PayFirst Salon User Guide:

❖ This user guide will outline basic system functionality such as:

- ✓ Logging into System
- ✓ Back Office Setup
  - Setting up Employees
  - Menu Setup
  - Retail Product Setup
  - Creating Package Setup
  - Customer Setup
  - Loyalty Program Setup
  - Discount Setup
  - Sales Commission Setup
- ✓ Dashboard Functions
  - Service Count
  - Start Service/Check In/ Waiting List
  - Fast Sale
  - Make/View Appointments
  - Payments
  - Create Custom Packages
  - Menu Options Controls

Logon Screen

Figure 1

1. Enter the default password **1**
2. Click on **Back Office**
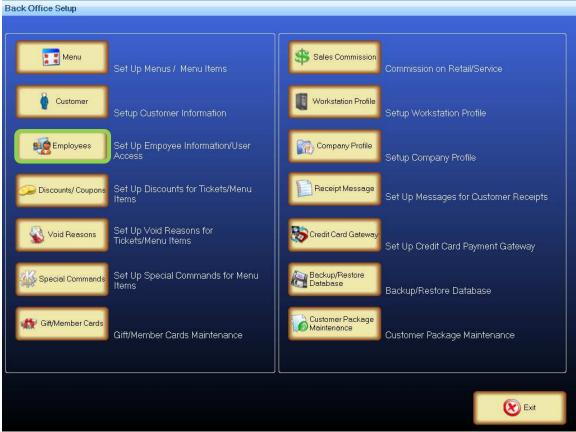
Back Office Setup

Figure 2

Click on the **Employees** button to access the employee setup page. This will bring up the employee setup screen.

Employee Setup

Figure 3

Click on the **Add New** button located on the bottom of the page. This will bring up the detailed employee setup information page.
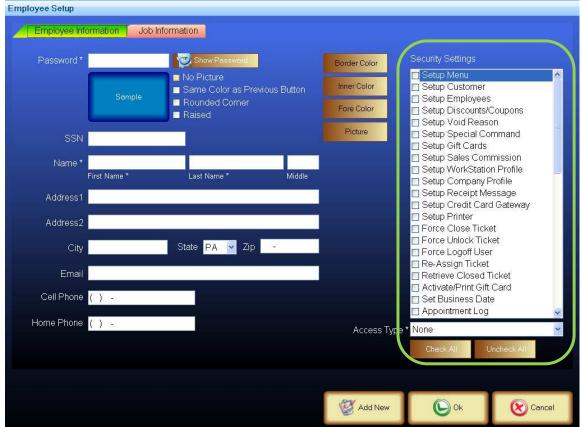
Employee Information

Figure 4

In this step you will create the employee user database:
1. Enter the password for the employee that the file is being created for (password must be unique).
2. Password may be alpha or numeric minimum 1 character with a maximum combination of 15 characters.
3. Password and Name fields are minimally required fields, all other fields are optional.

Security settings:

Business owners or management can decide what functions each employee(s) are allowed to perform. This provides added security to the business by allowing you to limit access to certain functions and capabilities.

❖ Under *access type* click on the drop down box to select the default system access for Owner, Manager or Employee.

To customize security access for a specific employee, in the Security Settings review each item, check/uncheck an item to allow or deny access to the system.

Job Information

Figure 5

1. Enter employee job information *Figure 5*.
2. When form is completed click **OK** to save.

Menu Setup

Figure 6

Before setting up menu items, create the Revenue Department, Vendors, and Main Category first.

Revenue Department Setup

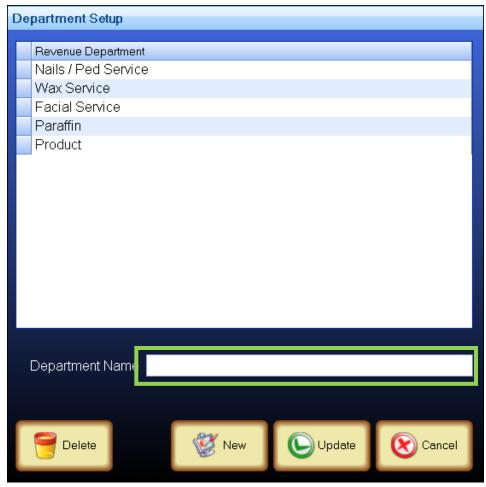**Figure 7**

1. Click on the **Menu** button on the *Back Office Setup* Screen
2. Click on the **Revenue Department** button on the *Menu Setup* screen.
3. Type in the Department name *Figure 7* (e.g. product, facial service, etc…) and click **Update**.
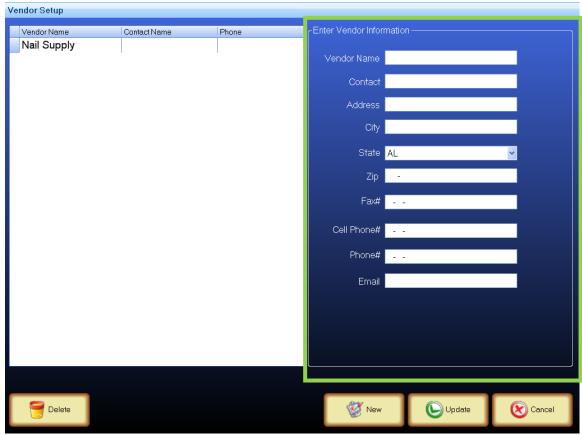4. Click **Cancel** when finished.

Vendor Setup

Figure 8

1. Click on the **Menu** button on the *Back Office Setup* Screen
2. Click on the **Vendors** button on the *Menu Setup* screen.
3. Fill out the information accordingly and click **Update**.
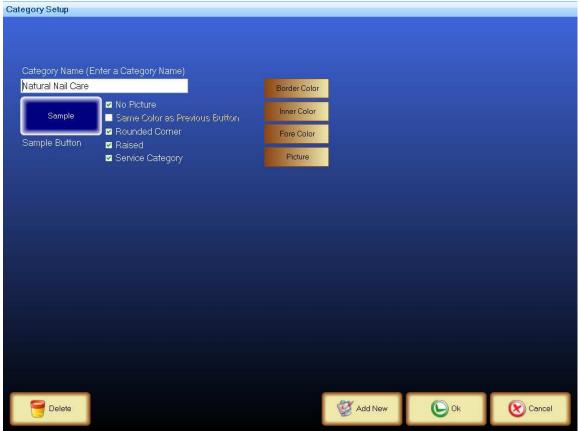4. Click **Cancel** when finished.

Category Setup

Figure 9

1. Click on the **Menu** button on the *Back Office Setup* Screen
2. Click on the **Main Category** button on the *Menu Setup* screen.
3. Enter the name of the *Category* that you wish to create *e.g. Natural Nail Care.*
4. Customize the button to suit your needs.
5. To create an additional *Category* button select **Add New** and repeat the steps 1 & 2.
6. When completed click the **Ok** button this will bring up the *Menu Setup screen*.
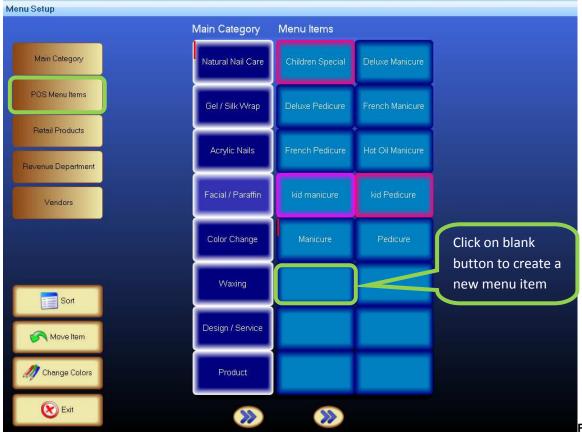
Menu Items Setup

Figure 10

Once the *Categories* are created, next setup the *Menu Items* by clicking on **POS Menu Items** on the Menu Setup screen.

1. Click on the **POS Menu Items** button. A series of buttons will appear next to your *Main Category* buttons.
2. Click on a blank **Menu Item** button to create a new Menu Item. This will bring up the *Menu Item Setup* screen *Figure 11*.
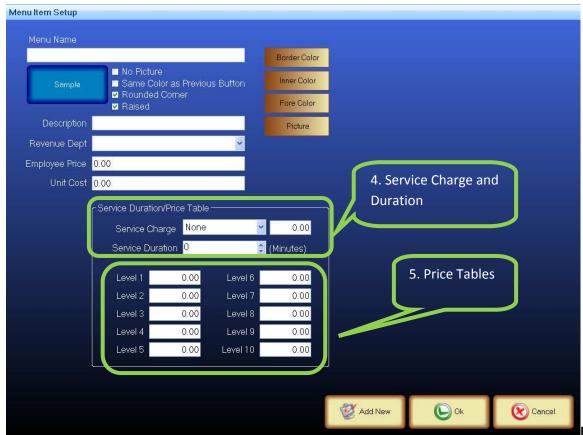
Menu Item Setup Detail

4. Service Charge and Duration

5. Price Tables

Figure 11

1. Enter your Menu Item Name.

2. Next modify the button to suit your needs.

3. Fill out the information accordingly.

4. Fill out the *Service Charge* and *Duration* if applicable.

5. Fill out the *price level* according to your employee(s) if applicable.

Retail Product Setup
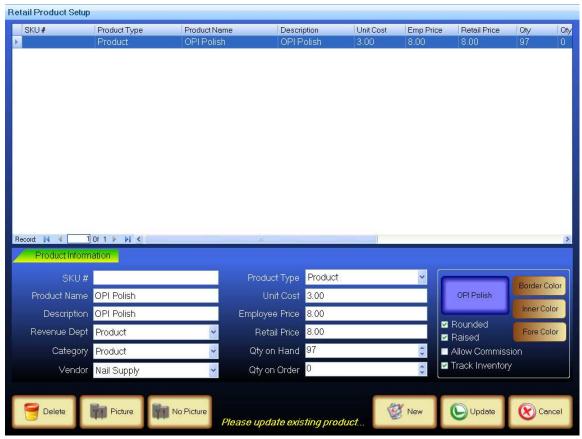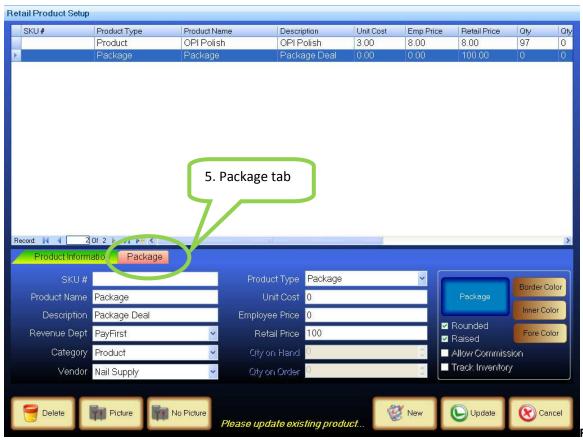

Figure 12

1. Click on **Retail Products** from the *menu setup* screen.

2. Enter all applicable information for the Product.

3. Modify the button to suit your needs.

4. Check off *Allow Commission* and *Track Inventory* if it applies to this item.

5. Click **Update** to save.

Creating a Package

Figure 13

1. Click on **Retail Products** from the *menu setup* screen.

2. Enter all applicable information for the Package.

3. Click on the drop down menu to change *Product Type* to **Package**.

4. Modify the button to suit your needs.

5. Click on *Package* tab *Figure 13.*
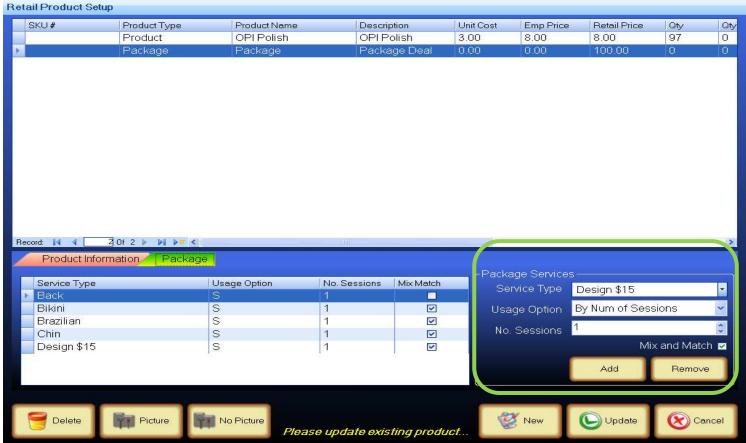
Package Tab

Figure 14

1. Click on drop down menu on *Service Type* to add services to this package.
2. Click on drop down menu on *Usage Option* to select option for this package (By Number of Sessions, Unlimited by Day, Week or Month).
3. Enter number of session(s) included in this package.
4. Check off *Mix and Match* if you are creating a variety of services for this package (e.g. pick 2 of the 5 services listed).
5. Click on the **Add** button, to add the service to the list.
6. Repeat steps 1-5 to add all services to this package.
7. Click on **Update** button to save.

Next move this package to the POS Menu Items *Figure 15.*
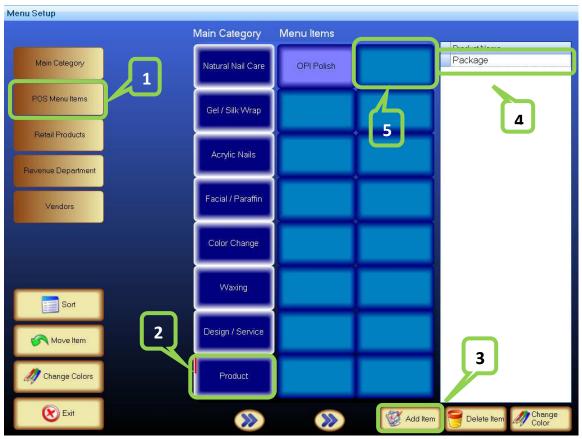
Moving Retail Product to Menu Items button

Figure 15

1. Click on the **POS Menu Items** button.
2. Click on the **Product** button. *Package* was created under *Product* category.
3. Click on the **Add Item** button.
4. Click on the **Package** created earlier in this exercise.
5. Click on the **Blank** button. This will move the *Package* to this button *Figure 16.*
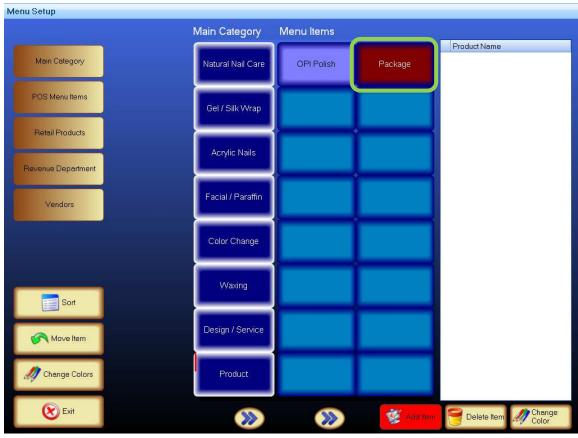
Moving a Retail Product to the Menu Items section
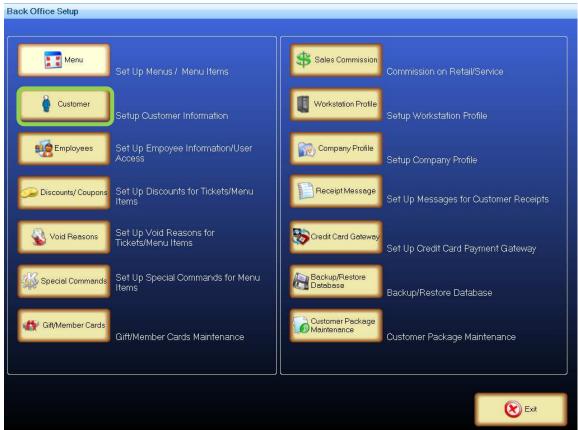

Figure 16

Customer Setup

Figure 17

1. Click on the **Customer** button on the *Back Office Setup* screen.
2. Click on **Customer Setup** button *Figure 18.*
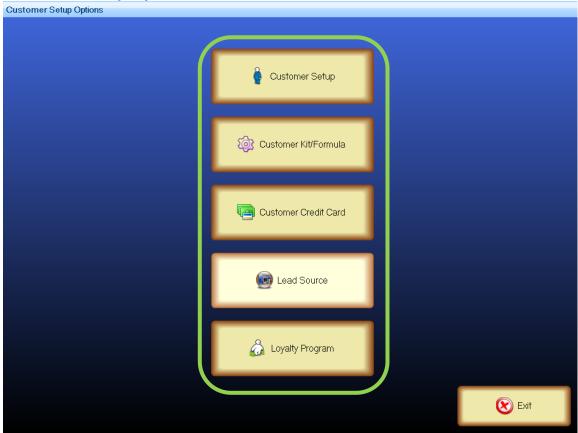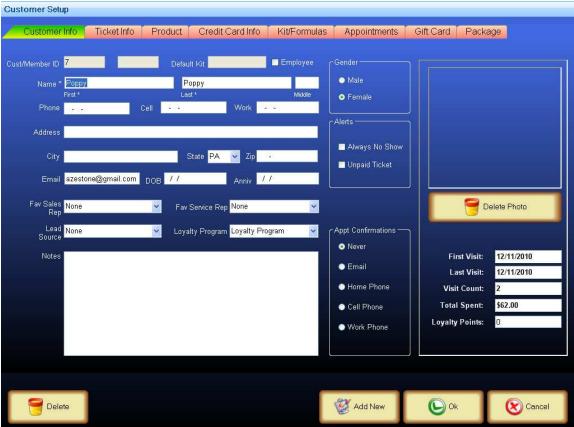
Customer Setup Options

Figure 18

Customer Setup

Figure 19

Click on **Add New** or **Edit** to bring up the *Customer Setup* screen *Figure 20.*

Customer Setup Details

Figure 20

1. Fill out the information accordingly.
2. The Customer Setup Details screen is also use to view all the existing client detail information by clicking on various tabs.
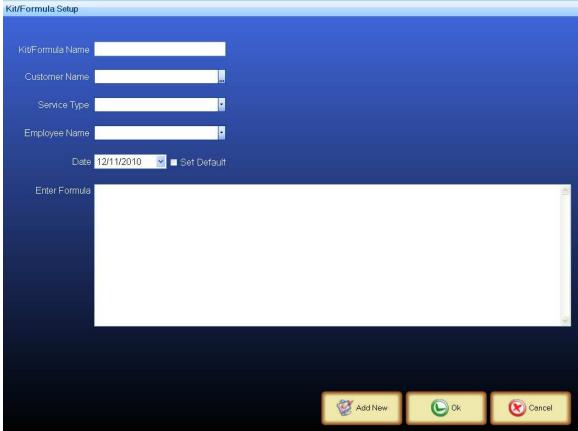
Customer Kit/Formula

Figure 21

1. Click on **Customer Kit/Formula** button on the *Customer Setup Options* screen.
2. Click on the **Add New** button or select a customer to edit.
3. Fill out the information accordingly.
4. Click **OK** to save.

Loyalty Program Setup

Figure 22

1. Click on **Loyalty Program** button on the *Customer Setup Options* screen.
2. Enter a Name for the loyalty program.
3. Select expiration date.
4. Select a *loyalty points* program.
5. Fill out the requirements for the loyalty points program.
6. Click on **Update** to save.

Discount Setup

Figure 23

1. Click on the **Discounts/Coupons** button on the **Back Office Setup** screen.
2. Click on the **Add New** button to open up the *Discount Setup* page *Figure 23*.
3. Fill out the information accordingly.
4. Click **OK** to save.

Commission Setup

Figure 24

1. Click on the **Sales Commission** button on the *Back Office Setup* screen.
2. Enter a name for this commission program.
3. Select a commission type.
4. Fill out the amount or percentage for each item or price range.
5. Click **Update** to save.

Main Dashboard

Figure 25

The main dashboard allows you to manage the entire front and back office of your customers/clients:
1. Appointments for the current day.
2. Clients currently in service.
3. Clients that have checked in.
4. Clients that are currently on the waiting list to be served.

Dashboard Buttons

View or print total service count for all the employees *Figure 26.*

Select a customer to check in or start service *Figure 27.*

Make a sale or start a service for walk-ins *Figure 28.*

When technician(s) are busy with other clients, new clients coming in for service are added to the waiting list queue *Figure 29.*

Select service, time, and a technician to schedule an appointment *Figure 30.*

View or adjust appointments. View by day, week, month, or department *Figure 31.*

Service Count

Figure 26

1. Click on a row right below the employees' name.
2. To get a print out of the employee service count, click on the **Print Employee** button.
3. Click Cancel when finished.

Check In

Figure 27

1. On the *Dashboard* screen, select an appointment click on the **Check In** button.
2. Click on the **Start Service** Button or **Check In** button.

Fast Sale

Figure 28

1. Click on the **Fast Sale** button on the *Dashboard screen*. This will bring up the *Fast Sale ticket* screen *Figure 28.*
2. Select the service and technician requested, click on **Send** to start service.

Waiting List

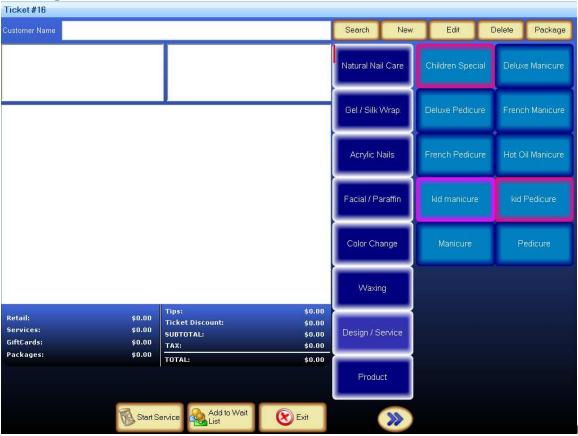Figure 29

1. Select a service and click on **Add to Wait List** button if technician is not available.
2. Click on the **Start service** button if a technician is available.

Make Appointments

Figure 30

1. Click on the drop down to select *Client Retention.*
2. Search for existing customer or add new.
3. Select a service and a technician
4. Double click on time slot to schedule appointment.

Appointment Book

Figure 31

1. Click on the **View Book** button to open up the *appointment book*.
   NOTE: Appointment can be copy, move, check in, check out or print on this screen.
2. To copy an appointment click on **Copy Appt** button, select an appointment to copy then paste it on an empty slot.
3. To move appointment click on **Move Appt** button or simply select the appointment and drag and drop it to an empty slot.
4. To check-in an appointment click on the appointment click on **Check In** button.
5. To check-out an appointment click on the appointment then click **Check Out** button.

Main Dashboard

Figure 32

When a customer is ready to pay simply bring up their tab in the service section.

1. Click on the green check mark, this will bring up the ticket screen *Figure 33.*

Ticket Screen

Figure 33

2. Click on the **Pay** button to bring up the payment screen *Figure 34.*

Payment Screen

2. Payment button

1. Tender button

Activate Member and Gift Card

Figure 34

3. Click on the tender button.
4. Select the **Cash** button or any other form of payments.

Member and **Gift Card** can also be activated on this payment screen *Figure 34*.

Ticket Screen

Figure 35

Void Ticket:

If client refuses to pay for their service, click on the **Void Ticket** button to void ticket.

Discount Ticket:

Applying discounts to ticket. Click on **Discount Ticket** button and select the applicable discount.

Note: This function may not be available to all employees

Remove Discount:

Once a discount has been applied to a ticket the button will be replaced by **Remove Discount** button. In the event the discount needs to be removed, click the **Remove Discount** button to remove discount.

Print Order:

Print out work order ticket.

Print Check:

Print out customer receipt.

No Sale:

Opens cash draw.

Send:

Send jobs to the service queue.

Open Item:

For items that are not listed on the menu. Click on the **Open Item** button. Enter name, employee, duration, price, quantity, and type. Click **Ok** when finished.

Create Package:

Create custom packages *see Figure 36.*

Taxes/Tips:

Add or Remove taxes and tips on a ticket. If taxes/tips exist on the ticket, an option will be available to remove it. If taxes/tips do not exist on the ticket, an option will be available to add it.

Next Appts:

View client future appointments.
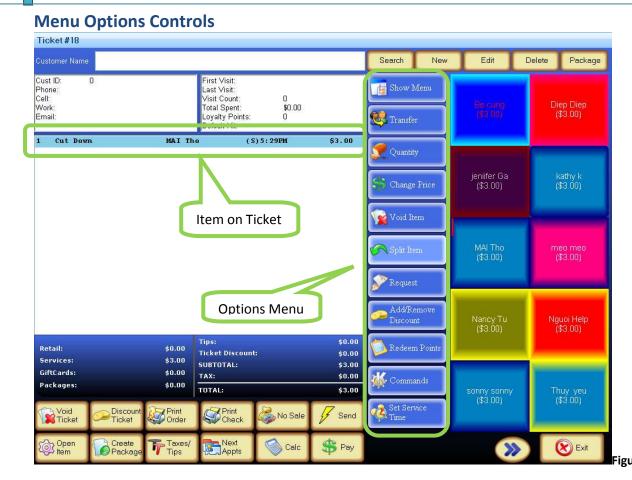
Calc:

Load the Calculator.

Pay:

Click the **Pay** button, when check is ready to settle, this will open up the payment screen *Figure 34*.

Create Custom Package

Figure 36

1. Click on the **Fast Sale** button.
2. Search for existing customer or add new.
3. Click on the **Create Package** button.
4. Click on all the services to add to this package.
5. Click on drop down button to select employee.
6. Enter a *price* for this package.
7. Click **Ok** to save.

Menu Options Controls

Figure 37

❖ To edit a menu item click the item on the ticket, this will bring up the Options menu up *Figure 37*.

Show Menu:
Return to Menu.
Transfer:
Transfer or Merge item to a different ticket.
Quantity:
Change quantity on an item.

Change Price:

Change price on an item.

Void Item:

To delete item(s).

Split Item:

Use to split item between technician(s). Click an item on ticket. Click the **Split Item** button. Select technician(s) (click on all technicians that is getting a share) and click on the **Split** button.

Request:

Type in special request

Add/Remove Discount:

   o   Applying discounts to item. Click on the **Add/Remove Discount** button and select the applicable discount.

Note: This function may not be available to all employees.

   o   In the event the discount needs to be removed, click the **Add/Remove Discount** button and select remove discount.

Redeem Points:

Using loyalty points to pay for service or products.

Commands:

A set of commands set in the system that provides instruction on the work order.