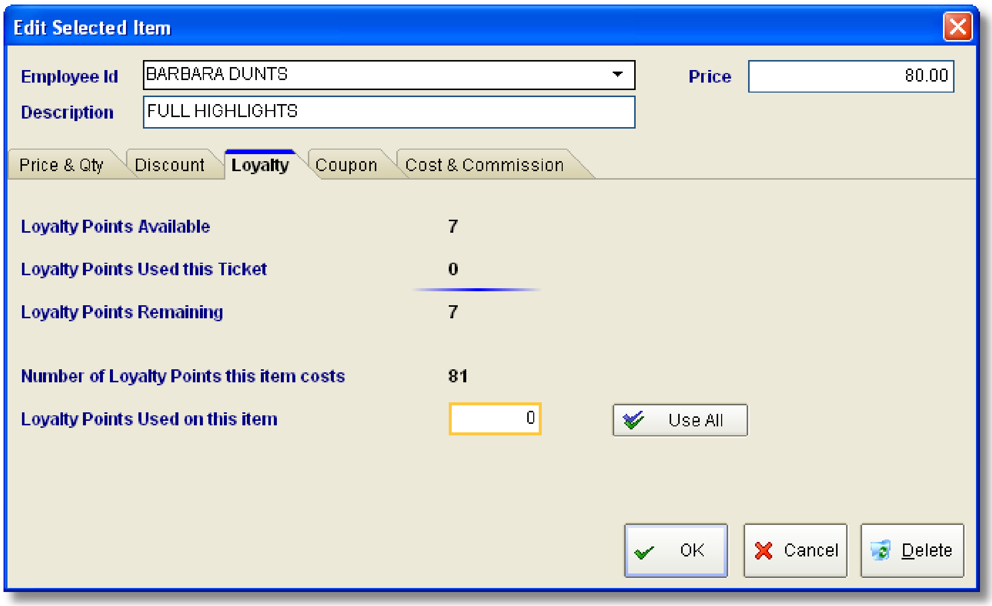
Discount Amount

Enter the amount of the discount depending on the type you selected on the left.

Discount Note

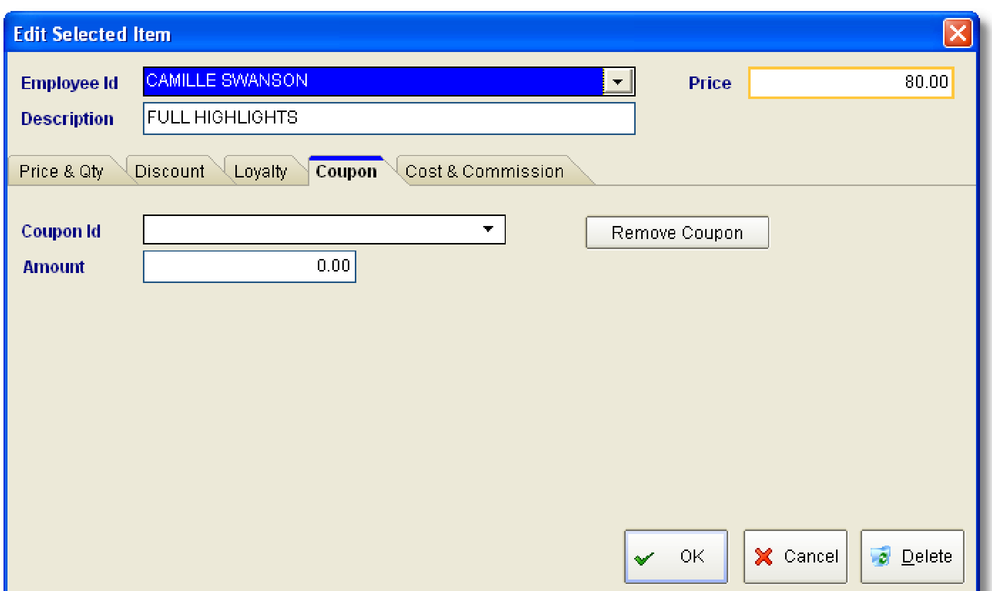
Enter a note for the discount if you need to keep information on record for the discount you are applying.

Loyalty Tab



This screen allows you to use Loyalty Points that a client may have available for the item selected.

Coupon Tab



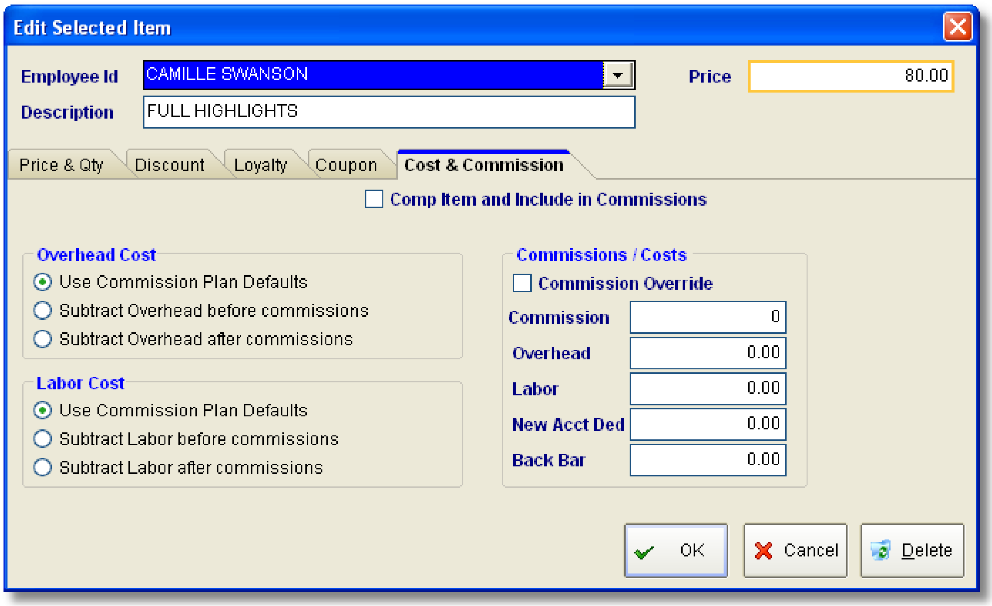
Select Coupon ID and Enter Amount

Select the Coupon that you would like to apply from the drop down list. The coupons available in this list can be created in the program's "Coupon List". This list can be reached by clicking on "Accounting" from the menu bar and selecting "Coupon List" from the drop down menu. Enter a new amount if the amount entered for the coupon is not correct for the amount you wish to apply to the selected item.

Remove Coupon Button

Click this button to remove the coupon. The amount to be discounted will no longer apply.

Cost & Commission Tab



Comp Item and Include In Commissions

Check this box to comp the item (sets the price to a zero dollar amount) and the employee that is associated with the item will receive full commission on the original price of the item.

Commissions / Costs

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 to the immediate left of these fields. 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.

Overhead / Labor Costs

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 amount you will subtract is set in the fields to the right under "Commissions/Costs". Enter a dollar amount into either or both of the "Overhead" or "Labor" fields.

Click "Neither" for no subtraction.

Click "Subtract Overhead / Labor before commissions" to subtract the dollar amount from the total sales of this item before calculating the ommission.

Click "Subtract Overhead / Labor after commissions" to take the dollar amount directly from the calculated commissions.

OK / Cancel Buttons

Click the "OK" button to save your changes or the click the "Cancel" button to cancel the changes you have made.

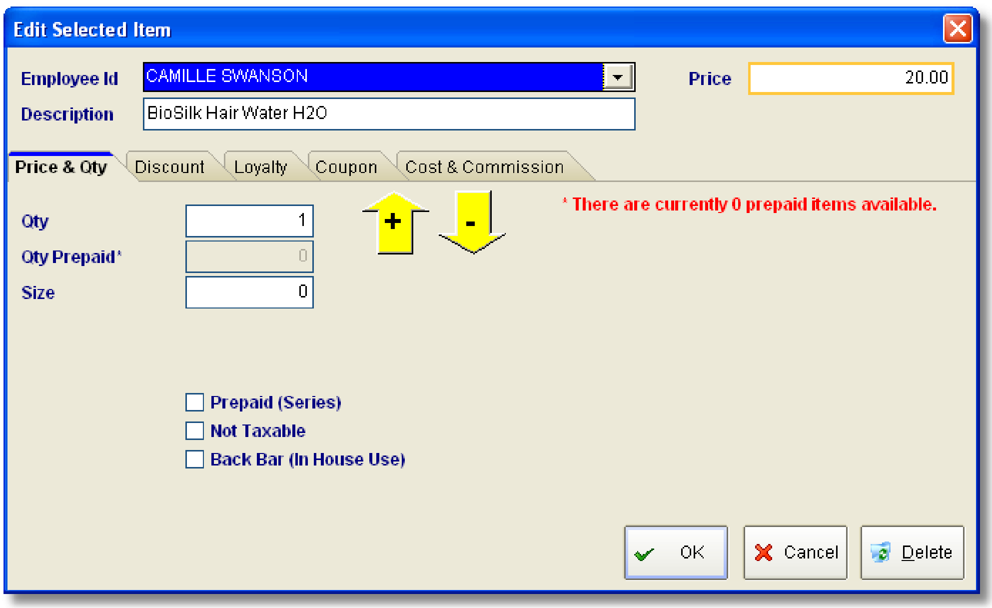
Delete Button

Click this button to delete the selected item from the invoice.

Adjust Button - Retail Item

Price and Qty Tab

The following screen will appear when the selected item type is retail:



Adjust Employee Id

You may use the drop down arrow to select a different employee for the sale of the selected item.

Adjust Price

You may edit the price of the selected item if needed. The price will be grayed out if the item that is selected is set to have no price overrides.

Adjust Quantity / Quantity Prepaid

You may use this field to adjust the quantity of the selected item you are selling. Use the yellow arrows to adjust the quantity if the client is prepaying for these items. This will automatically change the quantity in the "Quantity Prepaid" field.

Adjust Size

This field allows you to edit or enter the size of the product you are selling.

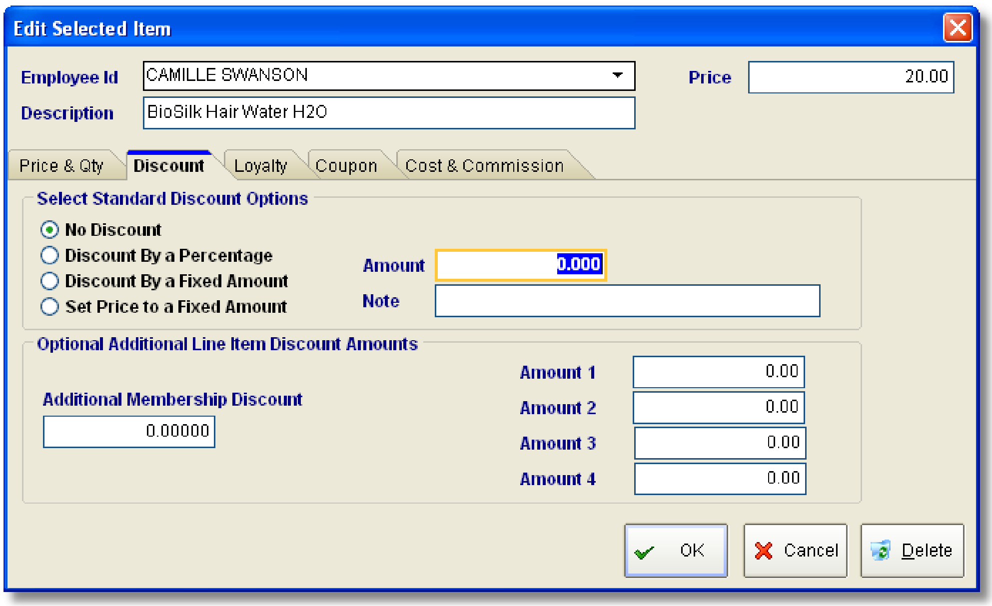
Non-Taxable Item

Check this box if the Inventory item is non-taxable. Some states charge sales tax on products but not services.

Back Bar (In House Use)

Check this box if the item selected is being used as a back bar item.

Discount Tab



Discount Type

When you select one of the 4 choices provided, you determine which of the fields to the right 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, "Set Price To".

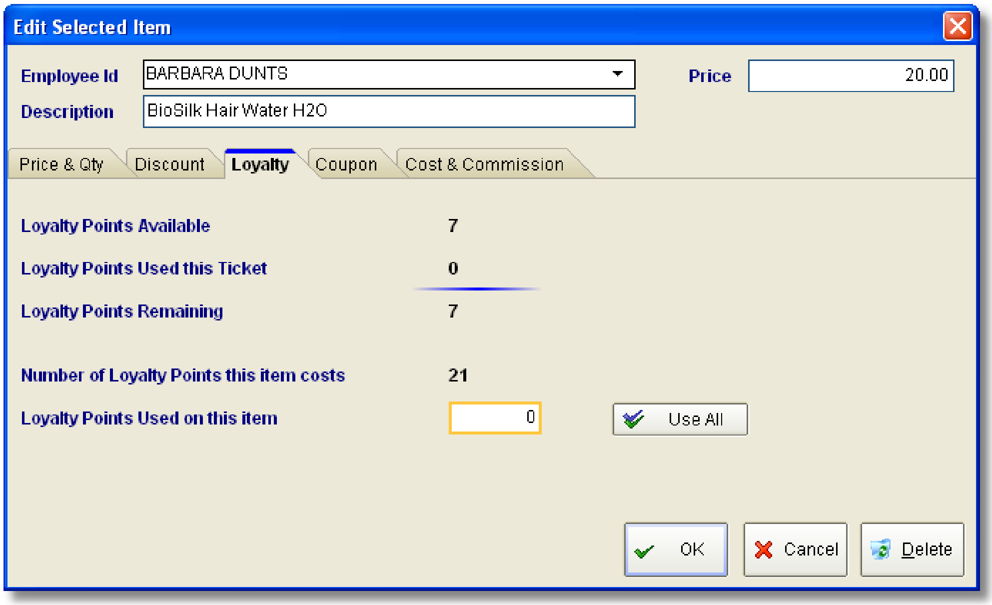
Discount Amount

Enter the amount of the discount depending on the type you selected on the left.

Discount Note

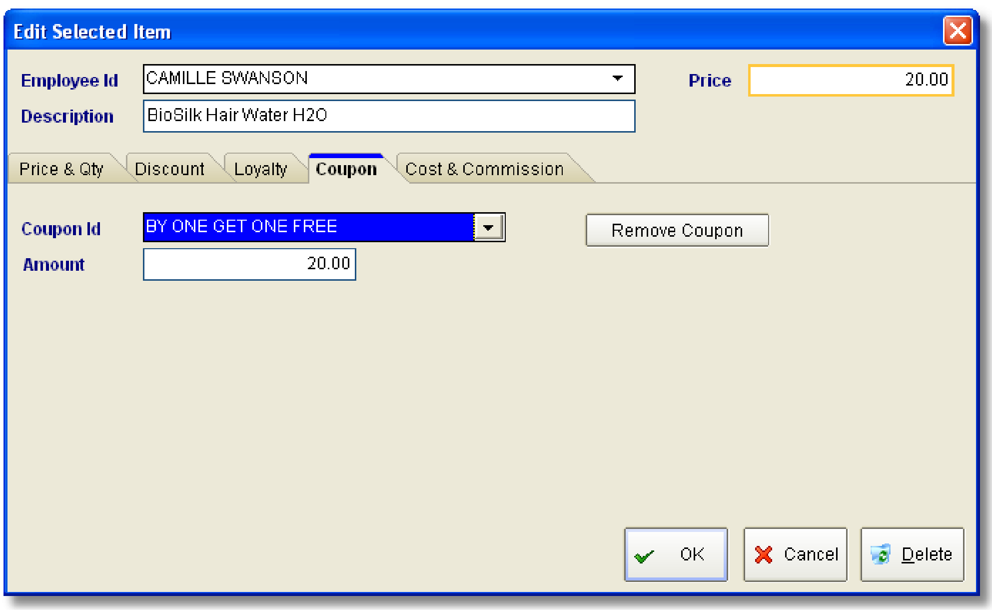
Enter a note for the discount if you need to keep information on record for the discount you are applying.

Loyalty Tab



This screen allows you to use Loyalty Points that a client may have available for the item selected.

Coupon Tab



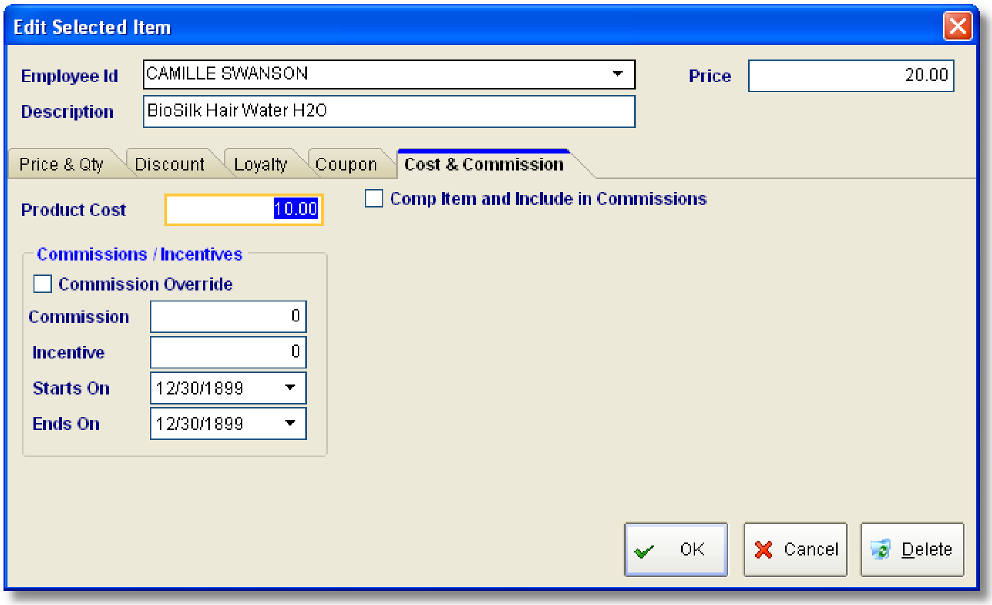
Select Coupon ID and Enter Amount

Select the Coupon that you would like to apply from the drop down list. The coupons available in this list can be created in the program's "Coupon List". This list can be reached by clicking on "Accounting" from the menu bar and selecting "Coupon List" from the drop down menu. Enter a new amount if the amount entered for the coupon is not correct for the amount you wish to apply to the selected item.

Remove Coupon Button

Click this button to remove the coupon. The amount to be discounted will no longer apply.

Cost & Commission Tab



Product Cost

This is the cost of the product that you entered on the "Pricing, Qty & Commission" tab in your Retail Product List. You may enter a new product cost if the cost has changed for this product at the time of sale. This will not change the cost of the product in the Retail Product List, however it will show up as the Cost in Reports.

Comp Item and Include In Commissions

Check this box to comp the item (sets the price to a zero dollar amount) and the employee that is associated with the item will receive full commission on the original price of the item.

Commissions / Incentives

If you wish to pay a commission to employee's 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 employee's selling this product, enter the 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.

OK / Cancel Buttons

Click the "OK" button to save your changes or the click the "Cancel" button to cancel the changes you have made.

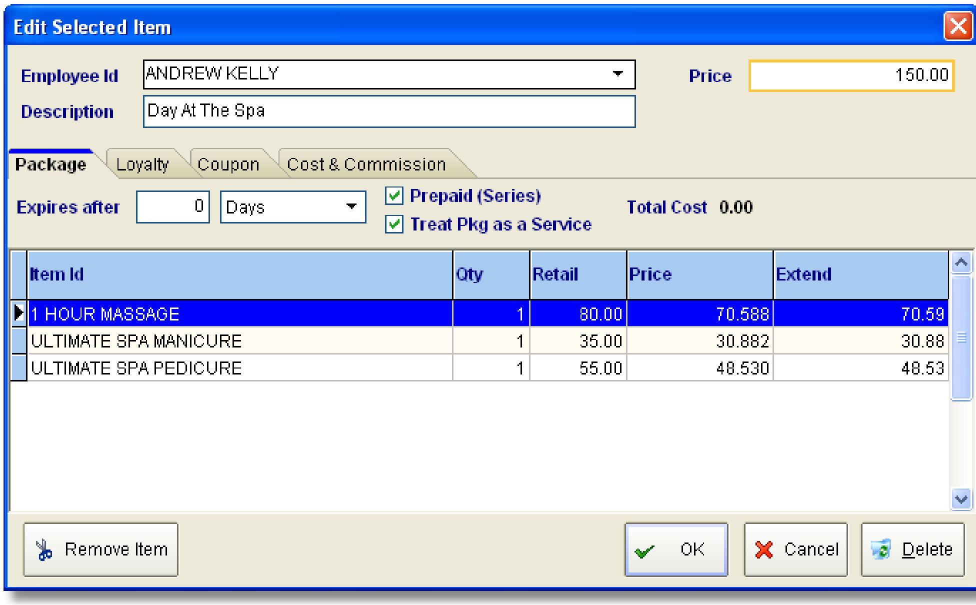
Delete Button

Click this button to delete the selected item from the invoice.

Adjust Button - Package

Price and Qty Tab

This screen will appear when you select the adjust option for a package:



Adjust Employee Id

You may use the drop down arrow to select a different employee for the sale of the selected item.

Adjust Price

You may edit the price of the selected item if needed. The price will be grayed out if the item that is selected is set to have no price overrides.

Package Expires After

Select Days, Weeks, or Months from the drop down arrow for the amount you enter in the field to left if you would like to set an expiration period for the use of the package.

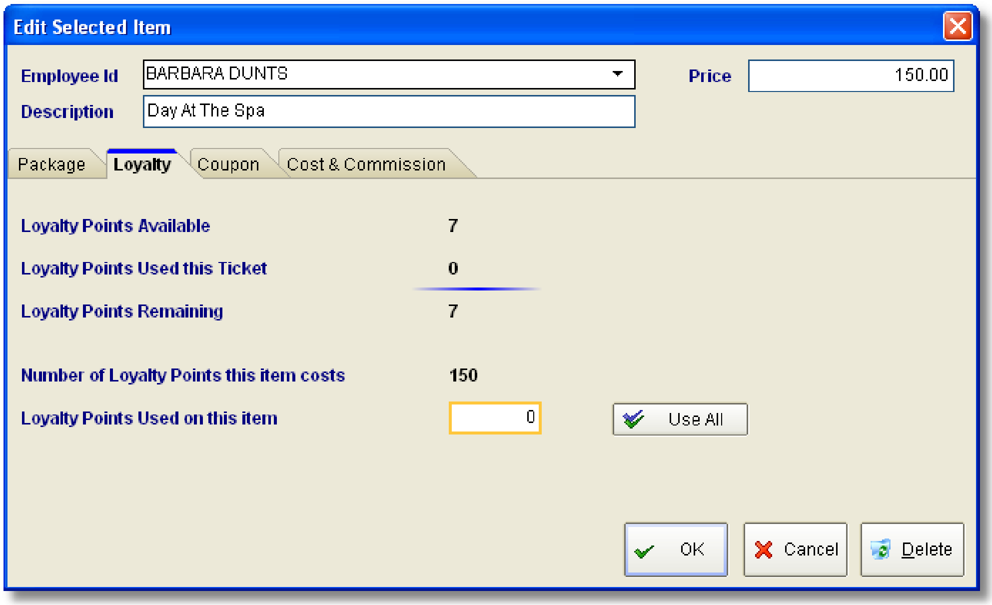
Prepaid (Series)

When this box is checked it is set in the program that this package will be used up when the client checks out at the Point Of Sale (POS) the number of times equal to the "Qty" you set on the "Package Details" screen for each item listed in the package. This also allows you to track the usage of the items the client has prepaid for. If the client will be using all the items that are listed in the package the same day they are purchasing the package, it would be best to uncheck this box.

Remove Item Button

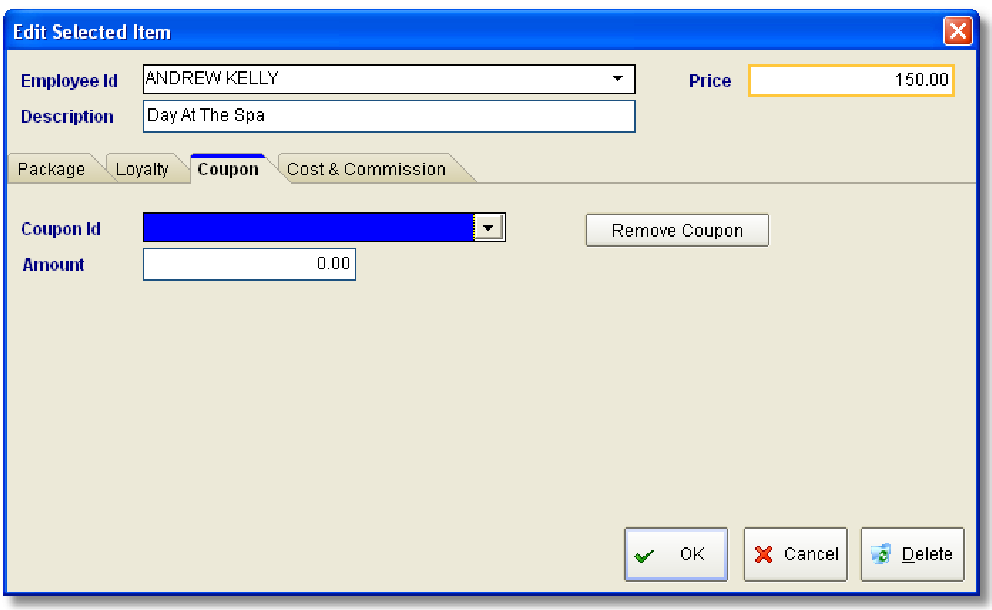
Click this button to remove the item that is highlighted in the package listing.

Loyalty Tab



This screen allows you to use Loyalty Points that a client may have available for the item selected.

Coupon Tab



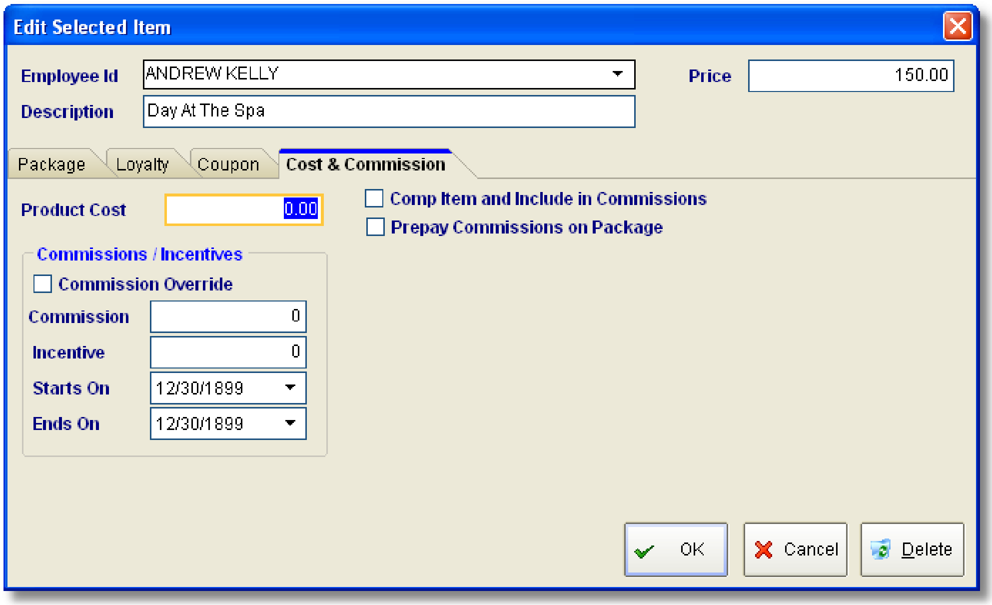
Select Coupon ID and Enter Amount

Select the Coupon that you would like to apply from the drop down list. The coupons available in this list can be created in the program's "Coupon List". This list can be reached by clicking on "Accounting" from the menu bar and selecting "Coupon List" from the drop down menu. Enter a new amount if the amount entered for the coupon is not correct for the amount you wish to apply to the selected item.

Remove Coupon Button

Click this button to remove the coupon. The amount to be discounted will no longer apply.

Cost & Commission Tab



Product Cost

This is the cost of the product that you entered on the "Pricing, Qty & Commission" tab in your Retail Product List. You may enter a new product cost if the cost has changed for this product at the time of sale. This will not change the cost of the product in the Retail Product List, however it will show up as the Cost in Reports.

Comp Item and Include In Commissions

Check this box to comp the item (sets the price to a zero dollar amount) and the employee that is associated with the item will receive full commission on the original price of the item.

Prepay Commissions on Packages

Check this option to prepay commissions when this package is sold.

Commissions / Incentives

If you wish to pay a commission to employee's 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 employee's selling this product, enter the 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.

OK / Cancel Buttons

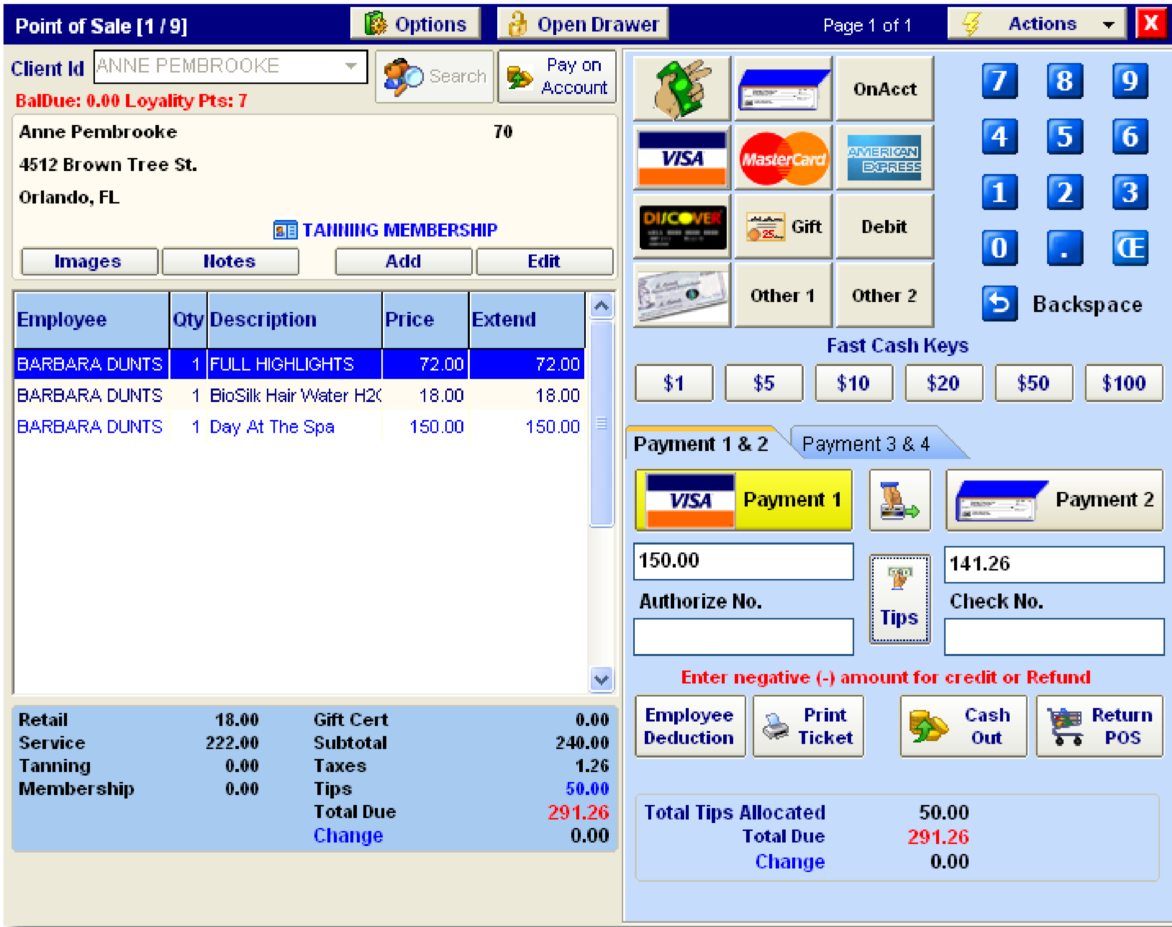
Click the "OK" button to save your changes or the click the "Cancel" button to cancel the changes you have made.

Delete Button

Click this button to delete the selected item from the invoice.

Payment

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



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, a field will be available for you to enter the Check number.

Keypad / Tips / Amount Due

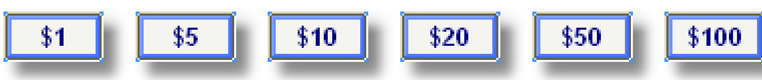
Keypad

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 is highlighted.

Tips / Amount Due Display

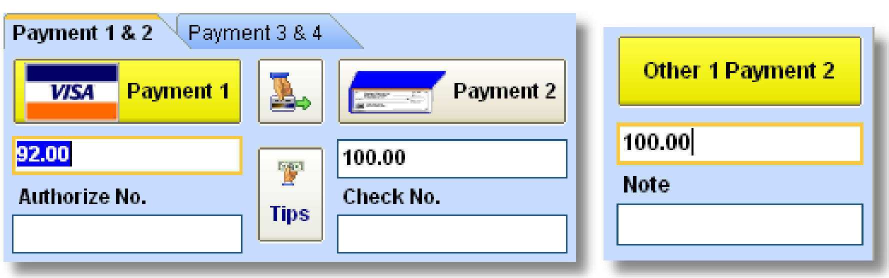
The amount due and the amount you have entered using the "Tips" button will be displayed here.

Fast Cash Keys



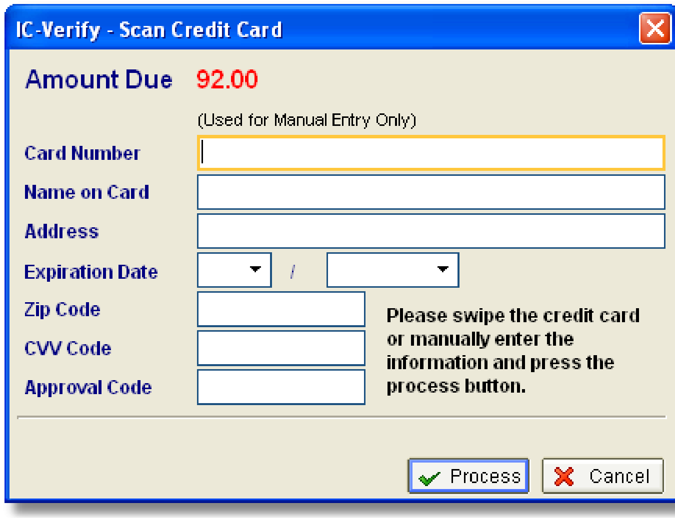
If the Client is paying cash and hands you a specific bill, just click the key matching the denomination of the bill and the sale is complete. The amount of change owed will display for 30 seconds.

Payment 1 & 2, 3 & 4



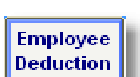
The program has the ability to split a payment between four methods. Click either Payment 1 or Payment 2 and select the first type of payment. Enter the amount that the client will be paying with the first payment type and then click the second payment button and select the second payment type. Enter 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. You may enter a small note in the note area for some payment methods. It will be stored with the transaction.

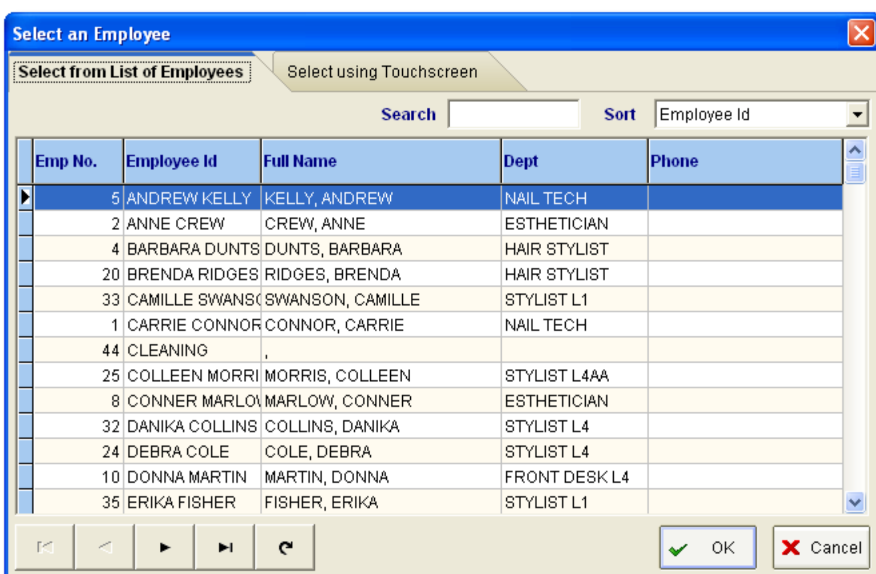
Credit Card Button



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. Envision 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.

Employee Deduction

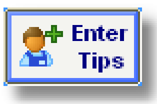


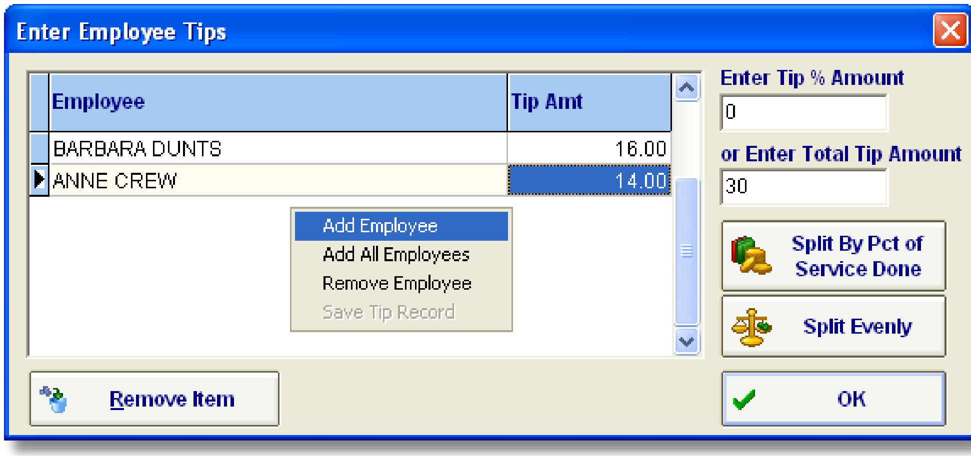


Envision has the ability to automatically apply purchases made by employees to be deducted from their payroll. When you click this button you will see the screen below. Click the employee making the purchase and then click the "OK" button. Use the scroll bar on the right to scroll through the list if 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 Button

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





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".

1. 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 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. 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.

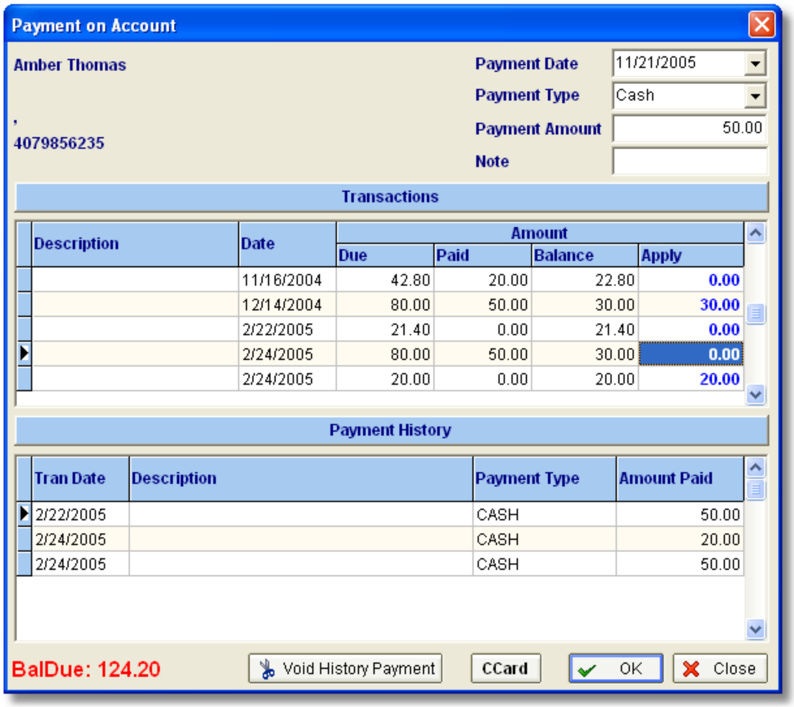
Cash Out Button

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 POS

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.

Pay On Account



This screen appears when you click the "Pay On Account" button located on the POS screen. It allows you to take a payment on a clients account. Click the various fields in the screen shot below for how to use that field.

Client Information

This area (displayed to the left of the Payment Date, Payment Type, Payment Amount, and Note) of the screen shows which client you have selected to receive a payment from. You must select a client before you can view this screen.

Payment Information

These four fields allow you to enter the information about this payment.

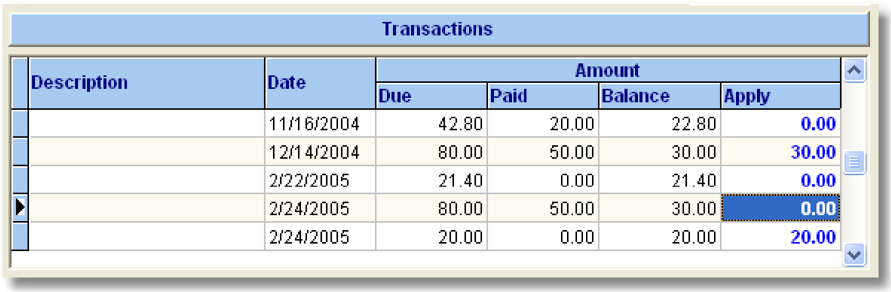
Payment Date: Today's date is automatically filled in for you, however you may change this if needed.

Payment Type: Click the small button and select from the list of Payment Types.

Payment Amount: Enter the Payment Amount you are receiving against the account. Don't forget to move to the "Apply" field in the "Amount" section below and enter how much of this payment is to be applied to each ticket. We show only one ticket listed but there may be many if you regularly allow customers to maintain accounts.

Note: You may enter any text you wish in this field.

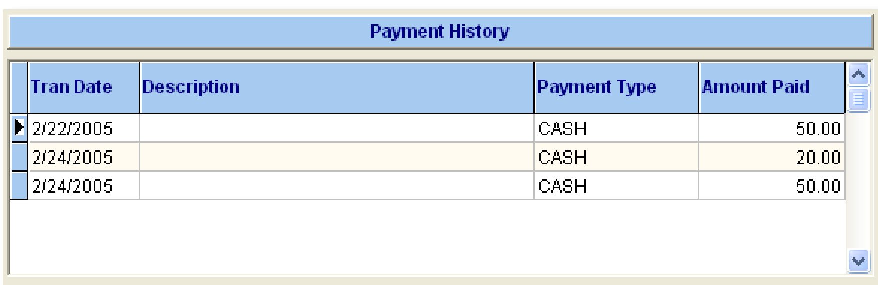
Transactions



Description	Date	Amount: Due	Paid	Balance	Apply
	11/16/2004	42.80	20.00	22.80	0.00
	12/14/2004	80.00	50.00	30.00	30.00
	2/22/2005	21.40	0.00	21.40	0.00
	2/24/2005	80.00	50.00	30.00	0.00
	2/24/2005	20.00	0.00	20.00	20.00

This listing shows all the invoices the client owes. If there is more than one, you must enter the part of the payment (the amount you entered into "Payment Amount" above) to apply to each ticket in the "Apply" field. you must select which tickets to pay by entering values into the "Apply" field. If you receive payments by mail, you would use this screen to enter the payments into the system. If the client doesn't specify the breakdown of the "Payment Amount" among the tickets, pay the oldest tickets first. On this sample screen, there are three tickets and we have entered the total "Payment Amount" into the "Apply" field for the oldest ticket.

Payment History



Tran Date	Description	Payment Type	Amount Paid
2/22/2005		CASH	50.00
2/24/2005		CASH	20.00
2/24/2005		CASH	50.00

This is a listing of the payments that have been applied to the transactions that were placed "On Account".

Void History Payment Button

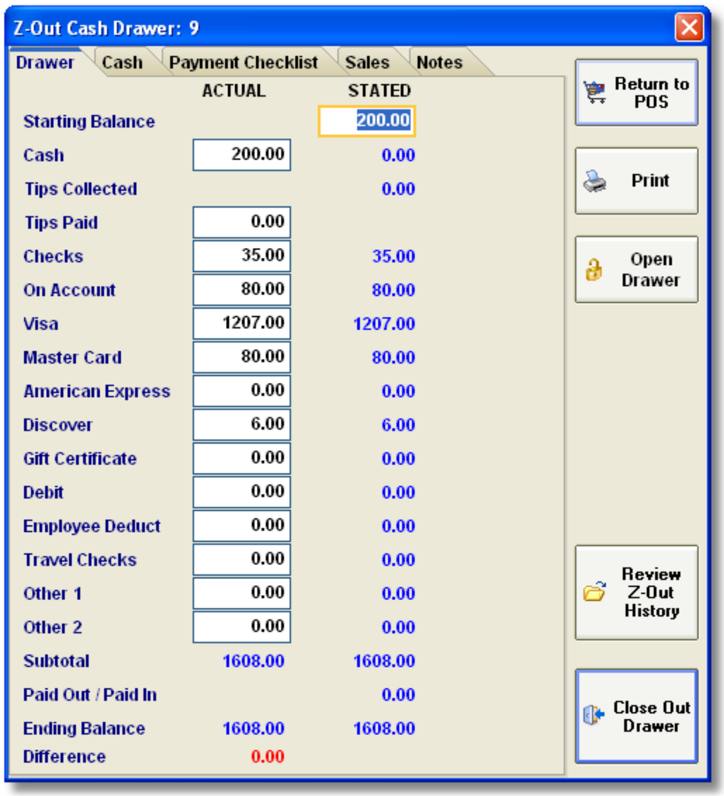
Click this button to void the payment history that is selected (must be highlighted).

CC Card Button

Click this button to process the credit card payment.

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 on the following page, 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.



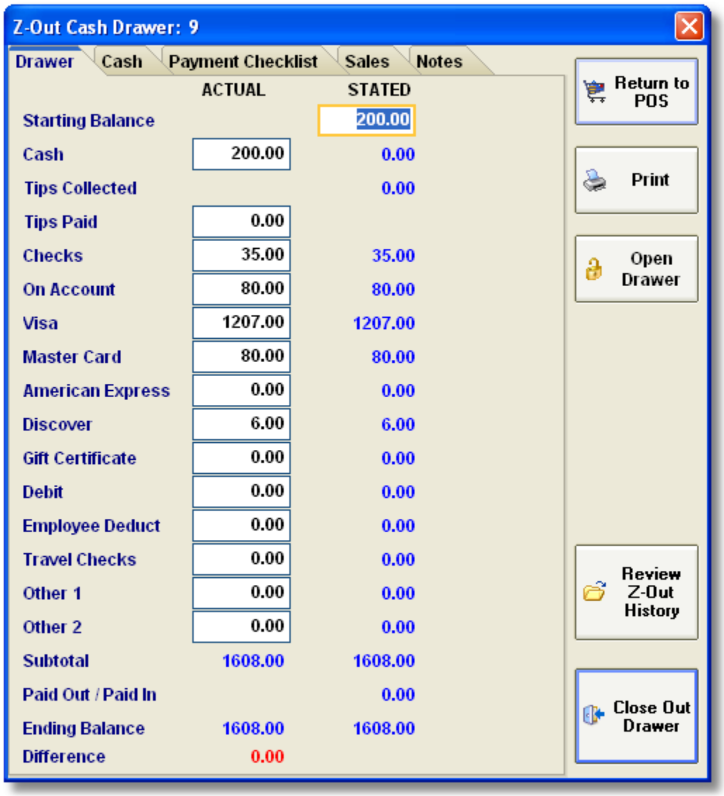
Actual Column and Fields

The Actual fields to the right of the payment types are the fields that you will use to enter the amounts that you have counted from the cash in your drawer and any receipts or reports that you are using. If these fields do not match what is displayed in the "Stated" column, there may be a credit card statement or receipt missing, or a sale may not have been entered through the Point of Sale. Use the information on these screens along with your Point of Sale reports to determine why there is an amount other than "0.00" displayed as the difference.

Stated Column

The "Stated" column displays the amounts saved in the program for all of the transactions ran through the Point of Sale for the current drawer. Compare this information to the actual amounts you have counted.

Drawer Tab



Starting Balance

The amount inserted automatically is based upon the amount you entered as a default setting in your "Program Preferences". 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 when you start your Z-Out. If you would like to change the default setting, this can be done by selecting "Setup Program Preferences" from the "Company" menu.

Payment Type Totals

The fields "Cash" down 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 they want 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.

Subtotal

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

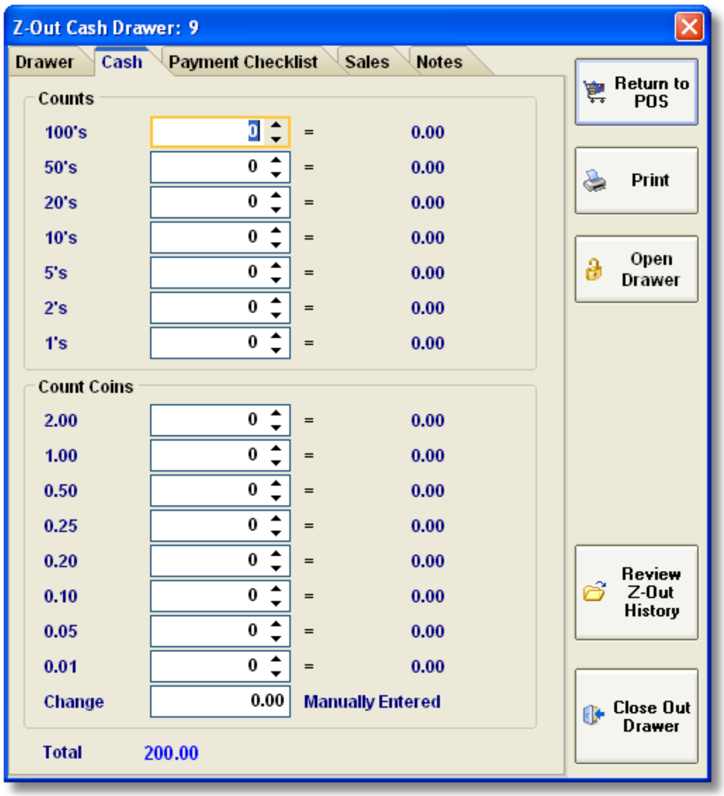
Paid Out / Paid In

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. Normally this number would take the form of the Receipts the Vendors gave in return for the payment.

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).

Cash Tab

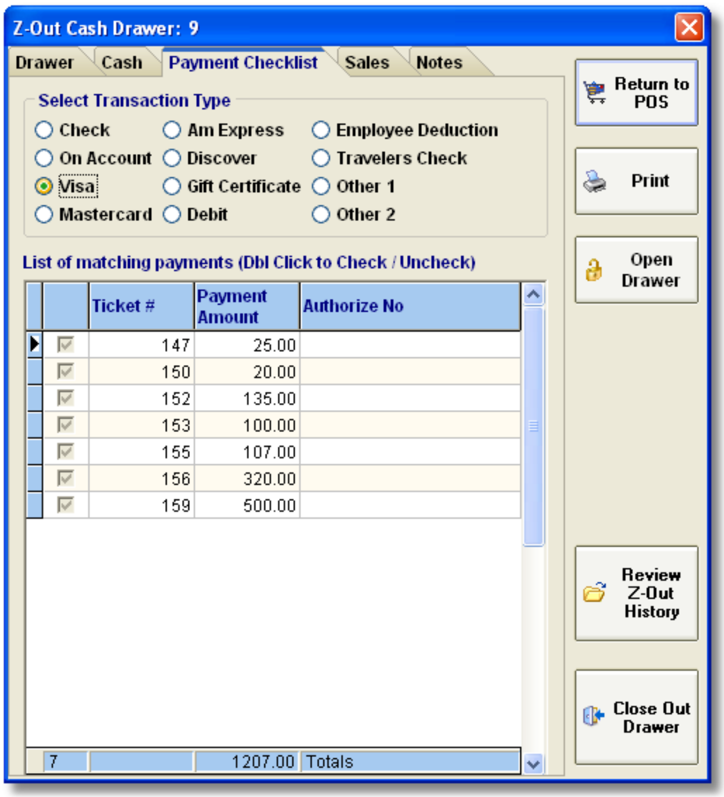


Cash / Coin Counter

This screen helps you to 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.

Payment Checklist

This screen will allow you to check all of your receipts and ticket history 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 and ticket history match what the program has recorded.



Transaction Type

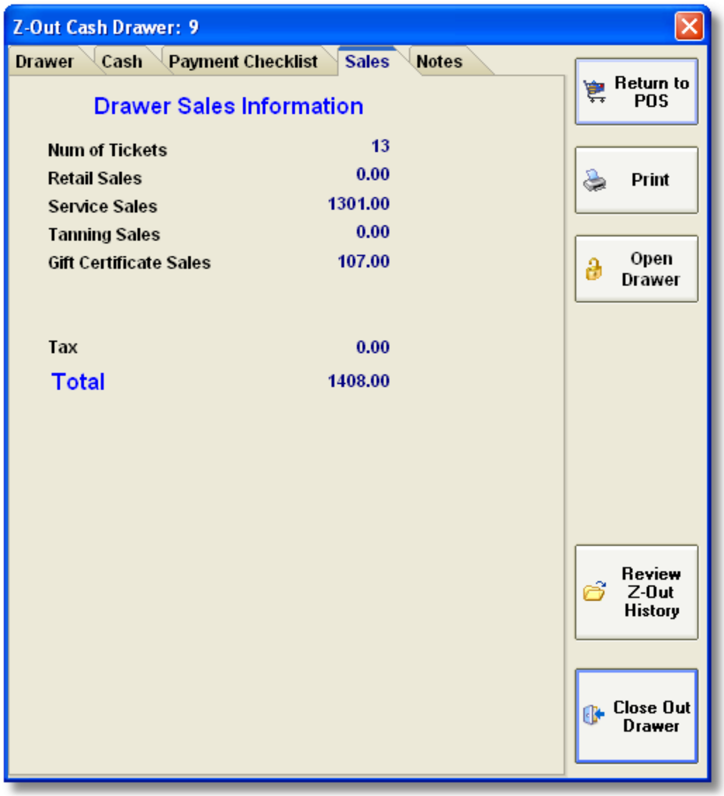
Select the type of payment to populate a list of transactions that used the selected payment type.

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 next to the Visa payment type.

Sales Tab

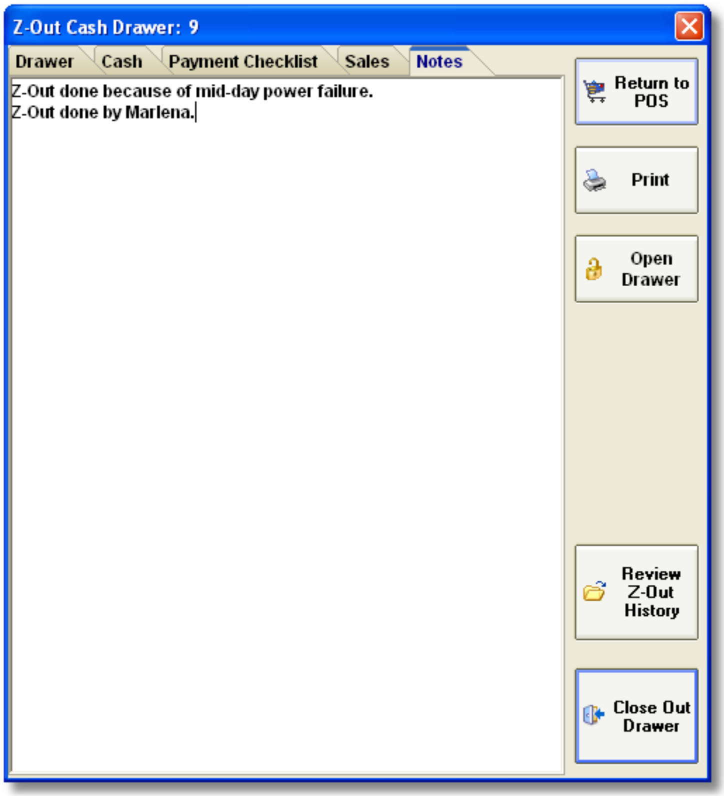
This screen is for display only. It shows all the categories of sales with the amount of each that was sold. This is an accurate accounting of the strength of your business activity for the day.



Sales breakdown

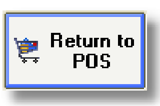
This screen is for display only. It shows the breakdown into the different types of sales you have entered during the day on the Point Of Sale (POS) screen. This information is very valuable for planning and measuring your business decisions. For example, did last weekends newspaper advertisement for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

Notes Tab

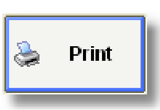


Use this screen to record any information pertaining to the Z-Out of the drawer. Such as who performed the counting, whether it was end of day or an unusual event triggered the count. When done click the "Print" button to print this information, and then the "Z-Out" button to save and reset the information to zero for another day's business.

Z-Out Buttons



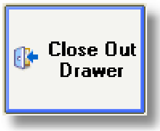
Click the "Return to POS" button to close the Cash Drawer and discard all changes you have made. This cancels any entries you have made and closes the "Z-Out" screen.



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

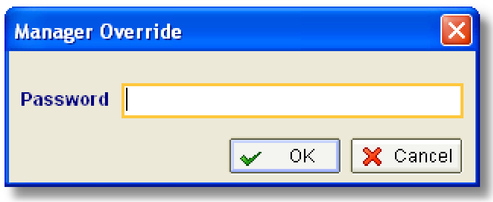
Click "Open Drawer" button to open the cash drawer if it is connected to your computer and configured correctly in the Station Configuration of Envision.

Click the "Review Z-Out History" button to display information for a previous Z-Out.



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.

Manager Override Password

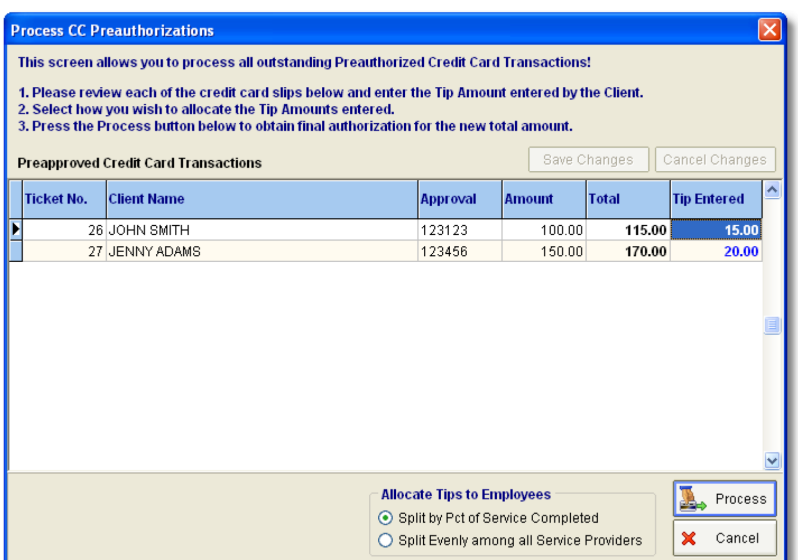


It is required that you enter a Manager Override password for some actions taken in the Point of Sale. As the password is entered it will be shown as asterisks to prevent anyone from viewing it.

Credit Card Preauthorization

The Credit Card Preauthorization feature allows you to process all outstanding Preauthorized Credit Card transactions for tips. Use the screen below to process the tips when you are ready. This screen is only available in the program if you have purchased the Credit Card Processing module and you have an account setup with X-Charge.

This screen can be reached by clicking on "Accounting" on the Menu Bar and selecting "Credit Card Preauthorization" from the drop down menu.



1. Review each of the credit card slips for each of the transactions listed on this screen and enter the

Tip Amount entered by the client in the "Tip Entered" field.

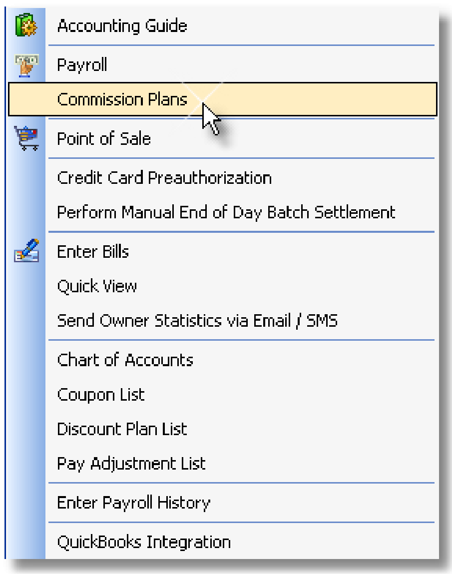
2. Select how you wish to allocate the Tip Amounts Entered. You have the option of splitting the tip by the percent of service completed, or you can split the tip evenly among all service providers.

3. Press the "Process" button to obtain final authorization for the new total amount.

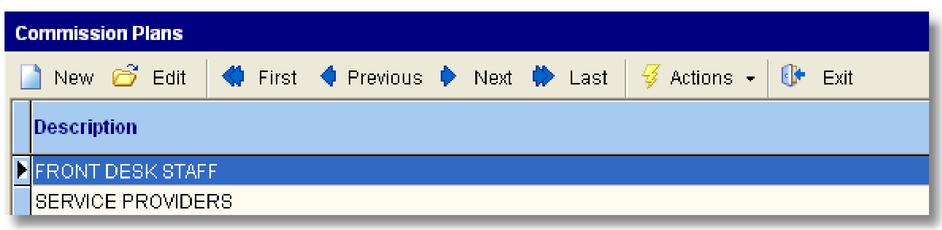
Accounting

Commission Plans

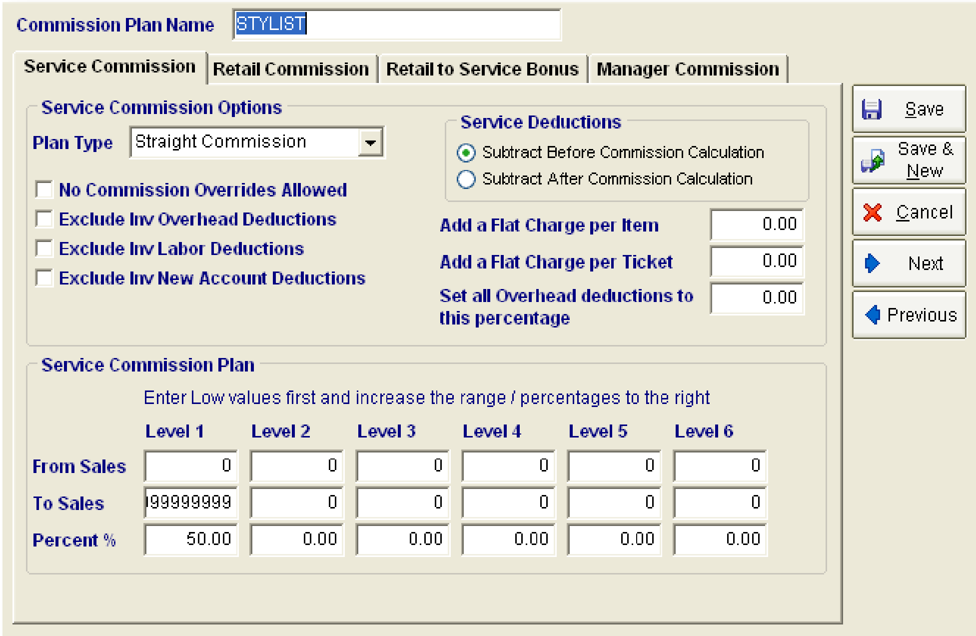
To enter the Commission Plan list, click on "Accounting" from the menu bar and select "Commission Plans" as shown in the image below.



The following list will appear:



Service Commission Tab



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 in the setup.

Plan Type

There are two choices and they both use the Levels that you setup below. How they use these levels is explained below:

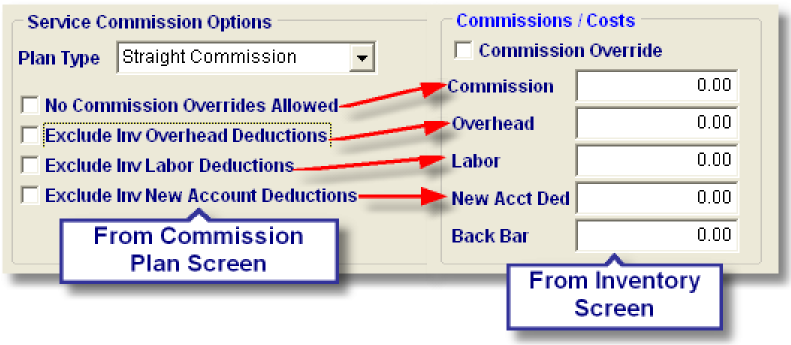
Straight Commission: This method takes the total sales for this employee (Retail or Service only, depending upon which screen your are setting up) and locates the amount on one of the 6 Levels below. The Percent for that Level is then multiplied by the total sales amount. For example: Using the numbers shown on this sample screen, if an employee had $2,345 in sales it would place them at the range described by Level 4 and the program would multiply $2,345 by .16 to solve for the commission.

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. Using the numbers above: The %2,345 would be spread across the levels this way. There would be no commission paid on the first $500, the second $500 would earn 10%, the next $500 would earn 12%, the next $500 would earn 14% and the last $345 would earn 16%.

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.

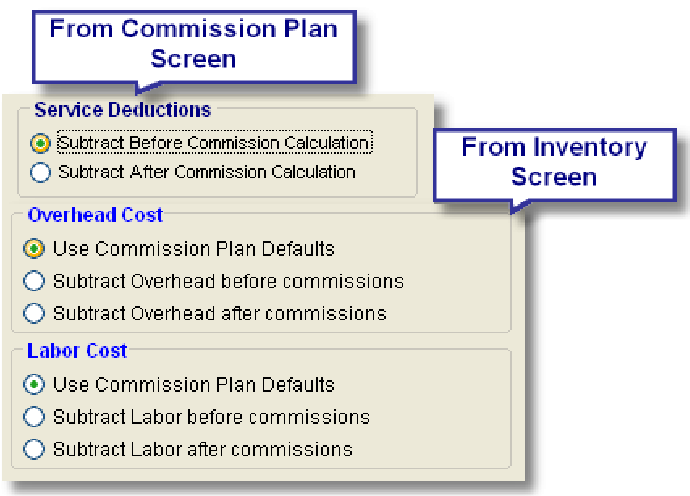
Service Plan Overrides

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 this 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 option buttons, 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.

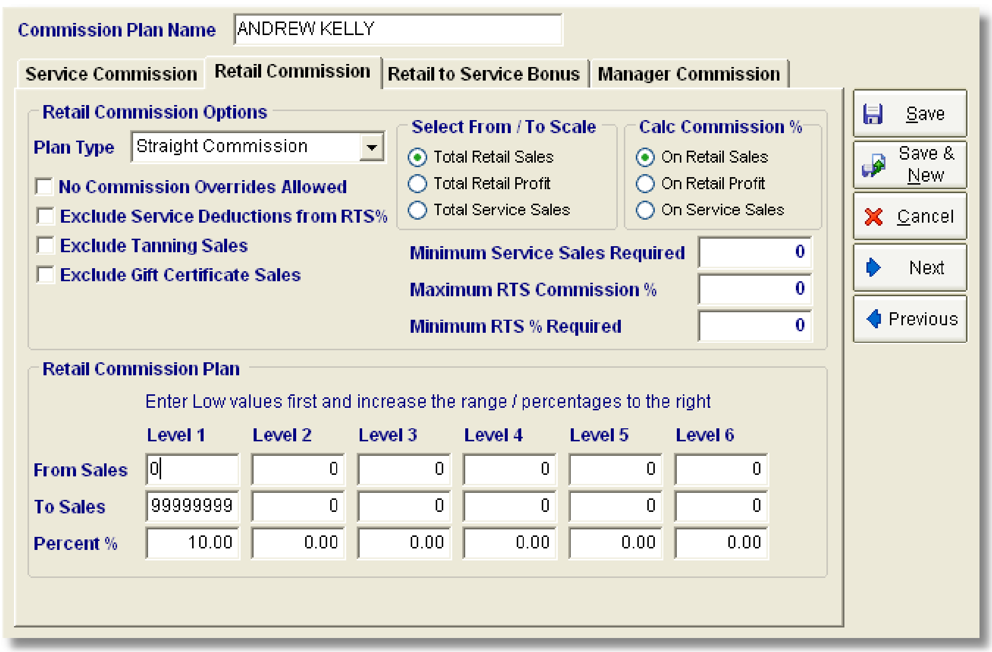
Commission Plan Levels

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 Commission 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.



Plan Type

There are two choices and they both use the Levels that you setup. 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. For example: Using the numbers shown on this sample screen, if an employee had $2,345 in sales it would place them at the range described by Level 4 and the program would multiply $2,345 by .16 to solve for the commission.

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. Using the numbers above: The %2,345 would be spread across the levels this way. There would be no commission paid on the first $500, the second $500 would earn 10%, the next $500 would earn 12%, the next $500 would earn 14% and the last $345 would earn 16%.

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 that you do not want to pay commission on.

No Commission Overrides Allowed

Check this box so that anything that 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 plan. This will effectively increase the amount paid on commission.

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 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

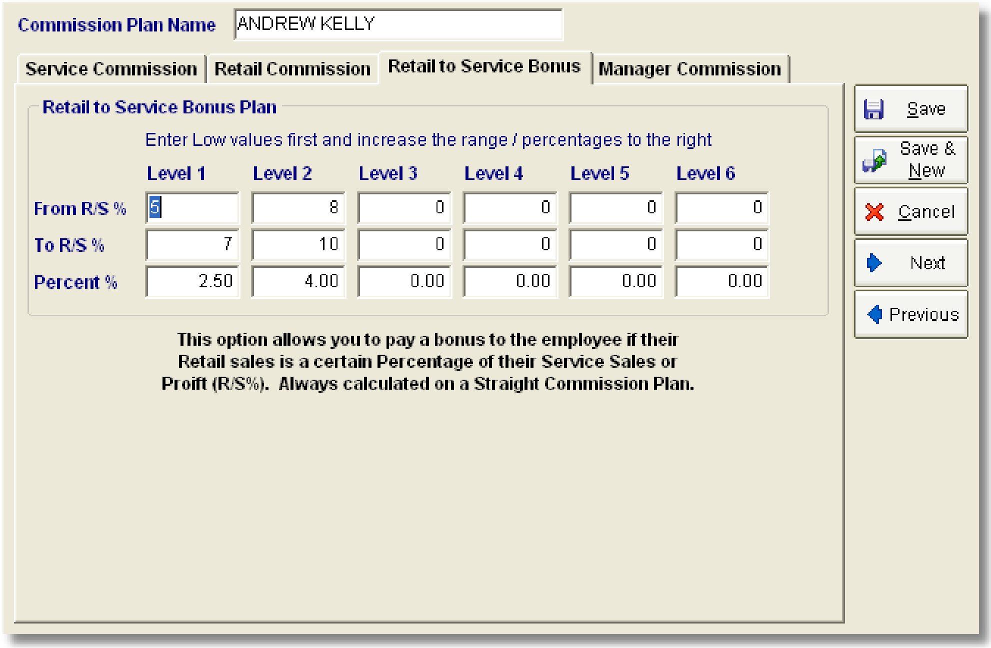
Enter a Minimum Retail to Sales % if required.

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



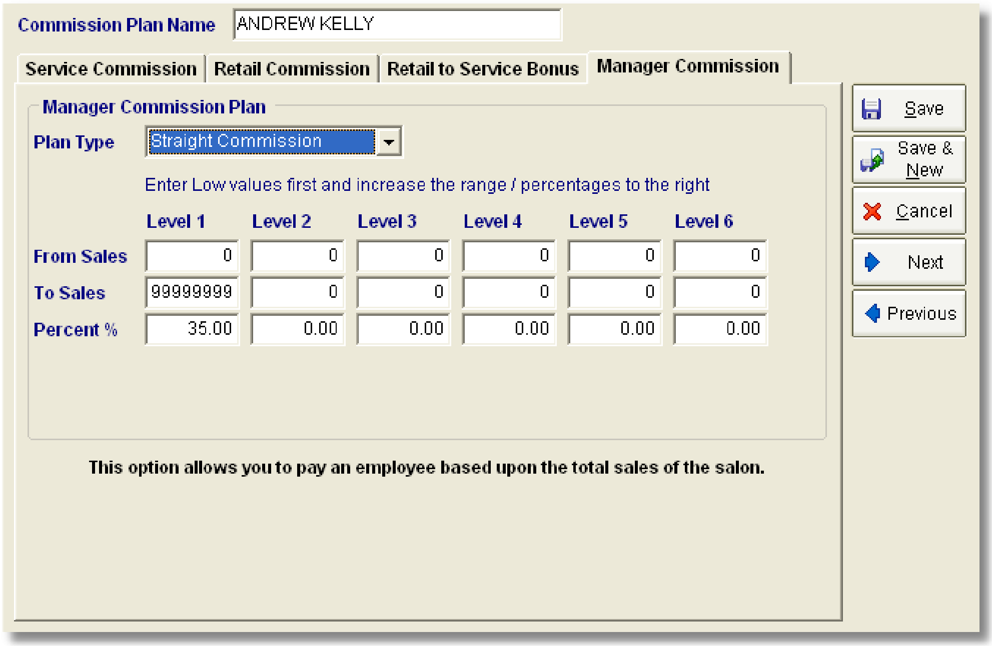
Shown above is the Retail to Service Bonus Commission plan screen. The purpose of this screen is to provide a bonus to Service employees (Hair Stylists, Manicurists, etc.) who sell large amounts of Retail products. The values you enter here will be used to calculate a Bonus, which is in ADDITION to the 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.



Plan Type

There are two choices and they both use the Levels that you setup. 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.

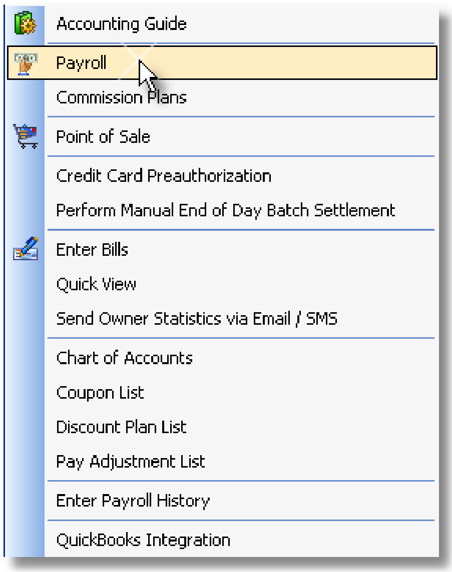
Commission Plan Levels

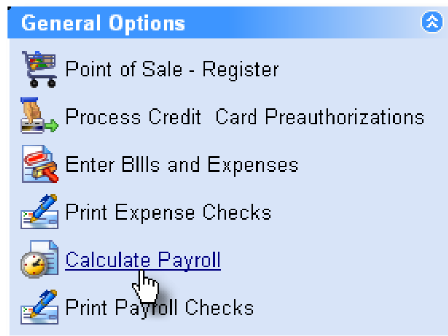
There are 6 levels provided. As shown in the sample screen shot, you would use these levels to pay an increasing percentage commission to an employee, determined by the amount of sales. How the program uses this table is determined by the "Plan Type" you selected above.

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

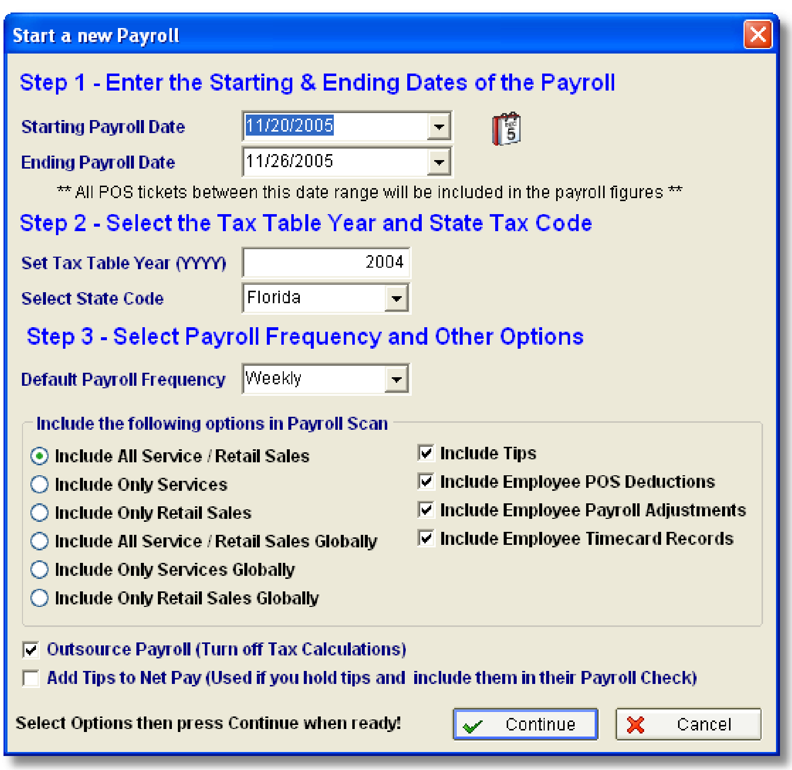
The Payroll screen can be reached by clicking on "Accounting" from the menu bar and selecting "Payroll" as shown in the image below. The Payroll listing can also be reached by clicking on "Calculate Payroll" under "General Options" on the Accounting Guide window.





Start a New Payroll

Click the "Start a New Payroll" button to open the following screen:



Payroll Dates

Set the range of dates for this payroll period. The date fields will display dates from the last time you did the payroll to the current date. Use the drop down calendars to do this quickly. The Default Payroll Frequency box allows you to set Weekly, Monthly, etc.

Set Tax Year

Select the tax year for which you wish to view summary information. The default is the current year.

Select State Code

Select from the drop down list, the state your business is located or the state that is applicable to these employees.

Payroll Frequency

The Default Payroll Frequency box allows you to set Weekly, Bi Weekly, etc.

Included Options in Payroll Scan

These options allow you to select what items to include when scanning a payroll. These options can be helpful when you wish to create a payroll that includes only service or only retail sales on a specific payroll.

Outsource Payroll

Click here if you outsource your payroll (for example ADT). If you check here, the program will provide information on a report you can send to the outsource company.

Add Tips to Net Pay

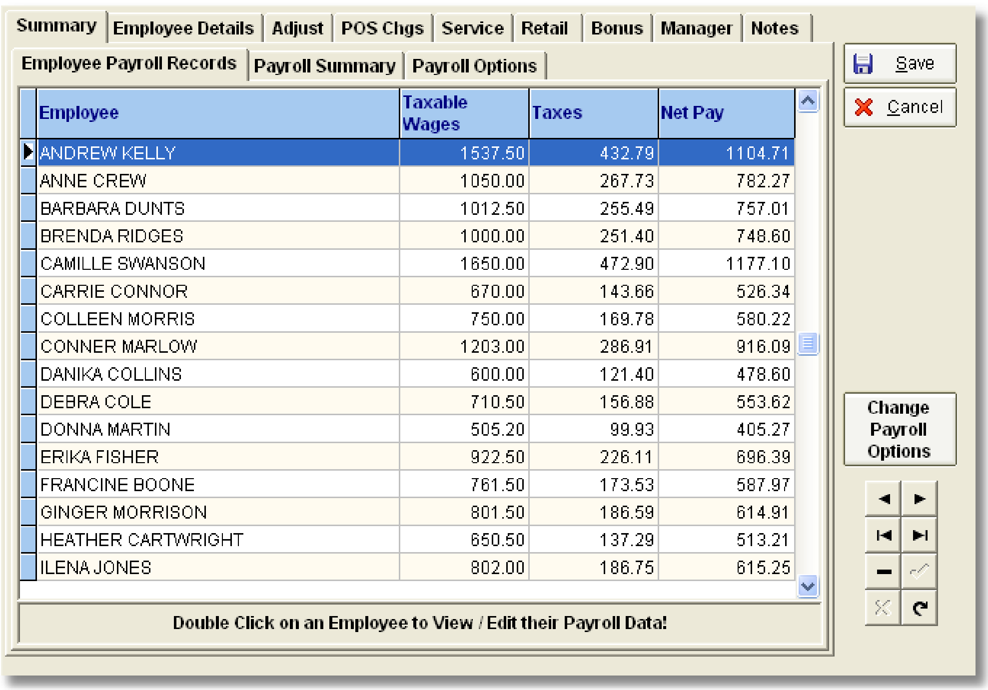
Check this box if you would like the tips that were entered in the POS (Point of Sale) window to be added to the payroll.

Click the "Continue" button after making your selections when you are ready to run the payroll scan.

Summary

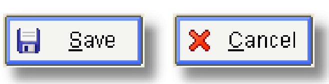
Employee Payroll Records

The Employee Payroll Records screen is displayed after clicking the "Continue" button from the "Start a New Payroll" button. This is the listing of all employees for this pay period. To get detailed information about an employee, double left click on that employee's name. Or, highlight the name and click the "Employee Details" tab.



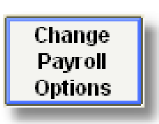
This area of the screen will show you a listing of the employees' Taxable Wages, Taxes and Net Pay.

Save or Cancel Buttons



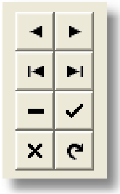
Click the Save to keep the information you entered on this screen, or click the Cancel to discard your changes and return to the list screen.

Change Payroll Options Button



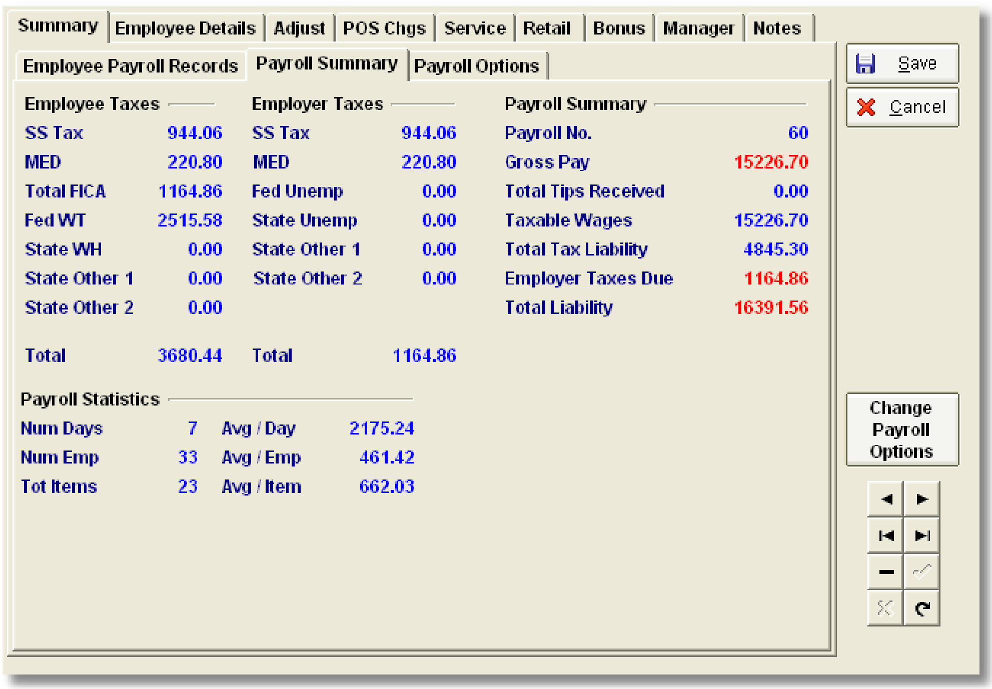
Click this button to jump to the Payroll Options screen. You may then change your options and click the "Select Options Then Click Here To Scan Payroll Data" button to recalculate and update the information in the selected payroll.

Employee Payroll Selection Buttons



If you rest your mouse arrow on top of each button a popup will explain what each button is for.

Payroll Summary



- ## Employee Taxes

This area of the screen displays the tax totals for this pay period paid by all employees.

- ## Employer Taxes

This area of the screen displays the taxes for this payroll period paid by the Employer for all employees.

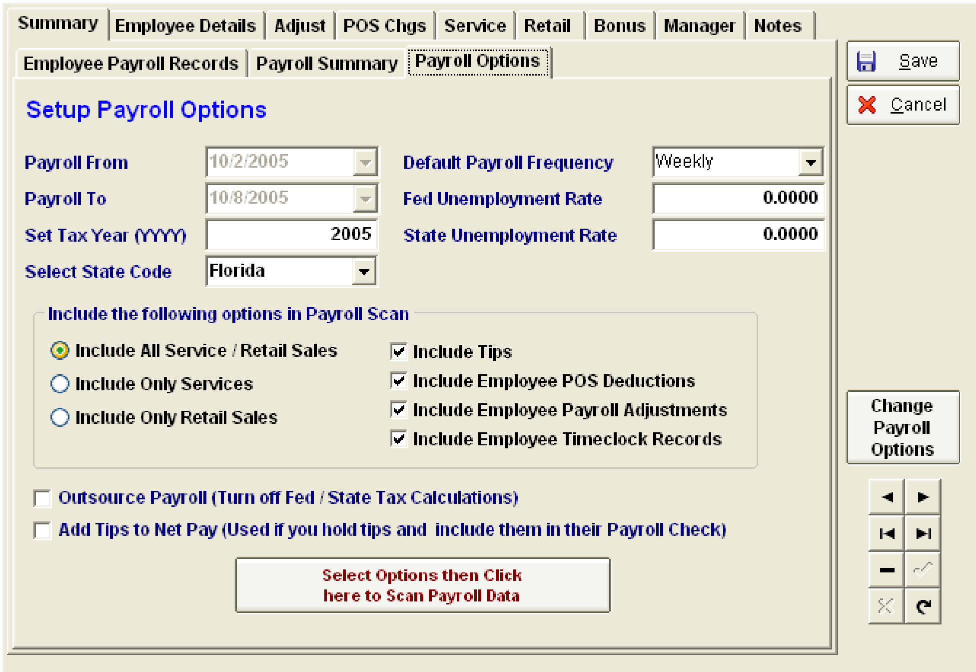
- ## Payroll Summary Items

This information is a summary of the Payroll number (Payroll #) you have selected from the listing. The number of days, employees, and service items are shown. Also the Total Gross Pay for all employees is shown along with the averages for this pay period.

- ## Payroll Statistics

This area of the screen displays information about this payroll period for all employees.

Payroll Options



Payroll Dates

Set the range of dates for this payroll period. The date fields will display dates from the last time you did the payroll to the current date. Use the drop down calendars to do this quickly. The Default Payroll Frequency box allows you to set Weekly, Monthly, etc.

Set Tax Year

Select the tax year for which you wish to view summary information. The default is the current year.

Select State Code

Select from the drop down list, the state your business is located or the state that is applicable to these employees.

Payroll Frequency

The Default Payroll Frequency box allows you to set Weekly, Bi Weekly, etc.

Unemployment Rates

Enter as a decimal the Federal and State unemployment rates. For example for 1/4 % you would enter .0025.

Include In Payroll Options

These options allow you to select what items to include when scanning a payroll. These options can be helpful when you wish to create a payroll that includes only service or retail sales on a specific payroll.

Payroll Outsource

Check this box if you outsource your payroll (for example ADT). If you check here, the program will provide information on a report you can send to the outsource company.

Add Tips to Net Pay

Check this box if you would like the tips that were entered in the POS (Point of Sale) window to be added to the payroll.

Scan Payroll Data

Click this button to update the payroll data. Since you will likely have created this payroll period before the end of the period, you can click here to refresh the data with the latest information from the Point Of Sale.

Employee Details

This screen shows the details for a single employee for this pay period.

The left side of the screen is a summary of the payroll period earnings, and charges for this employee.

Hours: 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.

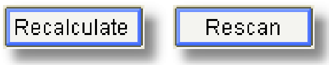
- Rental Chg: If this employee rents space and/or equipment from you, the total amount of the Daily fees you charge are shown here.

= Net Paid: This is the total of all items above this item. Only "Tips" are not in this figure.

Employee Payroll Detail Screens

These screens will contain the details that make up the totals on the left side of the screen. You may 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 Buttons

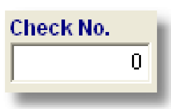


Click the "Recalculate" button to recalculate the amounts and totals in the payroll if you have entered a new amount into any of the fields. Click the "Rescan" button to rescan the payroll without including any amounts you may have entered or changed in the fields to the left.

Print Summary Button

Click this button to print a summary sheet of the selected employee's payroll information.

Payroll Check Number

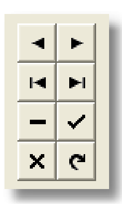


Enter the check number for the selected employee's check into this field.

Print Payroll Check Button

Click this button to print the selected employee's payroll check.

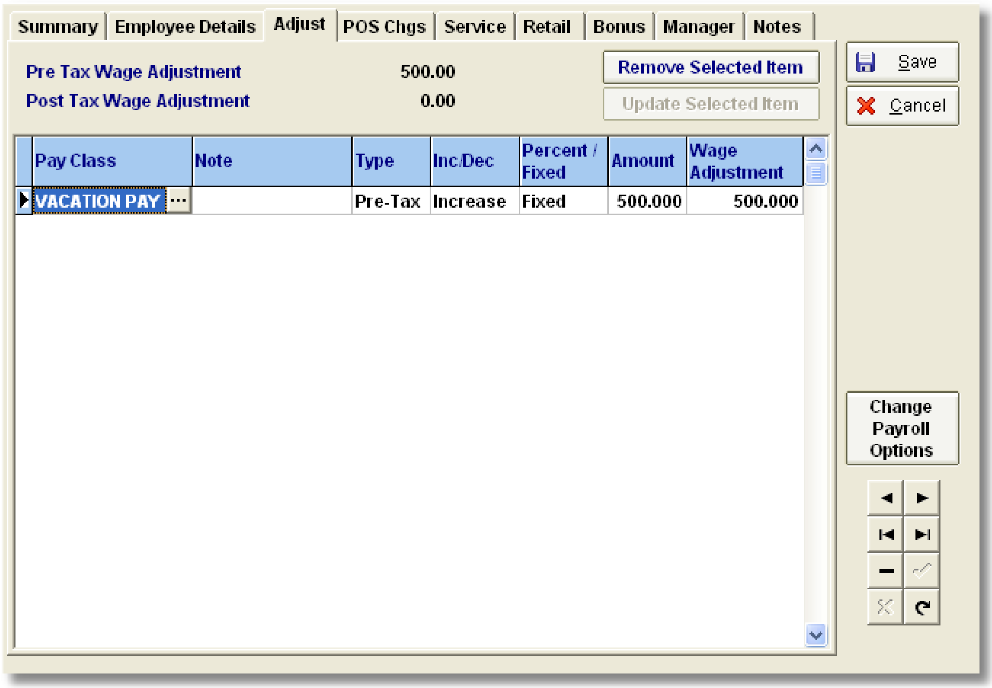
Employee Payroll Selection Buttons



If you rest your mouse arrow on top of each button a popup will explain what each button is for.

Adjustments

Payroll Adjustments are any type of additional pay or deduction that needs to be included in the payroll for your employees. The "Adjust" tab allows you to add, edit, or remove a payroll adjustment for the selected employee.



Payroll Adjustment Buttons

Remove Selected Item: Click this button to remove a Payroll Adjustment from the list.

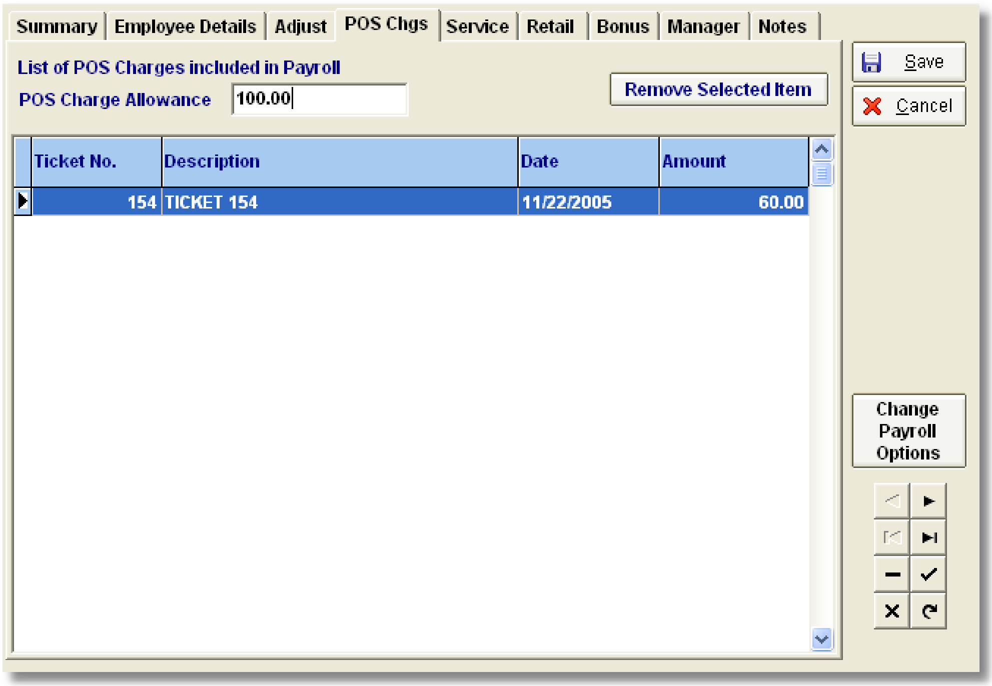
Update Selected Item: Click this button to update the Payroll Adjustment list if you have just added an adjustment.

Payroll Adjustment List

This is a list of Payroll Adjustments for the selected employee. You may add or remove items from this list. Click the small button under the employee column to select a new payroll adjustment or right click in this field to add a new line for selecting an additional payroll adjustment.

POS Chgs

This screen shows any charges an employee made at the Point Of Sale. These charges are deducted after taxes have been calculated.



POS Charge Allowance

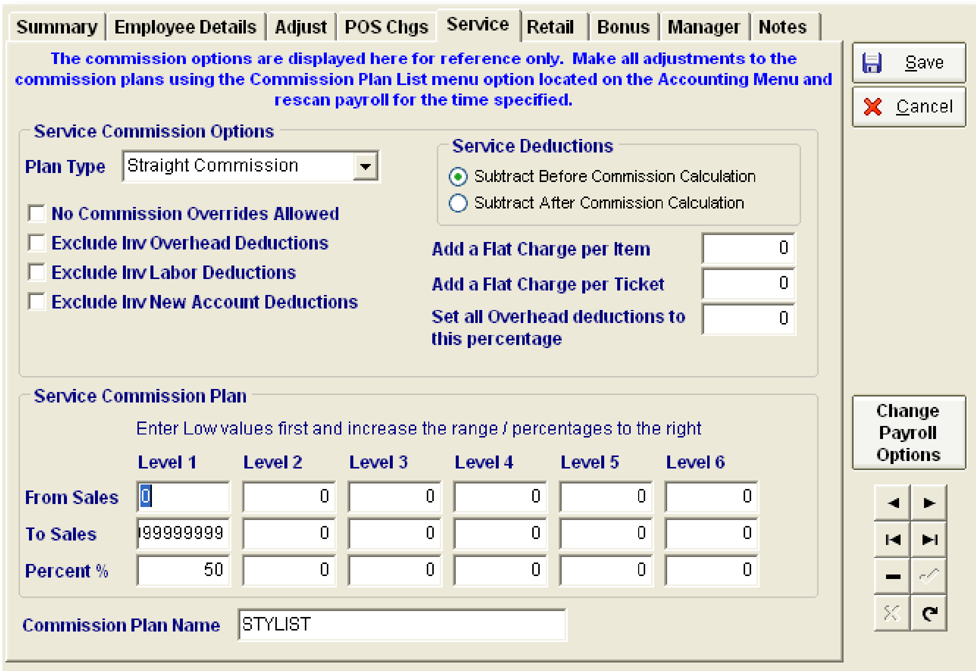
Enter an amount into this field that the employee is allowed to charge without a payroll deduction.

POS Payroll Charges Listing

This area of the screen lists the details for all charges this employee made at the Point Of Sale. In case of disputes, the Ticket Number, Description, Date and Amount of the deduction are shown.

Service Commission Plan Details

Commission plans are made up of four parts, Service, Retail, Retail to Service Bonus and Manager Commission. The plan is setup using the "Commission Plan" choice from the "Accounting" menu. When you assigned a commission plan to an employee, all the settings for that plan are applied. Using this payroll screen, you may the change the "Service" items for this employee, during this pay period only. If you wish to make the change permanent, you must change the plan using the "Commission Plan" choice from the accounting menu.



Plan Type

There are two choices and they both use the Levels that you setup below. How they use these levels is explained below:

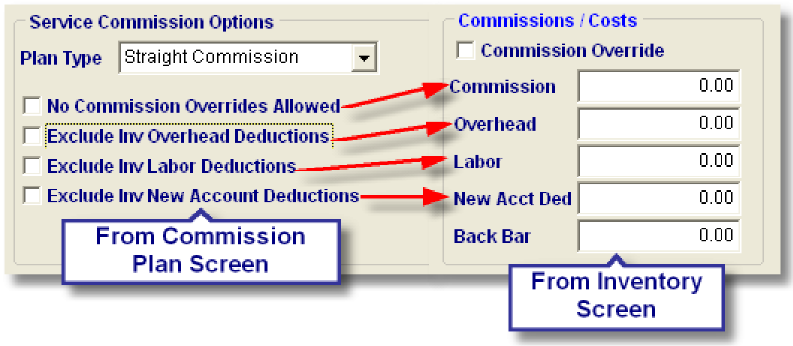
Straight Commission: This method takes the total sales for this employee (Retail or Service only, depending upon which screen your are setting up) and locates the amount on one of the 6 Levels below. The Percent for that Level is then multiplied by the total sales amount. For example: Using the numbers shown on this sample screen, if an employee had $2,345 in sales it would place them at the range described by Level 4 and the program would multiply $2,345 by .16 to solve for the commission.

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. Using the numbers above: The %2,345 would be spread across the levels this way. There would be no commission paid on the first $500, the second $500 would earn 10%, the next $500 would earn 12%, the next $500 would earn 14% and the last $345 would earn 16%.

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.

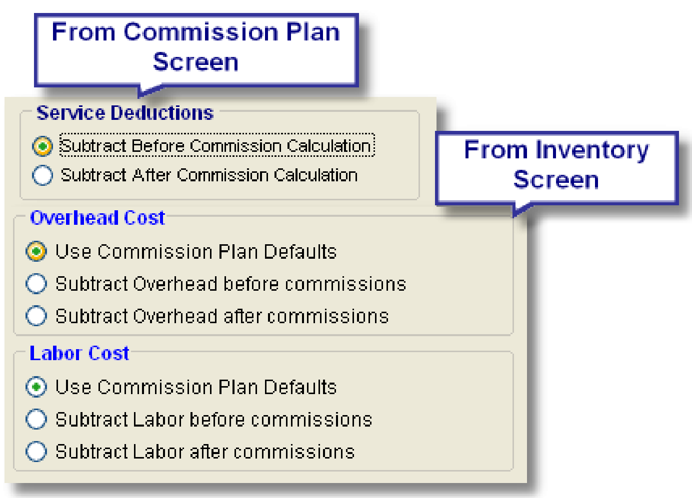
Service Plan Overrides

The 4 check boxes 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 this 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.

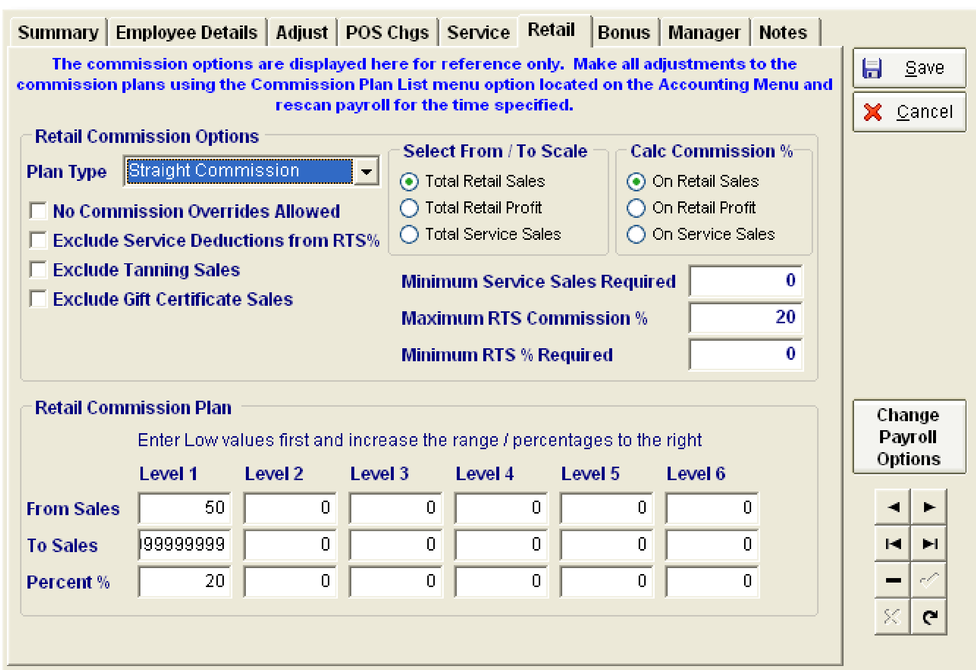
Note: If you don't want to use the levels, place in Level 1 a zero or starting amount for commission in the "From Sales" field, an extremely high amount in the "To Sales" field and set the standard percentage you pay. For example if you pay a 7% commission on all sales above $250, place $250 in Level 1's "From Sales" field, $100,000 in the "To Sales" field and 7 in the "Percent %" field.

- ## 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 in the setup.

Retail Commission Plan Details

Using this payroll screen, you may the change the "Retail" items for this employee, during this pay period only. If you wish to make the change permanent, you must change the plan using the "Commission Plan" choice on the accounting menu.



Plan Type

There are two choices and they both use the Levels that you setup. 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. For example: Using the numbers shown on this sample screen, if an employee had $2,345 in sales it would place them at the range described by Level 4 and the program would multiply $2,345 by .16 to solve for the commission.

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. Using the numbers above: The %2,345 would be spread across the levels this way. There would be no commission paid on the first $500, the second $500 would earn 10%, the next $500 would earn 12%, the next $500 would earn 14% and the last $345 would earn 16%.

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.

No Commission Overrides Allowed

Check this box so that anything that 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 plan. This will effectively increase the amount paid on commission.

Excluded Sales

Check any items that you do not want to pay commission on.

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 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.

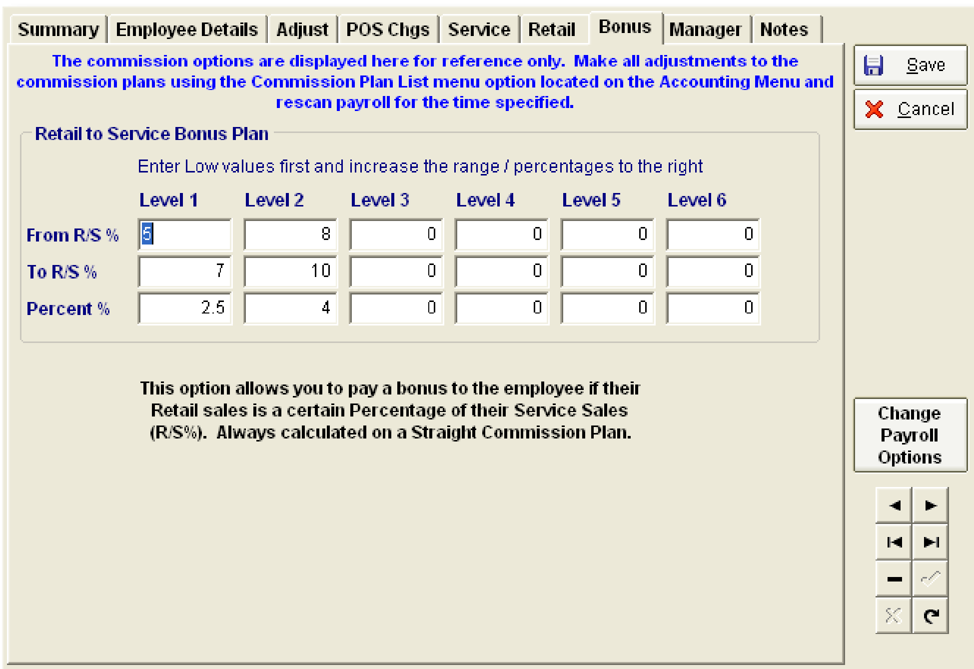
Commission Plan Levels

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 Plan Details

Using this payroll screen, you may the change the "Retail to Service Bonus" items for this employee, during this pay period only. If you wish to make the change permanent, you must change the plan using the "Commission Plan" choice on the accounting menu.



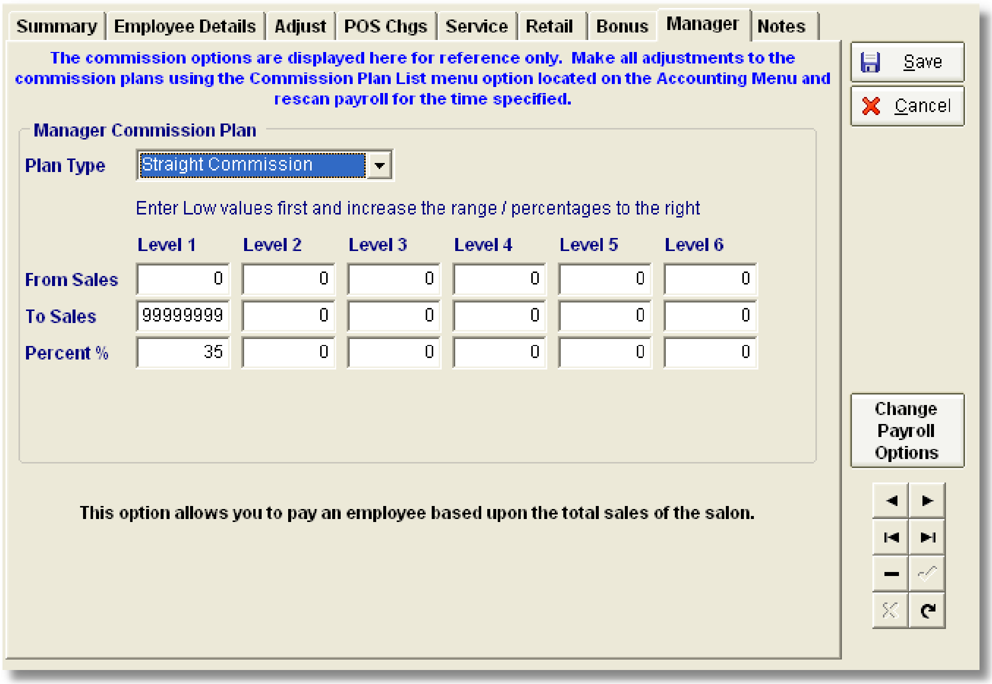
The purpose of this plan is to provide a bonus to Service employees (Hair Stylists, Estheticians, etc.) who sell large amounts of Retail products. The values you enter here will be used to calculate a Bonus, which is in ADDITION to the commission they receive for selling Retail products. It works by 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 Plan Details

This screen displays the commission plan you have setup for an empoyee that will receive commission based upon the total sales of the salon.



Plan Type

There are two choices and they both use the Levels that you setup. 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.

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.

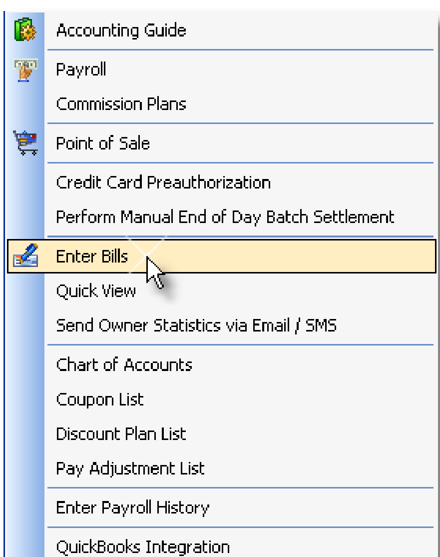
Note: If you don't want to use the levels, place in Level 1 a zero or starting amount for commission in the "From Sales" field, an extremely high amount in the "To Sales" field and set the standard percentage you pay. For example if you pay a 7% commission on all sales above $250, place $250 in Level 1's "From Sales" field, $100,000 in the "To Sales" field and 7 in the "Percent %" field.

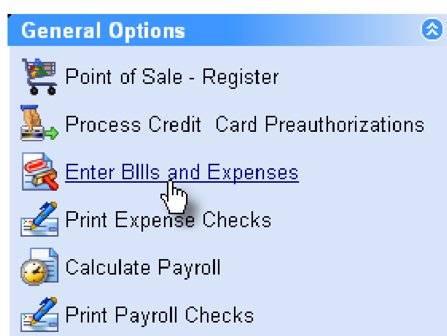
Payroll Notes

Enter any notes that need to be kept on record into this area for the payroll you are working on.

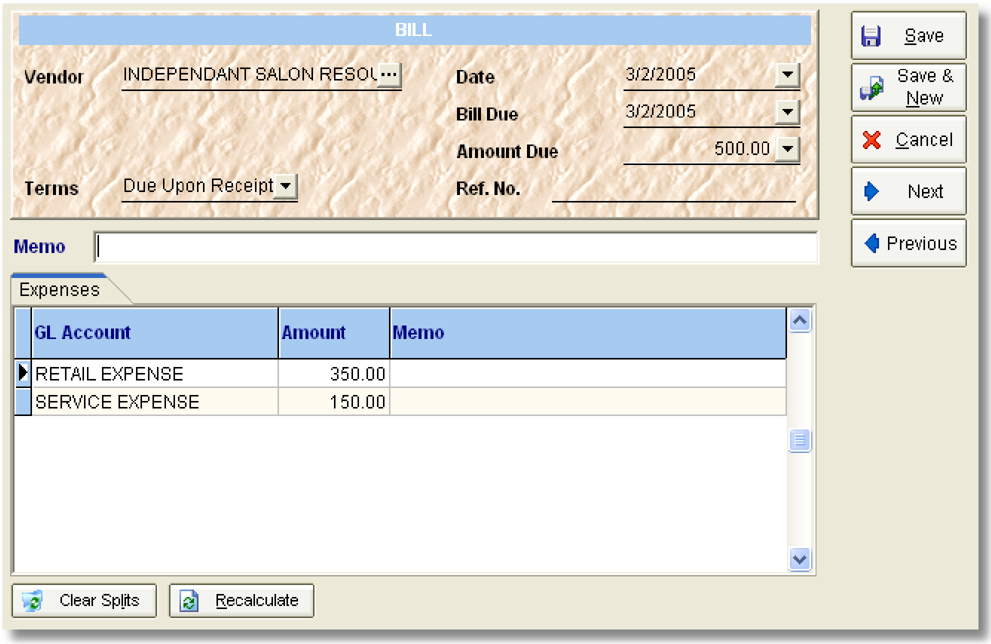
Enter Bills

This screen can be reached by clicking on "Accounting from the menu bar and selecting "Enter Bills" as shown in the image below. This list can also be reached by clicking on "Enter Bills and Expenses" under "General Options" on the Accounting Guide window.





Select "New" or "Edit" from the Enter Bills list to open the following screen.



Bill Vendor

Select from the drop down list the vendor you received the bill from.

Bill Date / Due Date / Amount / Ref. No.

Enter the date you received the bill, the date due, the amount of the bill and a reference number from the invoice if one is available.

Bill Terms

Select from the drop down list the terms for payment this vendor has setup with you.

Bill Memo

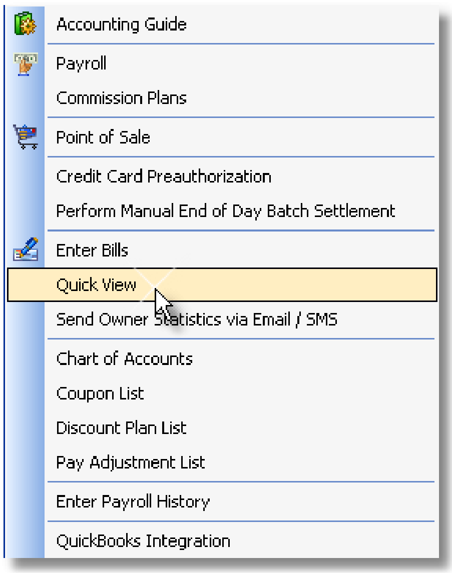
Enter any text you desire about this bill.

Bill Expenses

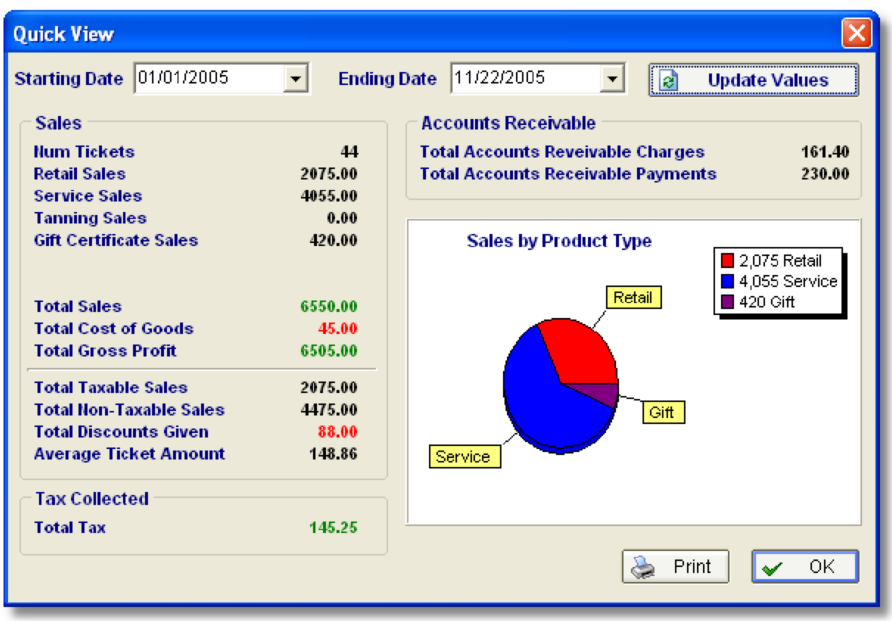
If you have setup an Accounting program, select the GL Account, Amount and a Memo if you wish.

Quick View

This screen can be reached by clicking on "Accounting" from the menu bar and selecting "Quick View" as shown in the images below:



The following screen will appear. This screen allows you to get a "snapshot" of the "Sales", "Taxes", "Accounts Receivable" and "Product Types" sold.

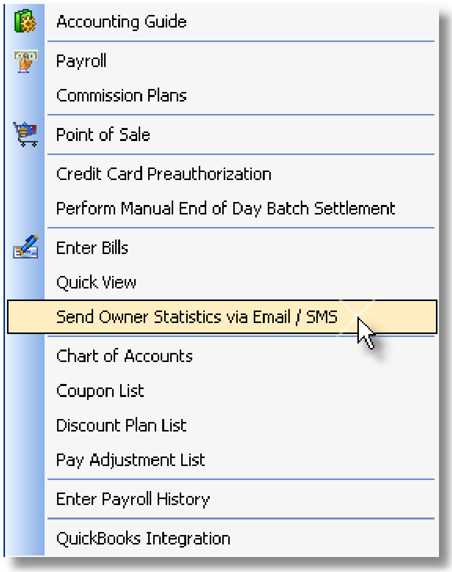


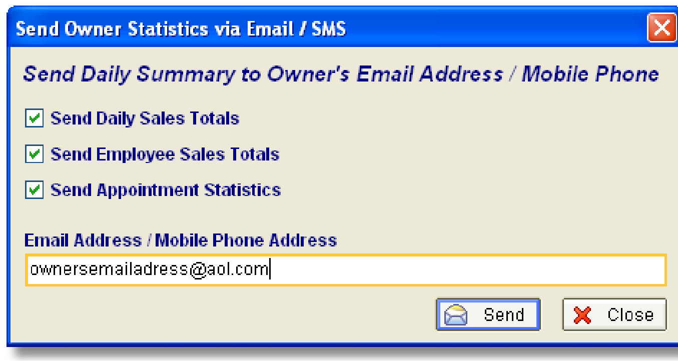
Start / End Dates - Update Values Button

Select from the drop down calendars in the Starting Date and Ending Date fields the range of dates the Quick View summary will represent.
After changing the dates you must click the "Update Values" button to cause Envision to retrieve and calculate the new information. If you are on a network and leave this screen up during the day, you will periodically need to click the "Update Values" button to get the most current information from the other stations on the network.

Send Owner Statistics Via Email / SMS

To open the Send Owner Statistics screen, click on "Accounting" from the menu bar and select "Send Owner Statistics Via Email/SMS" as shown in the image below.

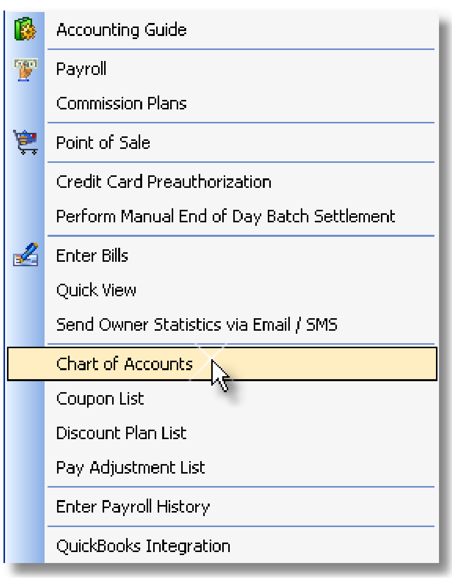


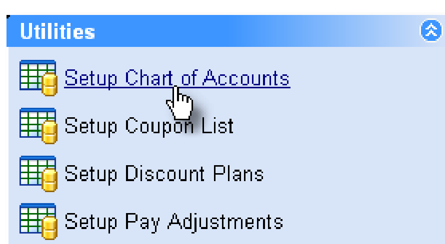


Select the type of information you would like to send and enter the owner's email address or mobile phone adress. Click the "Send" button when you are ready to send this information.

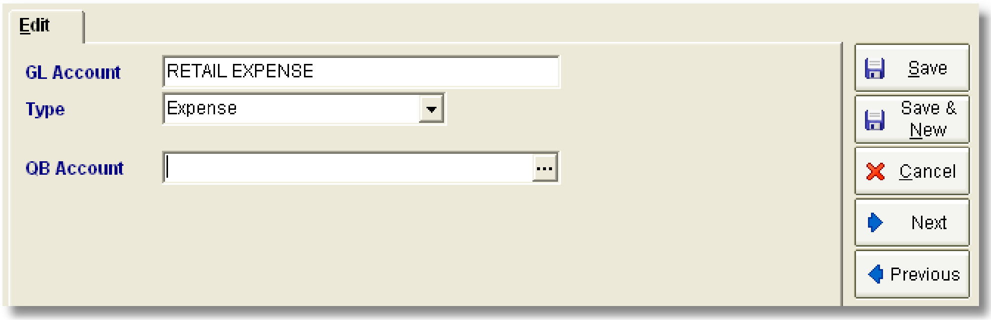
Chart of Accounts

To enter your Chart of Accounts list, click on "Accounting" from the menu bar and select "Chart of Accounts" as shown in the image below. The Chart of Accounts list can also be reached by clicking on "Setup Chart of Accounts" under "Utilities" on the Accounting Guide window.





Select "New" or "Edit" from the Chart of Accounts list to open the following screen:



GL Account

Enter the name of the General Ledger account in this field.

Type

Select from the drop down list the type of account this is.

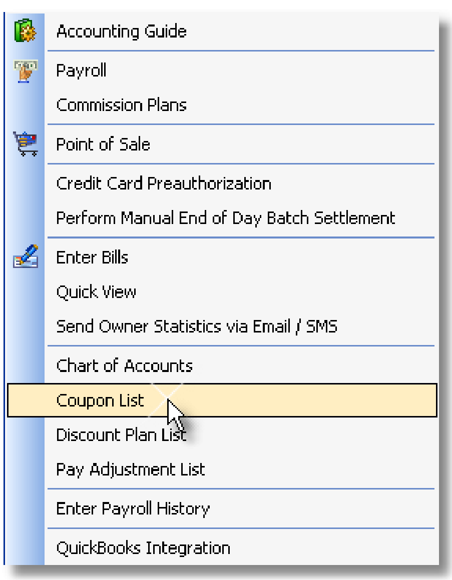
QuickBooks Account

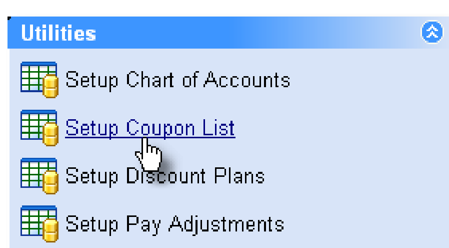
If you are using the QuickBooks integration, enter the name of the QuickBooks account associated with the selected account in this field.

Coupon List

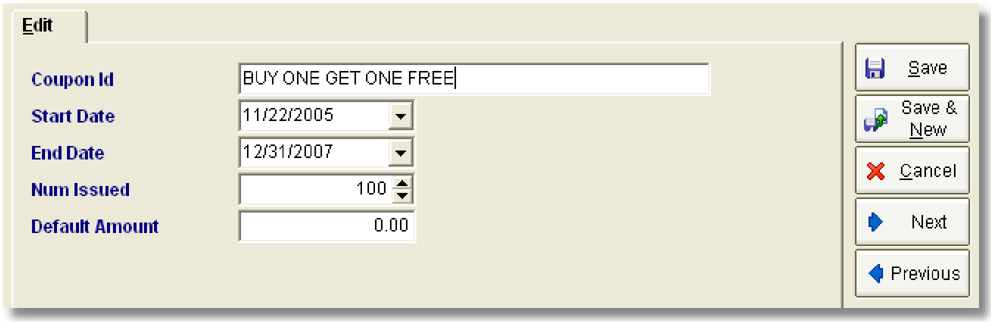
You may have coupons that your clients use for purchasing products or for discounts on certain services. It would be best to add these coupons to the Coupon List so that you may keep track of the use of these coupons.

To open the Coupon List, click on "Accounting" from the menu bar and select "Coupon List" from the drop down menu. You may also click on "Setup Coupon List" under "Utilities" on the Accounting Guide window.





Click the "New" button on the List Tool Bar to open the following screen:



Coupon Id

This can be the name or description of the coupon. This is the name that you will use to identify the coupon when you are selecting it to apply a discount to an item in the Point of Sale window.

Start Date / End Date

You may enter a Start and End date if necessary. You will not be able to select the coupon when discounting an item in the Point of Sale if the end date has passed.

Num Issued

Enter the number of coupons issued. This will allow you to keep track of how many coupons were used compared to how many were issued.

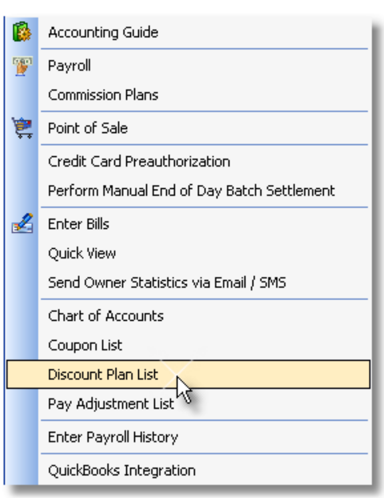
Default Amount

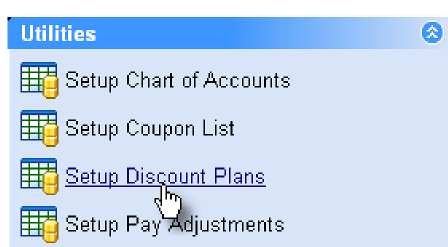
Enter a default dollar amount for the coupon. This can be changed when the coupon is selected in the Point of Sale window.

Discount Plan List

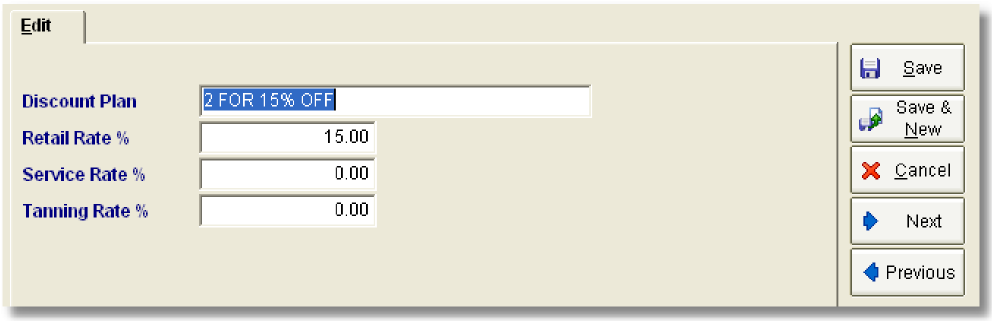
If you have memberships, or Preferred Customer plans, this screen is where you will enter any discounts these clients will receive.

When you first select the "Discount Plan List" from the "Accounting" menu, you will see a list of existing plans. You may also click on "Setup Discount Plans" under "Utilities" on the Accounting Guides window.





Double click any one of the plans to Edit it. Select "New" on the List Tool Bar to create a new plan. The Edit / Add screen is shown below with some data filled in.



Discount Plan

Enter the Name of the Plan in this area. This is what will appear on the Point of Sale and other screens.

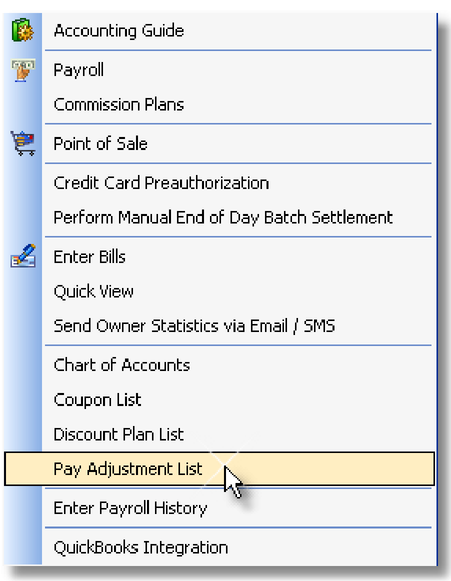
Retail, Service, and Tanning Discount Rates

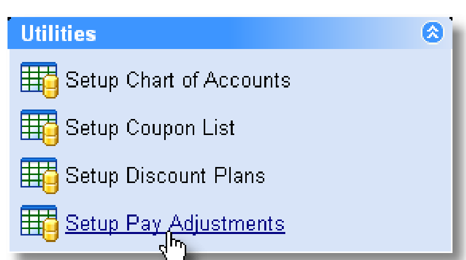
Enter the rates as whole numbers for these products. For example if you are going to allow clients that have purchased a "Preferred Customer" card to receive a 5% discount on retail products, you would enter 5 in the "Retail Rate %" field. Do the same for the Service and Tanning Rates.

Pay Adjustment List

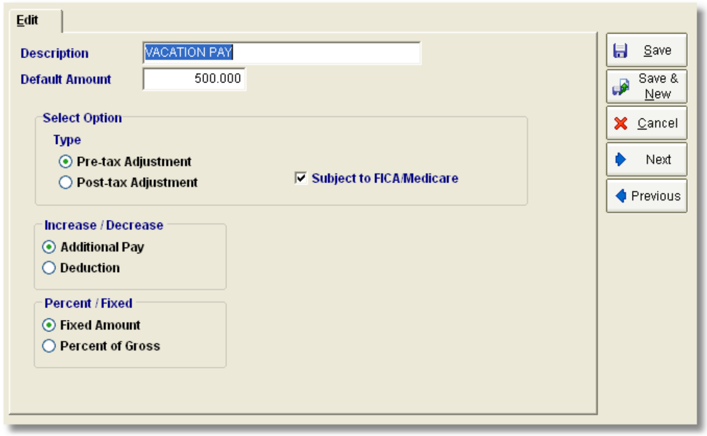
The Pay Adjustment feature is used for any additional pay or deductions that need to be added to payroll. For example, you may need to deduct a certain amount of money from each employees' paycheck for health insurance, or you may need to add Vacation Pay or a Bonus to an employee's paycheck.

The Pay Adjustment List can be accessed by clicking on "Accounting" on the Menu Bar and selecting "Pay Adjustment List" from the drop down menu. You may also click on "Setup Pay Adjustments" under "Utilities" on the Accounting Guide window.





Select "New" or "Edit" on the List Tool Bar to open the following screen:



Description

Enter a description for the adjustment you are entering.

Default Amount

Enter a default dollar amount for the pay adjustment. This can be changed when this pay adjustment is applied to an employee file. For example, if you have more than one employee that will have an amount deducted for health insurance and these amounts are different for every employee, you may change the default amount when you select the Pay Adjustment under the Payroll tab for each employee file in the Employee List.

Select Options

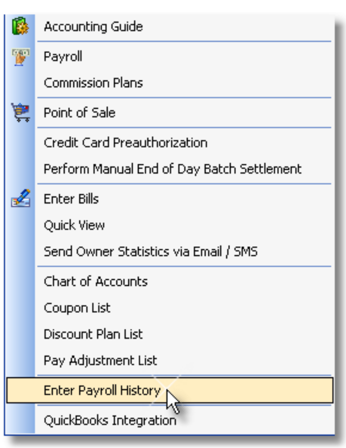
Select the type of adjustment, whether it is Pre-tax or Post-tax. You may also need to check the "Subject to FICA/Medicare".

Percent / Fixed

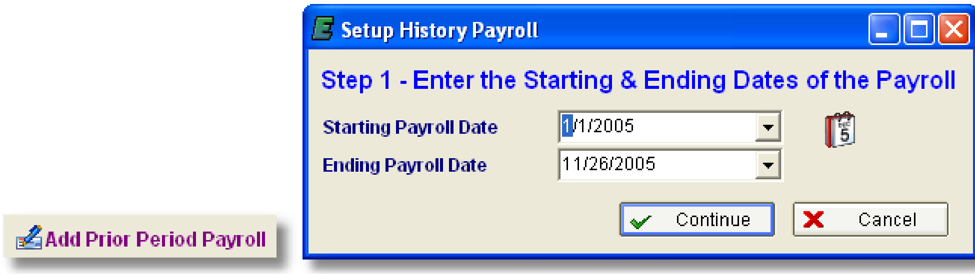
Select either "Fixed Amount" or "Percent of Gross" for the Default Amount.

Enter Payroll History

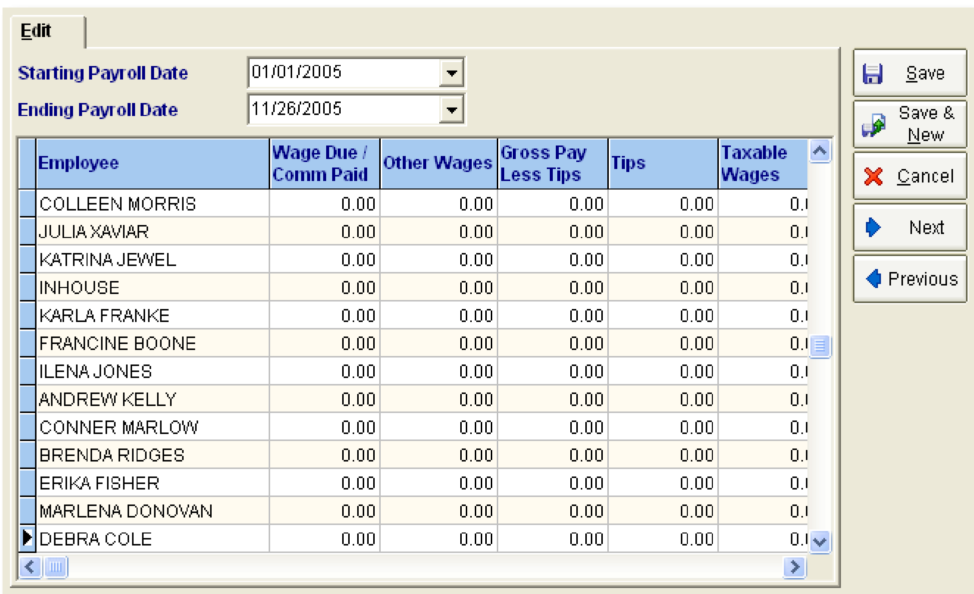
If you would like to enter past payroll history into the system, you may do this with the Enter Payroll History feature. Click on "Accounting" from the Menu Bar and select "Enter Payroll History" from the drop down menu.



Click the "Add Prior Period Payroll" button or click "Actions" and "New" to enter a new Payroll History from the Payroll History list. The following screen will appear:



Enter the starting and ending dates of the payroll and click the "Continue" button. The following screen will appear:

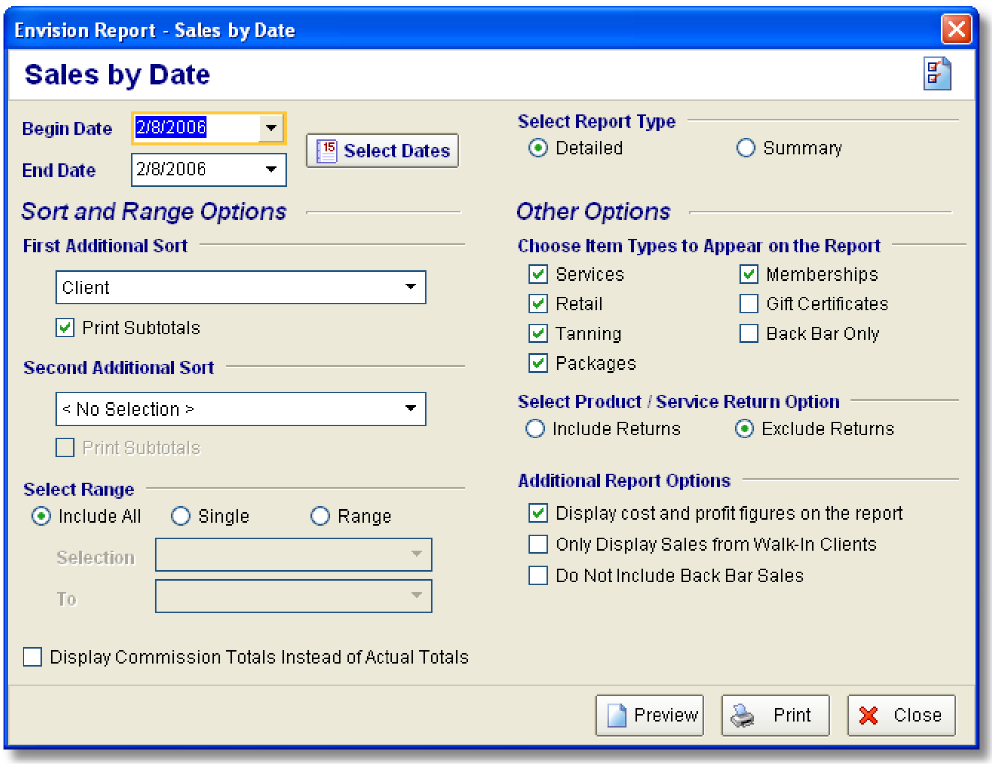


Enter all of the amounts available to you for each column and employee. Click the "Save" button to save the information you have entered or edited.

Reports & Graphs

Report Query Screens

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 two 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 for. 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

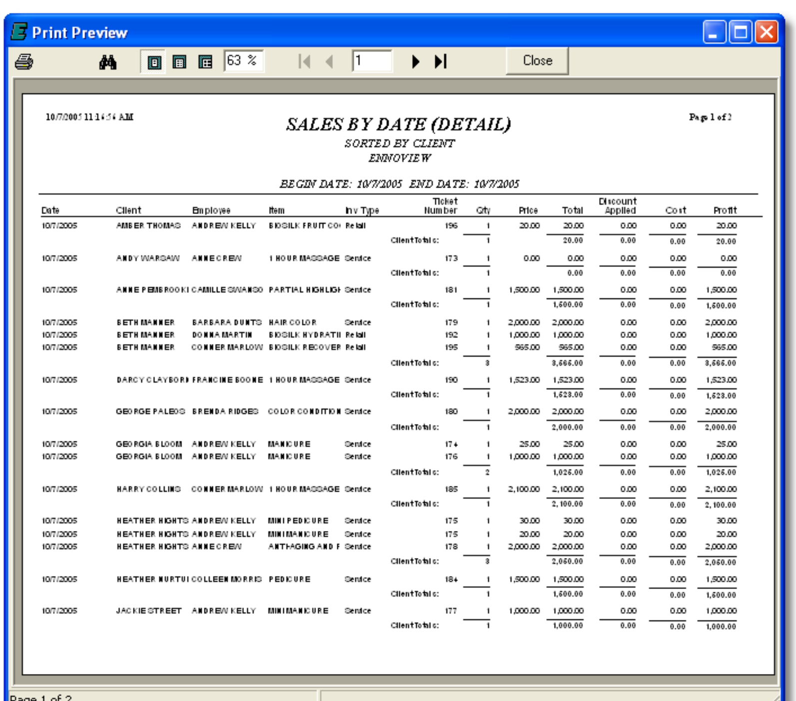
Preview: Click this button to display the report on the screen. You may send it to the printer from the preview screen.

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

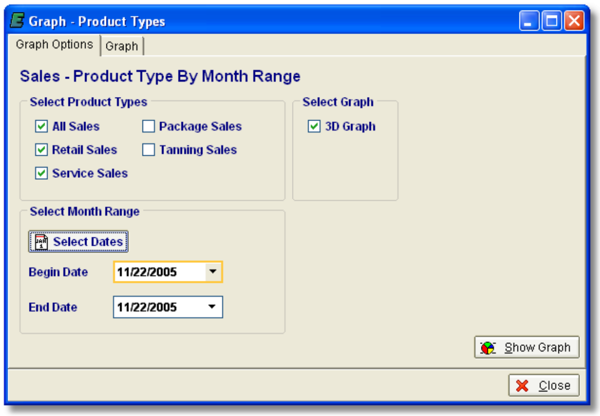
Before printing a report, you can Preview it by clicking the "Preview" button on the Query screen. This allows you to quickly see if the Query settings you have chosen yield the report you wanted. Click the various areas of the screen shot below to see some of the features of the Preview screen.



Graphs

Graph Options

A powerful feature of Envision is the ability to visually graph the information tracked by the program. These graphs can be viewed on screen or printed.



Select Product Types

Select the product types you wish to be graphed. Remember, the more products you select, the more data is displayed on the graph and may become difficult to read.

3D Graph

Click here to get a three dimensional effect for your graph.

Graph Dates

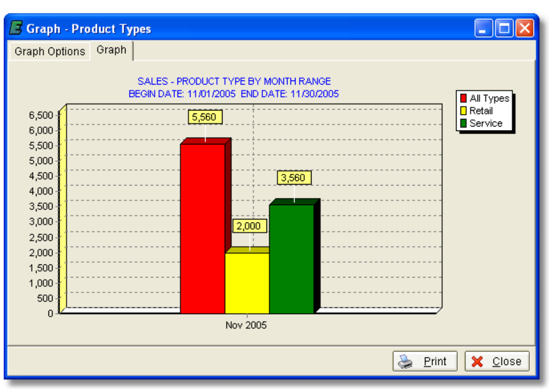
Select from the drop down calendars, the start and end dates to represent on your graph.

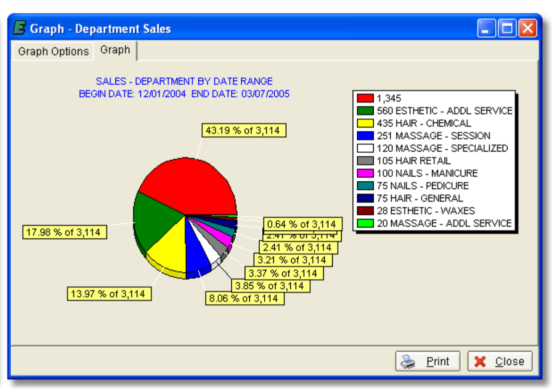
Graph - Show

Click this button to view the graph after you have made your selections.

Graphs

Click this tab to view the graph after you have made your selections. Below is an example of a couple of graphs.





Index

- 1 -

1099 107

- A -

Accounts 57
Action 113
Actions Menu 206
Active Item 57, 63, 70, 76
Activity 124
Actual Column and Fields 233
Add a Standing Appointment 197
Add an Appointment to the Waiting List 195
Add Image from Camera 131
Add Image from File 131
Add Tips to Net Pay 247, 251
Add to Waiting List 163
Adding Images 131
Address Tab 99, 118
Adjust Backbar Amount 216
Adjust Quantity / Quantity Prepaid 216, 220
Adjust Size 220
Adjustments 255
Allow Appointments to be Booked during Shop Closed / Employee Off Times 31
Allow Double Booked Appointments 31
Anniversary 118
Appointment 178
Appointment Book 99
Appointment Calendar 155
Appointment Calendar Icons 159
Appointment Calendar Overview 155
Appointment Calendar Time 157
Appointment Calendar Time / Time Slots 157
Appointment Confirmation 120
Appointment Dates 159
Appointment Frequency 197
Appointment Queue 201
Appointment Tab 178
Appointment Time Slots 157
Appointment Viewer 200
Appts 126
Assigned Resources 53
Auto Check Waiting List for Openings 31
Automatically Clear Employee Id Field 34
Automatically Set FDO When Logging In 31
Automatically Set the Preferred Stylist 31
Autoshow Checkbox 199
Available Resources 53

- B -

Back Bar 59
Back Bar (In House Use) 220
Back Bar Item 59
Back order 87
Backup 8
  Data 8
Backup and Restore 8
Balance Due / GC Outstanding 178
Bank Account Number 123
Bank Routing Number 123
Barcode 57, 63, 70, 76
Bed Description 55
Begin Servicing Client 171
Birth date 118
Birth date / Anniversary 118
Birthdate 100
Block Employee Time 162, 163
Book and Continue 178
Book Multiple Services 182
Book Multiple Services / Package 163
Book Multiple Services or Packages 162, 186, 190, 191, 192, 193
Book Multiple Services Tab 182, 186
Bulbs Last Changed On 55
Bulbs Last for (Hours) 55
By # of Sessions 72

- C -

Cache Tables 28
Calculate Overtime Hours 38
Calendar 155
Calendar Buttons 162
Calendar Colors 40
Calendar Colors Determined By Resource 31
Calendar Column Percentages 159
Calendar Department Tabs 159

Calendar Display / View 159
Calendar Name Format 31
Calendar Note Popup 159
Calendar Options 31
Calendar Refresh / Hint Delay Settings 40
Calendar Resource Caption 52
Calendar Resources 52
Calendar Standard Colors 40
Calendar Width / Height / Zoom Settings 40
Cancel Appointment 171
Cancel Appointment Button 199
Cancel Remaining Items 87
Cancellations 193
Cash / Coin Counter 235
Cash Drawer Code 49
Cash Drawer Connected 46
Cash Drawer Connections 49
Cash Drawer Setup 49
Cash Out Button 230
Cash Tab 235
CC Card Button 232
CC File Path 25
CC Server 25
CC Server Path 25
Certification List 116
Certification Setup 116
Certifications 116
Certifications Tab 102
Chart of Accounts 266
Check In 171
Check In Button 199
Check In/Out 110
Check Service Price 163, 171
Check to Alert Employee at Clock In 105
Check Waiting List 162, 163, 196
Check Waiting List for Available Appointments 196
Class 63, 70, 76, 93
Class List 93
Client 117
Client Activity 124
Client Activity Tab 124
Client Address 118
Client Address Tab 118
Client Appts 126
Client Appts Tab 126
Client Contact 118
Client Contact Information 118
Client Custom Tab 122
Client Discount 120
Client Display Area 204
Client Employer 120
Client Employer / Occupation 120
Client Formulas 125
Client Formulas Tab 125
Client ID 118
Client ID Format 28
Client Images 128
Client Is Active 118
Client Is An Employee 120
Client List 117
Client Name 118
Client No. 118
Client Notes 125
Client Notes Tab 125
Client Order History 124
Client Other 120
Client Other Tab 120
Client Payment 123
Client Payment Tab 123
Client Prepaid Activity 124
Client Purchases 125
Client Purchases Tab 125
Client Referred By 120
Client Type 120, 152
Client Type / Discount 120
Client Type List 152
Client User Type 120
Clients 117
Close Button 199
Commission 65
Commission Deductions 241
Commission Override 67, 106
Commission Overrides 252
Commission Plan 107
Commission Plan Levels 241, 243, 245
Commission Plan Name 241
Commission Plans 240
Commissions 65, 72, 79
Commissions / Costs 219
Commissions / Incentives 72, 79, 223, 226
Commissions on Packages 76
Commissions/Costs 65
Comp Item and Include In Commissions 219, 223, 226
Company Hours 26
Company Information 25

Company Sales Tax 27
Compare Images 129
Completion 63
Completion of the Quick Start Guide 24
Completion Time 63
Confirm Appointment - Left Message 171
Confirm Appointment - Talked to Client 171
Contact Information 118
Copy All Schedules 112
Copy Appointment 171
Copy Individual Employee Schedule 112
Copy Schedule 112
Cost & Commission Tab 219, 223, 226
Cost Method 28
Costs 65
Count 89
Coupon Id 267
Coupon List 267
Coupon Tab 218, 222, 225
Credit Card Button 229
Credit Card Information 123
Credit Card Preauthorization 239
Currency Format 28
Currency Format and Integer Format 28
Custom 122
Custom Tab 103
Cut & Copy Appointment 171

- D -

Daily Booth Rental 107
Daily Rental Fee 252
Deductions 241
Default City
  and Zip 28
Default Employee Markup Percent 28
Default Inventory Markup Percent 28
Default Profile 37
Default Sort Orders 28
Delay 63
Delay between Service 63
Delay Service Appointment 158
Demo 10
Demo Data 10
Department 63, 70, 76, 92
Department List 92
Department Setup 116
Description 63, 70, 76
Difference 234
Disable Automatic Daily Z-Out 34
Disable Email Services 120
Disable Email Services / Mailing Labels / Appointment Confirmation 120
Disable Printing of Gift Certificate 34
Disable weekly Backup & File Maintenance Checks 28
Discount 120
Discount Amount 217, 221
Discount Button 208
Discount Level 120
Discount Note 217, 221
Discount Plan 268
Discount Plan List 268
Discount Tab 217, 221
Discount Type 217, 221
Discounts 59
Display in POS 59, 72
Display Order 99
Disregard Employee Work Schedule 31
Disregard Qualified Services 31
Double Booked Appointments 31
Drawer Tab 234
Duplicate Clients 137

- E -

Edit Appointment 171
Edit Client Card 171
Edit Title and Notes 130
Email 39
Email Appointment Confirmation 171
Email Confirmations 203
Email Employee Notices 115
Email Notices 115
Email Server and Address 39
Email Username And PW 39
Employee Add New Message Button 105
Employee Address 99
Employee Address Tab 99
Employee Alternate Contact 99
Employee Certification 116
Employee Certification Setup 116
Employee Certifications 102
Employee Certifications Tab 102
Employee Commission Override 106
Employee Commission Plan 107

Employee County 99
Employee Custom Fields 103
Employee Custom Tab 103
Employee Dates 100
Employee Deduction 229
Employee Demographic 99
Employee Department 99, 116
Employee Department Setup 116
Employee Details 252
Employee Email 99
Employee Id 99, 110, 113
Employee KRS Consulting Settings 107
Employee List 98
Employee Messages Saved 105
Employee Messages Tab 105
Employee Name/Gender 99
Employee Note 104
Employee Notes Tab 104
Employee Other Tab 100
Employee Pager Setup 100
Employee Passwords 44
Employee Payroll Calculation 252
Employee Payroll Detail Screens 252
Employee Payroll Records 249
Employee Payroll Tab 107
Employee Phone Numbers 99
Employee POS Chgs 252
Employee Price 59, 65, 79
Employee Purchase 206
Employee Schedule 112
Employee Service Price 106
Employee Service Time 106
Employee Services Buttons 106
Employee Services List 106
Employee Services Tab 106
Employee Setup 98
Employee Social Security 107
Employee Store Location 99
Employee Taxes 250
Employee Time Clock 110
Employee Tips 230
Employee Tips Button 230
Employee Type 100, 117
Employee Type Setup 117
Employee Work History 113
Employees 98
Employees and Resources 156
Employer 120
Employer Taxes 250
Employment Status 107
Enable Program Security 37, 45
Enable Security 37
Enable Service For Online Booking 63, 70
Enable Tan / Massage Bed Selection 34
Enable Touchscreen Options 40
Enter a Manager Override Password 28
Enter Addtional Text 115
Enter Bills 263
Enter New Physical Quantity 89
Enter Payroll History 270
Exclude Sales Tax 120
Excluded Sales 243
Extra Withholding 107

- F -

Fast Cash Keys 228
Fed WH Allowance 107
Fed WH Allowance / State WH Allowance 107
Federal / State Taxes 252
Federal / State Unemployment Rates 38
Filing Status 107
Filter - Appointment Options 147
Filter - Client Options 147
Filter - Sales Options 147
Finish Servicing Client 171
Force CC On Other 1 / Other 2 Payment 46
Formula 150
Formula List 150
Formulas 125, 185, 193
Formulas and Cancellations Tabs 193
Formulas Tab 185
Future Appointments Button 208

- G -

Gender 120
Gender / Gender Preference 120
Gender Preference 120
Gift Certificates 138, 139
GL Account 266
Go to Today's Date 163
Graph Options 274
Graphs 274
Guides 5

Guides Window 5

- H -

H Rate 252
Hardware Stations 45
Hide Checked Out Clients 199
Highlight All Appointments 171
Hourly Wage 107
Hourly Wage / Yearly Salary / Pay Type 107
Hours 252

- I -

Image Editor 130
Image Library 118
Images 128
Incentives 72, 79
Include In Payroll Options 251
Included Options in Payroll Scan 247
Initial Cash In Drawer 28
Initial time 63
Initial time for Service 63
Initials 113
Integer Format 28
Intro 17
Intro Tab 17
Inventory Class 57
Inventory Cost Method 28
Inventory Department 57
Inventory Description 57
Inventory Descriptions 63, 70, 76
Inventory Display In POS 65
Inventory Item Type 81, 82, 83
Inventory Labels 90
Inventory Master List 81
Invoice 204
Invoice Breakdown 204
Invoice Listing 204
Item Edit 63
Item ID 57, 63, 70, 76
Item Notes 61
Item Sales 61
Item Search 204
Item Tab 216, 220, 224

- J -

JTech Pager Transmitter Configuration 50

- K -

Keypad 228
Keypad / Tips / Amount Due 228
KRS 63
KRS Consulting Settings 107
KRS Consulting Setup 100
KRS Level Commission 241

- L -

Labels 90
Labor Costs 65
Last Count 61
Last Count / Ordered / Received 61
Last Sale 68
Last Sale / Update 61, 68, 74, 80
Last Update 120
Lead Source 120, 151
Lead Source Type List 151
Leave Report Option Window Open 28
Licenses 116
List Tool Bar 5
Load Items 83
Location ID 25
Location of Images 25
Login Using SPA 39
Lookup Gift Certificates / Prepaids 138

- M -

Mail Application Programming Interface 39
Mailing Labels 120
Make This a Standing Appointment 171
Manage Time Cards 111
Manager Commission 245
Manager Commission Plan Details 262
Manager Commission Tab 245
Manager Override Password 28, 239
Manufacturer 57, 94
Manufacturer List 94
MAPI 39

Markup % 59
Markup Percent 28
Master Billing Account 123
Master List 81
Maximum RTS Commission % 243
Menu Bar 5
Menu Options 163, 171
Menu Options - Actions Menu / Right Click on Available (Empty) Time Slot 163
Menu Options - Right Click On Appointment (Current Date) 171
Merge and Email 149
Merge and Print 149
Merge and Print / Email 149
Merge Duplicate 137
Merge Duplicate Clients 137
Messages Tab 105
Method of Payment Buttons 227
Minimum RTS % Required 243
Minimum Service Sales 243
Modify Custom Fields 103
Move / Repeat All Appointments 171
Move Appointment 171
Multiple POS On Hold Tickets Per Client 34

- N -

Negative Inventory Quantity Values 28
Net Paid 252
New Appointment 163
New Client ID Format 28
No Commission Overrides Allowed 243
No Discounts or Price Overrides 59, 65, 72
Non-Taxable 63
Non-Taxable Item 57, 63, 70, 216, 220
Notes 125
Notes Tab 104, 238
Number of Receipts to Print 34

- O -

Occupation 120
Occupation Type 153
Occupation Type List 153
OH/Labor Comm Deduction 252
Online Booking 63
Only Display Employees with Work Hours Scheduled 31
Open Drawer 238
Open Windows 5
Options 115
Options / Sales Tax Adjustments 206
Order Level 59
Ordered 61
Ordered and Tax / Total 83
Orders 83
Other Options 44
Other Options Tab 44
Other Tab 100, 120
Outsource Payroll 247
Overhead 65
Overhead / Labor Costs 65, 219
Override 110
Override Password 28

- P -

Package Detail Buttons 77
Package Details 77
Package Details Item and Quantity 77
Package Edit 76, 83
Package Expires After 224
Package Item 77
Package Item and Quantity 77
Package Item Edit 76
Package Item Notes 80
Package Item Pricing 79
  Qty & Commission 79
Package Item Sales History 80
Package Listing 77
Package Listing Information 77
Package Notes 80
Package Price 77
Package Pricing 79
Package Pricing Amounts 77, 79
Package Quantity 77
Package Sales History 80
Pager Configuration 50
Paid Out / Paid In 234
Password 28, 110
Password and Security 100
Password and Security Level 100
Paste Appointment 171
Pay Adjustment List 269
Pay Greater of Wages or Commission 107
Pay On Account 231

Pay Out Button 208
Pay Type 107
Payment 123, 227
Payment 1 & 2 228
Payment Checklist 236
Payment History 232
Payment Type 123
Payment Type Totals 234
Payroll 247
Payroll Adjustment 255
Payroll Adjustments 252
Payroll Check Number 252
Payroll Dates 247, 251
Payroll Frequency 247, 251
Payroll Options 38, 251
Payroll Outsource 38, 251
Payroll Period 107
Payroll Statistics 250
Payroll Summary 250
Payroll Summary Items 250
Payroll Tab 107
Physical Count 89
Physical Count Item Information 89
Physical Count Original Columns 89
Physical Quantity 89
Plan Type 241, 243, 245
PO Add/Remove Item Buttons 83
PO Date 83
PO Expected On 83
PO Load Items 83
PO Number 83
PO Ordered and Tax / Total 83
PO Ordered From 83
PO Save / Cancel Buttons 83
PO Ship To 83
PO Ship Via and Terms 83
PO Status 83
PO Vendor Product Id (Vendor SKU) 83
Point of Sale Buttons 208
Pole Display Connections 48
Pole Display Messages 48
Pole Display Setup 48
Pole Display Use 48
POS Change Window Delay (Sec) 34
POS Charge Allowance 256
POS Check Out 171
POS Checkout Button 199
POS Chgs 256
POS Emp Ded Allow 107
POS In-house Employee 34
POS Options 34
POS Payroll Charges 256
Post Tax Pay Adjustments 252
Preauthorization 239
Preauthorize 25
Preauthorize Credit Card Receipts to Allow for Tip Entry 25
Preferences 25
Prepaid 124
Prepaid (Series) 224
Prepaid Activity 124
Prepaid Button 208
Prepaid Packages 76
Prepaid Packages Only 76
Prepaid Selection 216
Prepaids 138, 183, 191
Prepaids Tab 183, 191
Prepay Commissions 76
Prepay Commissions on Packages 76, 226
Prevent Editing of History Appointments 31
Price 59, 67
% Disc and Recalc Button 77
Price / Time Exceptions 67
Price Overrides 59
Pricing 65
Qty & Commission 59, 65, 72
Pricing Table 59, 65
Print 238
Print Calendar 156, 163, 171
Print Client Agenda (Traveler) 171
Print Document 171
Print Document Button 208
Print Item Id Instead of Item Description 34
Print Labels 87
Print Next Appointment 34
Print Payroll Check Button 252
Print Remaining Balance on Gift Certificates 34
Print Remaining Balance on Prepaid Items 34
Print Schedule 156
Print Schedules 163, 171
Print Style 46
Print Summary Button 252
Print Work Ticket 171
Print Work Tickets 163
Printer 46

Printer – Prompt to Print / Cash Drawer Connected 46
Printer Characters 46
Printer Model 46
Printer Setup 46
Printer Start / End Code 46
Printer Type 46
Product Buttons 204
Product Cost 223, 226
Product Edit 57
Product ID 83
Product ID (also called Item ID) 83
Product Pricing 59
Product Pricing Table 59
Program Preferences 25
Program Security 45
Promotional Message 50
Prompt Before Appointment Drag-n-Drop 31
Prompt to Check for Future Appointments 34
Purchase Orders 83
Purchases 125, 184, 192
Purchases Tab 184, 192
Put On Hold Button 208

- Q -

Qty on Hand 59
Qty on Order 59
Queue 201
Quick Books Interface 25
Quick Start Guide 16
Quick View 265
QuickBooks 25
Quickbooks Account 266
QuickBooks File 25

- R -

Reason & Notes 113
Recalculate / Rescan Buttons 252
Recall Ticket 206
Receipt Employee / Client Format 34
Receipt Messages 50
Receipt Messages Setup 50
Receipt Print Style 46
Receipt Printer 46
Receipt Printer Characters 46
Receipt Printer Model 46
Receipt Printer Type 46
Receipt Promotional Message 50
Receive Items 87
Received 61
Received PO information 87
Received Qty and Cost 87
Received Qty and Cost – Tax/Total 87
Received To Date 87
Received To Date and Back order 87
Receiving 87
Receiving Inventory 87
Referred By 120
Referred By Client 120
Referred By Employee 120
Refresh Appointments 163, 171
Refresh Button 199
Register 7
Register Program 7
Registration Screen 7
Remaining Hours 55
Remove Coupon Button 218, 222, 225
Remove Item 87
Remove Item Button 224
Remove Ticket 206
Reorder 59
Reorder Alert 59
Reorder At 59
Repeat / Requested Employee 178
Repeat Appointment 171
Report Option Window 28
Report Query Screens 272
Require Note When Blocking Employee Time 31
Required Again 63
Required Again time 57, 63
Reset Default Colors 40
Resource 63, 70
Resource Active 52
Resource Categories 53
Resource Category Buttons 53
Resource Color 52
Resource Id 63
Resource Selection 63, 70
Resource Title Color 52
Resources 52, 53
Restore 8
    Data 8
Retail Commission 243

Retail Commission Plan Details 259
Retail Commission Tab 243
Retail Edit 57
Retail Item 59, 61
Retail Item Notes 61
Retail Item Pricing
Qty & Commission 59
Retail Item Sales History 61
Retail Product 57
Retail Product Edit 57, 81
Retail to Service % 243
Retail to Service Bonus 245
Retail to Service Bonus Plan Details 261
Retail to Service Bonus Tab 245
Retail to Service Percent Table 245
Return / Credit a Gift Certificate 206
Return POS 230
Return to POS 238
Review Z-Out History 238

- S -

Sale 59, 65, 79
Sale Button 208
Sale Price 59, 65
Sale/Employee Price 59, 65, 72, 79
Sales Account 63, 70, 76
Sales breakdown 237
Sales History 61, 68, 74, 80
Sales History Starting and Ending Dates 61
Sales Person 120
Sales Person / Stylist / Lead Source 120
Sales Tab 237
Sales Tax 27, 57
Salon Schedule 163, 199
Save Photo 131
Scale Calendar Rows to Fit Display 40
Scan Barcode Button 83, 87
Scan Payroll Data 251
Schedule 112
Schedule Appointment 178, 182, 183, 184, 185
Search and Sort 5
Search Results 190
Secure Password Authentication Protocol 39
Security 37, 43, 44, 45
Security Levels 44
Security Profile buttons 43
Security Profile Name 43
Select Coupon ID and Enter Amount 218, 222, 225
Select Default Sort Orders 28
Select Employee 115
Select From To Scale / Calc Commission % 243
Select State Code 247, 251
Select Station Id 51
Sell a Gift Certificate Button 208
Send & Close 115
Send Email Confirmations 203
Send Owner Statistics Via Email / SMS 266
Send Using MAPI 39
Series 76
Series (Prepaid Packages Only) 76
Service Commission 241
Service Commission Plan Details 257
Service Commission Tab 241
Service Edit 63
Service Item 65
Service Item Edit 63, 82
Service Item Notes 67
Service Item Pricing
Qty & Commission 65
Service Item Sales History 68
Service Notes 67
Service Plan Overrides 241
Service Price 106
Service Price Level 100
Service Pricing Table 65
Service Sales 68
Service Time 63, 67, 106
Service Type 63, 216
Services List 106
Services Tab 106
Set Front Desk Operator 163
Set Inventory Barcode to Item No. 28
Set Tax Year 247, 251
Set the Default Employee Markup Percent 28
Set the Default Inventory Markup Percent 28
Set the Initial Cash In Drawer 28
Setup and Activate Filters 147
Setup Calendar Colors / Options 40
Setup Calendar Options 31
Setup Calendar Resources 52
Setup Clients 24
Setup Company Information 17, 25
Setup Email 39
Setup Employee Passwords and Security Levels 44

Setup Employees 19
Setup Hardware 45
Setup Merge 146
Setup Payroll Options 38
Setup POS Options 34
Setup Program Options 18, 28
Setup Program Preferences 25
Setup Resource Categories 53
Setup Retail Products 21
Setup Security 43
Setup Security Profiles 43
Setup Services 22
Setup Tanning Beds 55
Setup Tanning Services 23
Setup Tax Options 18, 27
Setup Theme 40
Setup Vendors 20
Shared Cash Drawer 49
Shared Cash Drawer Station Number 49
Show / Hide Month Calendar 163
Show In Appointment Calendar 99
Show Notes 61, 67, 73, 80
Show Percent Booked 40
Show Popup Window of Client Notes 31
Show Service Price Level 1 28
Single Session 72
Size 59
Sliding Scale Commission 241, 243, 245
Slots Available 183
Slots Available Tab 183
Social Security 107
Software License Agreement 1
SPA 39
SSN & Drivers License 123
Standing Appointments 197
Standing Appts 162, 163
Start a New Payroll 247
Start Date 100
Starting Balance 234
State WH Allowance 107
State WH Exempt 107
Stated Column 233
Station Configuration 45
Station Id 46, 51
Station Number 49
Station Printer Setup 46
Std Commissions 252
Store Hours 26
Straight Commission 241, 243, 245
Stylist 120
Subtotal 234
Switch to All Employee Daily View 156
Switch to Resource Only View 156, 163, 171
Switch to Single Employee Weekly View 156

- T -

Take Photo 131
Tanning Beds 55
Tanning Edit 70
Tanning Item Edit 70
Tanning Item Notes 73
Tanning Item Pricing 72
  Qty & Commission 72
Tanning Item Sales History 74
Tanning Notes 73
Tanning Pricing 72
Tanning Pricing Table 72
Tanning Sales History 74
Tanning Session Edit 82
Tax Rate 1 27
Tax Rate 2 27
Tax Rates 27
Tax Rates 1 & 2 83
Tax when Ordering 57
Tax Year / State Code / Payroll Frequency 38
Taxable 27
Taxable Wages 252
Termination Date 100
Test Printer / Drawer Buttons 46
Theme 40
Time Cards 111
Time Clock 110
Time Clock Check In/Out 110
Time Clock Date/Time 110
Time Clock Employee ID & Password 110
Time Clock Override 110
Time Slots 157
Time Slots Available 190
Time Slots Available Tab 190
Time to Complete Service 63
Time Used (Min) 55
Tips 230
Tips / Amount Due 228
Tips Received and Reported Manually 252
Tool Bar 5

Transaction Checklist 236
Transaction Type 236
Transactions 232
Transparency Bar 199
Type of Notice 115
Type Setup 117

- U -

Unemployment Rates 251
Unit Cost 59
Unlimited by Day 72
Unlimited by Month 72
Unlimited by Week 72
Unlock Code 7
UoM 59
Use Demo Data 10
User Interface 5
User Type 120, 154
User Type / Referred By 120
User Type List 154
Utility Menu 11

- V -

Vendor 57, 96
Vendor List 96
Vendor Product Id 83
Vendor SKU 57, 83
Video Source 131
View Agenda Button 199
View All Images 128
View Audit Screen 163
View Client Images 171
View Client's Daily Agenda 163, 171
View Client's Next Appointment 163, 171
View Color Legend 163
View Daily Cancellations 163
View History Button 208
View Menu 171
View On Hold Button 208
View Phone Number on Calendar 31
View Single Employee 159
View Waiting List 163
Viewing Reports 273
Void History Payment Button 232
Void Ticket 206

- W -

W Salary 252
Wages/OT Due 252
Waiting List 162, 194
Walk-in Price Level 34
Weekly Backup & File Maintenance Checks 28
Word Processor 141
Work Date & Time 113
Work History 113
Work Hours 112
Work Ticket Button 199

- X -

X-Charge 25

- Y -

Yearly Salary 107

- Z -

Z-Out 206, 233
Z-Out and Start New Drawer 238
Z-Out Buttons 238