

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

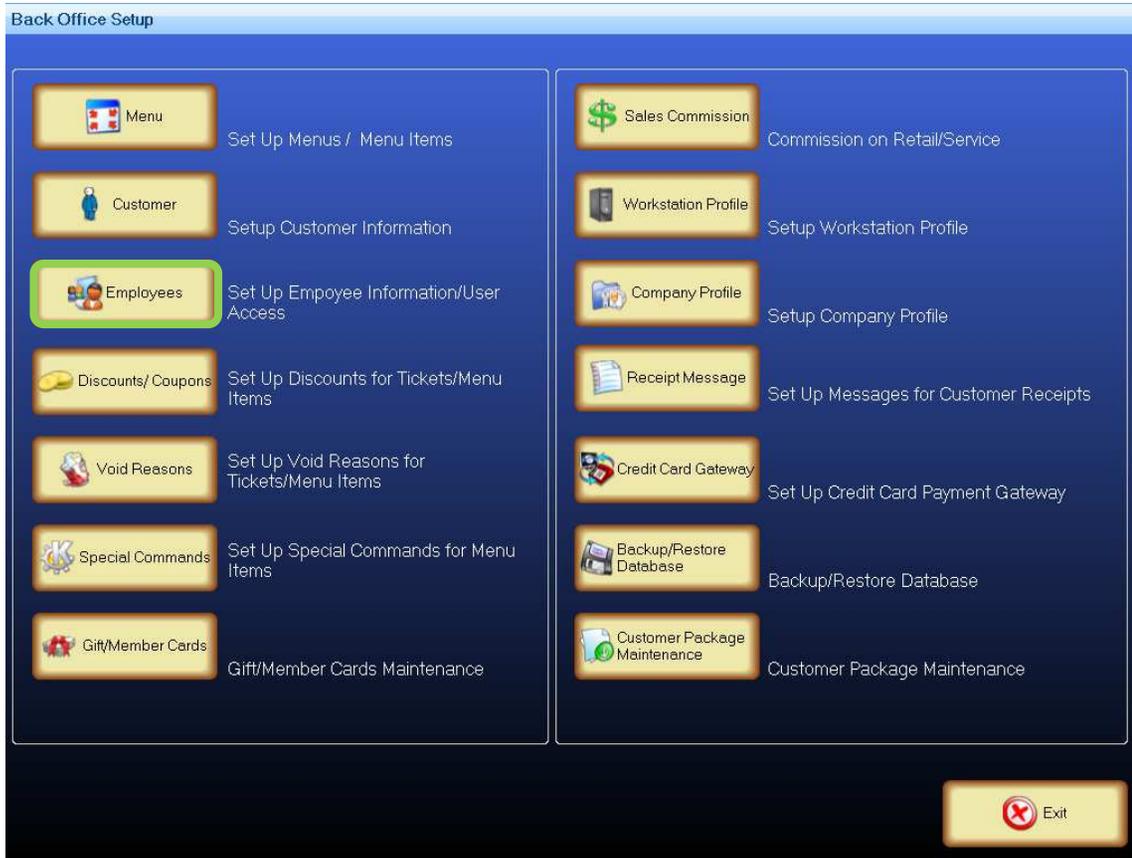


Figure 2

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

Employee Setup

Employee Setup

First Name	Last Name	Access Type	Job Name	Picture
Admin	Admin	Owner	Administration	
Be	cung	Manager	Administration	
Diep	Diep	Employee	Nail Technician	
jenifer	Ga	Employee	Nail Technician	
kathy	k	Employee	Administration	
MAI	Tho	Manager	Administration	
meo	meo	Employee	Administration	
Nancy	Tu	Employee	Administration	
Nguoi	Help	Employee	Administration	
sonny	sonny	Employee	Administration	
Thuy	Nguyen	Owner	Administration	
Thuy	yeu	Manager	Administration	
Tom	Tinh	Manager	Administration	
vin	Tho	Employee	Administration	

Buttons: Delete, Add New, Edit, Cancel

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

The screenshot shows the 'Employee Setup' window. The 'Employee Information' tab is active. Fields include Password, SSN, Name (First, Last, Middle), Address1, Address2, City, State (PA), Zip, Email, Cell Phone, and Home Phone. There are also buttons for 'Border Color', 'Inner Color', 'Fore Color', and 'Picture'. A 'Security Settings' dialog box is open, listing various permissions such as 'Setup Menu', 'Setup Customer', 'Setup Employees', 'Setup Discounts/Coupons', 'Setup Void Reason', 'Setup Special Command', 'Setup Gift Cards', 'Setup Sales Commission', 'Setup WorkStation Profile', 'Setup Company Profile', 'Setup Receipt Message', 'Setup Credit Card Gateway', 'Setup Printer', 'Force Close Ticket', 'Force Unlock Ticket', 'Force Logoff User', 'Re-Assign Ticket', 'Retrieve Closed Ticket', 'Activate/Print Gift Card', 'Set Business Date', and 'Appointment Log'. At the bottom of the form are 'Add New', 'Ok', and 'Cancel' buttons.

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

Employee Setup

Employee Information Job Information

Perform Service Sell Products

Start Dt: 12/11/2010

Job Title: Administration

Retail Commission: None

Service Price Level: 1

Wage: 0.00

Service % Split: 0

Status

W2
 Hourly
 Fulltime

Work Schedule

	From Hours	To Hours
Monday	12:00:AM	12:00:AM
Tuesday	12:00:AM	12:00:AM
Wednesday	12:00:AM	12:00:AM
Thursday	12:00:AM	12:00:AM
Friday	12:00:AM	12:00:AM
Saturday	12:00:AM	12:00:AM
Sunday	12:00:AM	12:00:AM

Add New Ok Cancel

Figure 5

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

Menu Setup

Menu Setup

Main Category	Menu Items	
Natural Nail Care	Children Special	Deluxe Manicure
Gel / Silk Wrap	Deluxe Pedicure	French Manicure
Acrylic Nails	French Pedicure	Hot Oil Manicure
Facial / Paraffin	kid manicure	kid Pedicure
Color Change	Manicure	Pedicure
Waxing		
Design / Service		
Product		

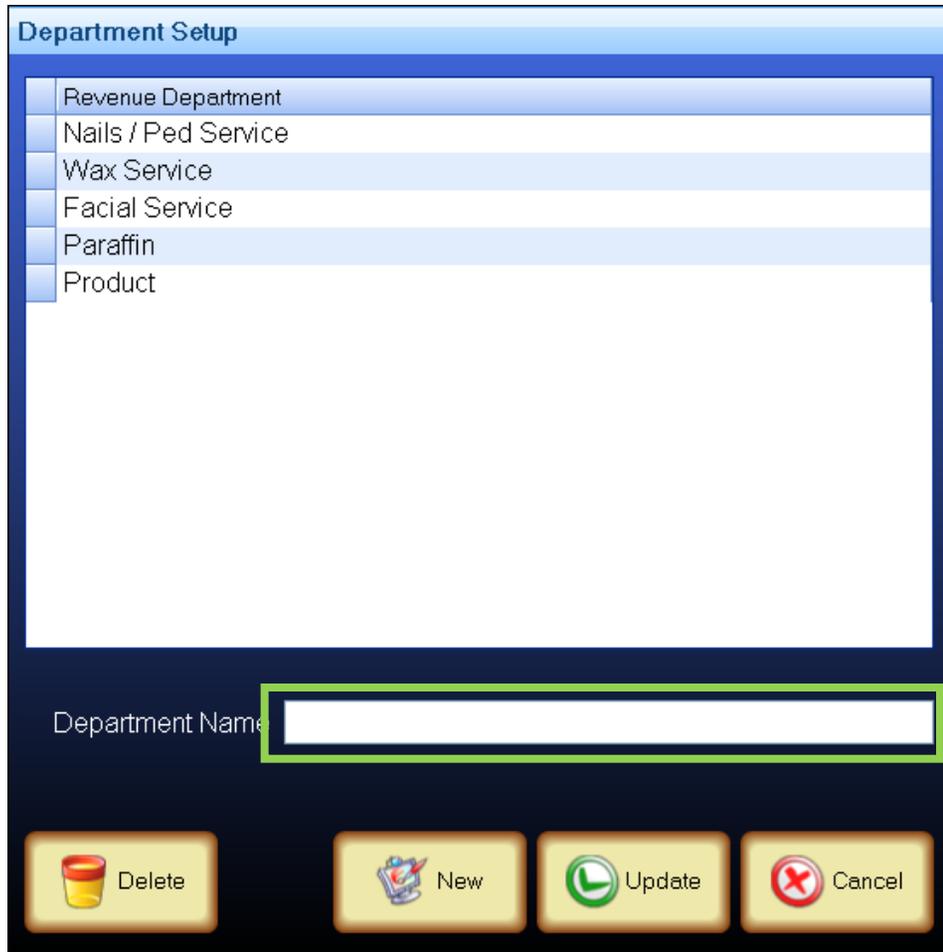
Left sidebar buttons: Main Category, POS Menu Items, Retail Products, Revenue Department, Vendors, Sort, Move Item, Change Colors, Exit.

Figure 6



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

Revenue Department Setup



Department Setup

Revenue Department
Nails / Ped Service
Wax Service
Facial Service
Paraffin
Product

Department Name

Delete New Update Cancel

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

Vendor Setup

Vendor Name	Contact Name	Phone
Nail Supply		

Enter Vendor Information

Vendor Name

Contact

Address

City

State

Zip

Fax#

Cell Phone#

Phone#

Email

Delete
New
Update
Cancel

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

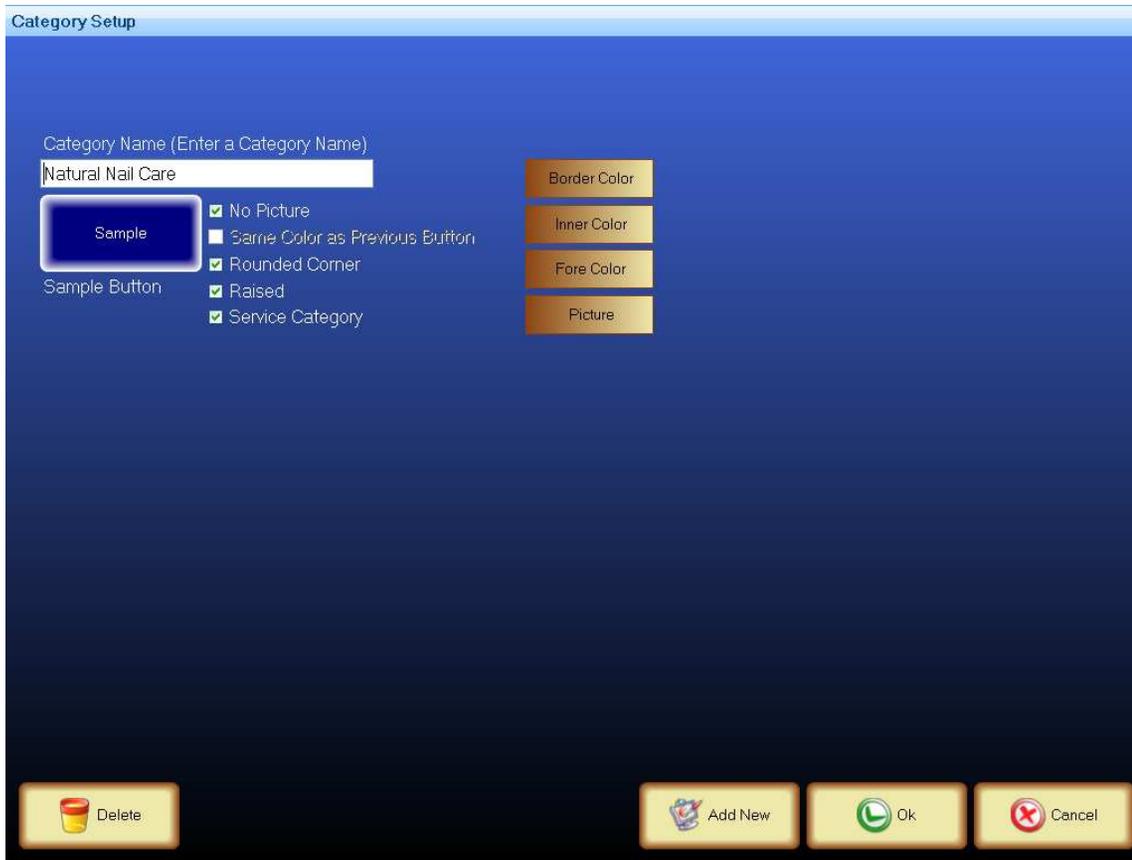


Figure 9

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

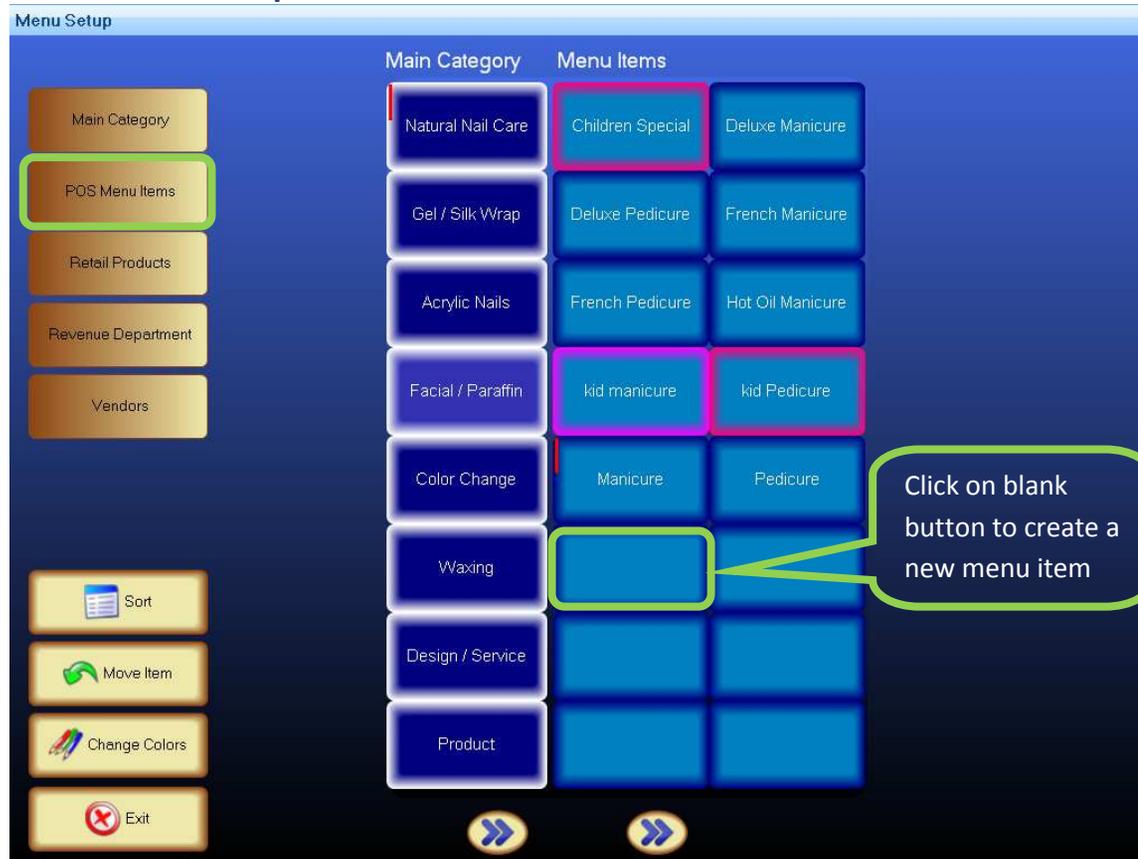


Figure 10

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

The screenshot shows the 'Menu Item Setup' form with the following fields and options:

- Menu Name:** Text input field.
- Sample:** A blue button with the text 'Sample'.
- Options:**
 - No Picture
 - Same Color as Previous Button
 - Rounded Corner
 - Raised
- Color Selection:** Buttons for Border Color, Inner Color, Fore Color, and Picture.
- Description:** Text input field.
- Revenue Dept:** Dropdown menu.
- Employee Price:** Text input field with value 0.00.
- Unit Cost:** Text input field with value 0.00.
- Service Duration/Price Table:**
 - Service Charge:** Dropdown menu (None) and text input (0.00).
 - Service Duration:** Text input (0) and dropdown (Minutes).
 - Price Levels:** A grid of 10 levels (Level 1 to Level 10) with corresponding price input fields, all showing 0.00.
- Buttons:** Add New, Ok, and Cancel.

Callouts in the image highlight:

- 4. Service Charge and Duration:** Points to the Service Charge and Service Duration fields.
- 5. Price Tables:** Points to the grid of price levels.

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

Retail Product Setup

SKU #	Product Type	Product Name	Description	Unit Cost	Emp Price	Retail Price	Qty	Qty
	Product	OPI Polish	OPI Polish	3.00	8.00	8.00	97	0

Record: 1 Of 1

Product Information

SKU #

Product Name

Description

Revenue Dept

Category

Vendor

Product Type

Unit Cost

Employee Price

Retail Price

Qty on Hand

Qty on Order

OPI Polish

Border Color

Inner Color

Fore Color

Rounded

Raised

Allow Commission

Track Inventory

Delete Picture No Picture

Please update existing product...

New Update Cancel

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

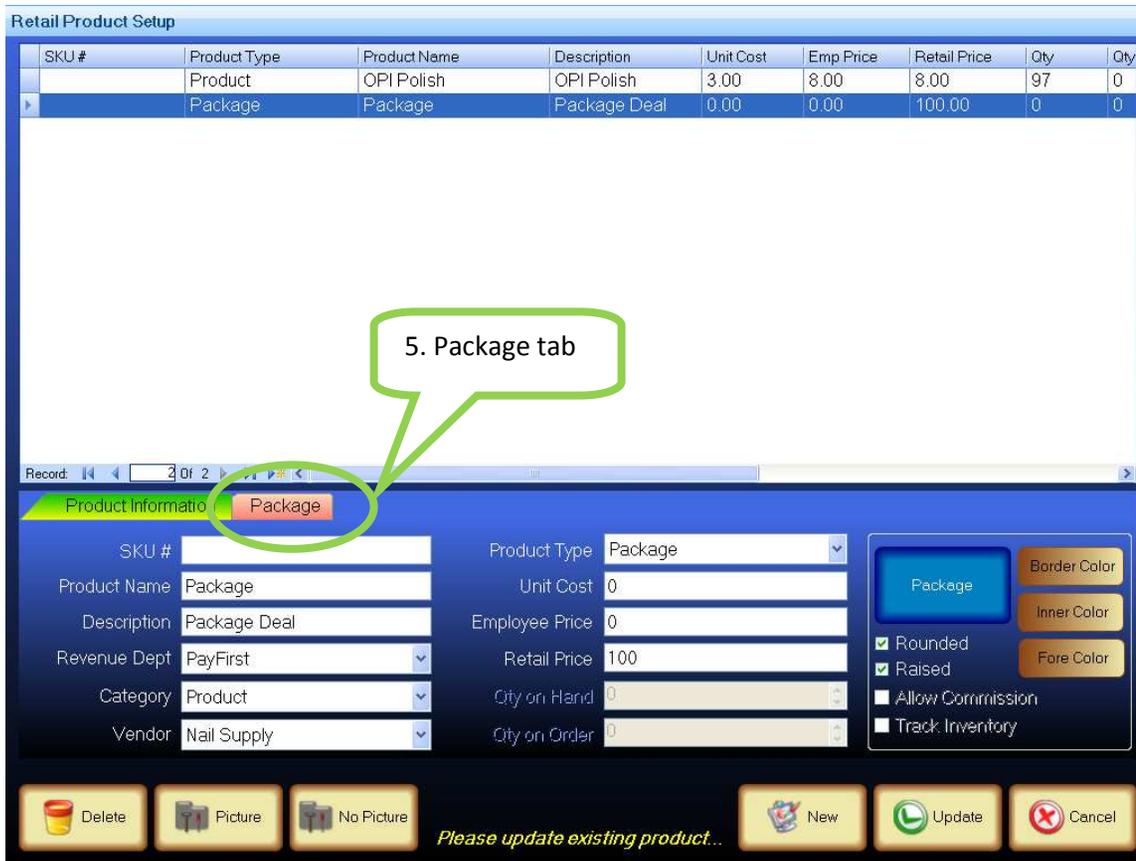


Figure 13

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

Retail Product Setup

SKU #	Product Type	Product Name	Description	Unit Cost	Emp Price	Retail Price	Qty	Qty
	Product	OPI Polish	OPI Polish	3.00	8.00	8.00	97	0
	Package	Package	Package Deal	0.00	0.00	100.00	0	0

Record: 2 of 2

Product Information | **Package**

Service Type	Usage Option	No. Sessions	Mix Match
Back	S	1	<input type="checkbox"/>
Bikini	S	1	<input checked="" type="checkbox"/>
Brazilian	S	1	<input checked="" type="checkbox"/>
Chin	S	1	<input checked="" type="checkbox"/>
Design \$15	S	1	<input checked="" type="checkbox"/>

Package Services

Service Type: Design \$15

Usage Option: By Num of Sessions

No. Sessions: 1

Mix and Match:

Add Remove

Delete Picture No Picture *Please update existing product...* New Update Cancel

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

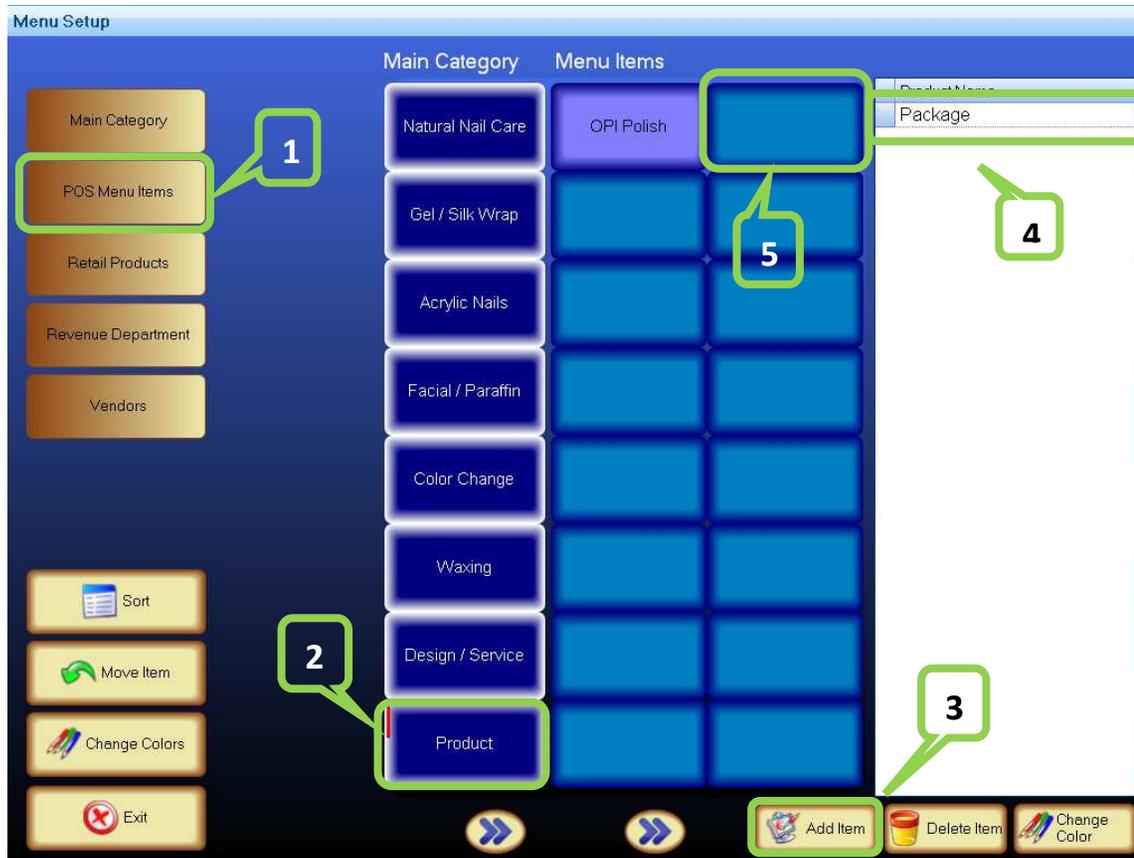


Figure 15

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

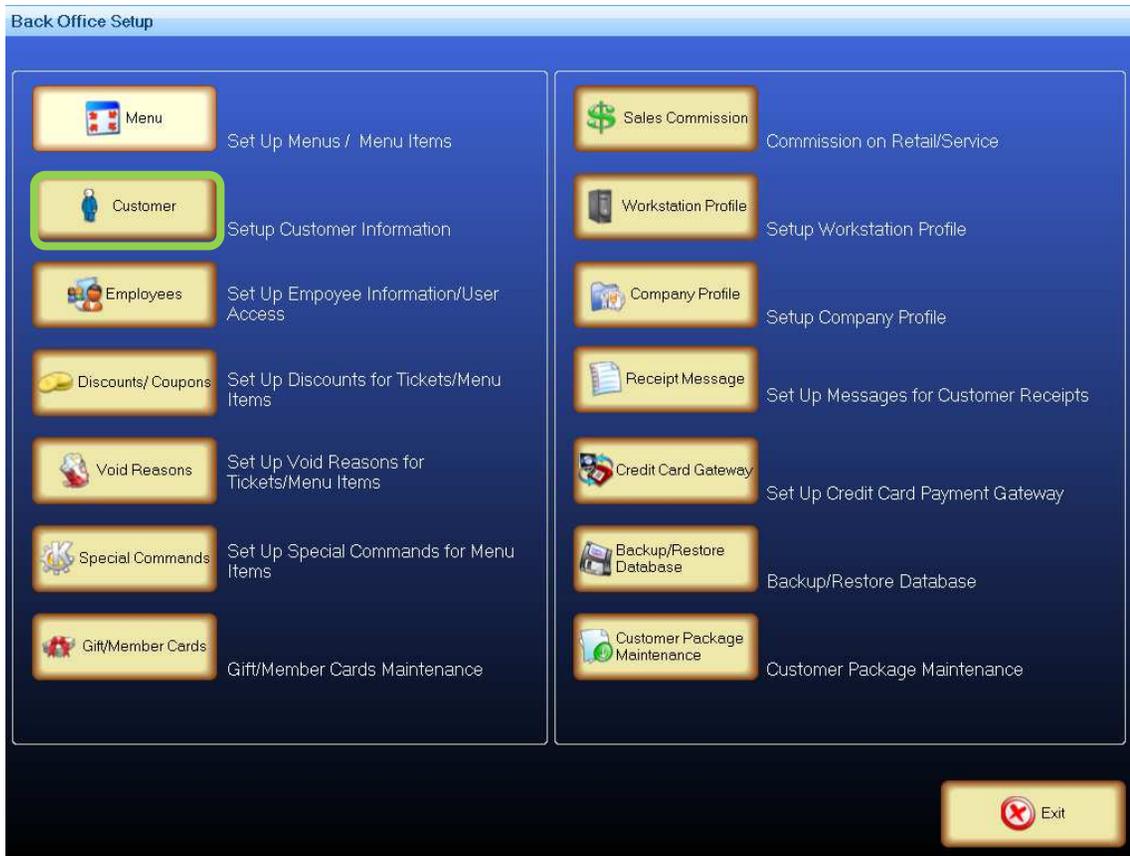


Figure 17

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

Customer Setup Options

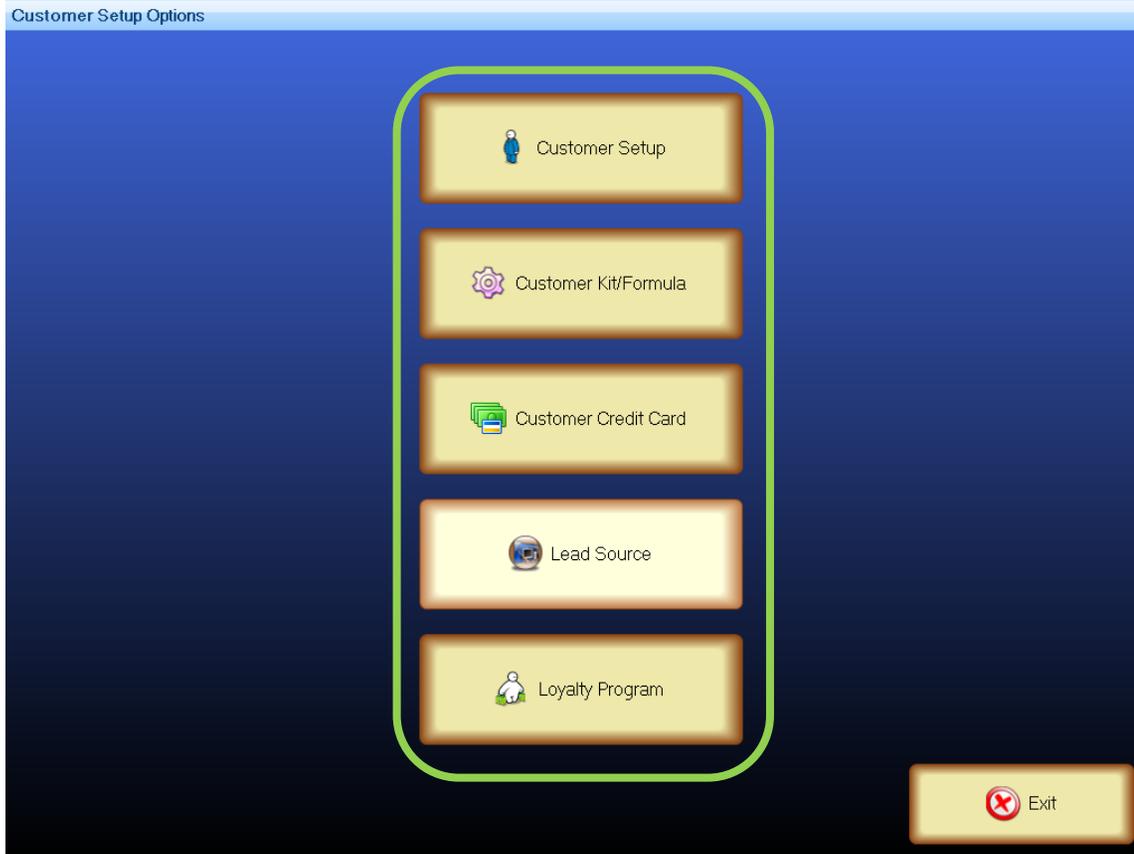


Figure 18

Customer Setup

Member ID	Customer ID	First Name	Last Name	Male	Default Kit	Phone	Email Address
	1	cindy	s	<input type="checkbox"/>			
	5	h	h	<input type="checkbox"/>			
	7	Poppy	Poppy	<input type="checkbox"/>			azestone@gmail.com
	4	robin	r	<input type="checkbox"/>			
	6	scott huynh	j	<input type="checkbox"/>			
	3	test	t	<input type="checkbox"/>			
	2	test	test	<input type="checkbox"/>			

Record: 1 Of 7

Figure 19

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

Customer Setup Details

Customer Setup

Customer Info | Ticket Info | Product | Credit Card Info | Kit/Formulas | Appointments | Gift Card | Package

Cust/Member ID: 7 Default Kit: Employee

Name *
First * Last * Middle

Phone: Cell: Work:

Address:

City: State: PA Zip:

Email: azeestone@gmail.com DOB: // Anniv: //

Fav Sales Rep: Fav Service Rep:

Lead Source: Loyalty Program:

Notes:

Gender:
 Male
 Female

Alerts:
 Always No Show
 Unpaid Ticket

Appt Confirmations:
 Never
 Email
 Home Phone
 Cell Phone
 Work Phone

Photo: 

First Visit:
 Last Visit:
 Visit Count:
 Total Spent:
 Loyalty Points:

Buttons:

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

Kit/Formula Setup

Kit/Formula Name

Customer Name

Service Type

Employee Name

Date Set Default

Enter Formula

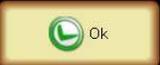
  

Figure 21

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

Loyalty Program Setup

Program Name	Expire Dt
Loyalty Program	12/11/2010

Enter Loyalty Program Information

Name

Expire Date 12/11/2010

Loyalty Points for Each Visit
 Amount Spent for Loyalty Points
 Price Range for Loyalty Points

Dollar Spent Points

=

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

Discount Setup

Discount Name (Enter a Discount Name)

Discount Description

Amount Off
 Apply Discounts To Tickets

Percent Off
 Apply Discounts To Menu Items
(Whole Number)
 Apply Discounts Automatically

Discounts Before Tax
 Discounts After Tax
 Discounts Always Active
 Discounts Only Active for Date Range

Apply to Menu Items

- Back
- Bikini
- Brazilian
- Children Special
- Chin
- Cut Down
- Deluxe Manicure
- Deluxe Pedicure
- Design \$10
- Design \$15
- Design \$2
- Design \$20
- Design \$3
- Design \$4
- Design \$5
- Design \$6
- Design \$7
- Design \$8
- Design \$9
- Eyebrow
- Facial
- Feet Color Change
- French Color Change
- French Manicure
- French Pedicure
- Full Arm

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

Commission Setup

Commission Name

Enter Commission Information

Name

Commission Type

- Flat Amount on Each Item
- Percentage on Each Item
- Flat Amount on Item Price Range
- Percentage on Item Price Range

Enter Flat Amount

Delete New Update Cancel

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

The screenshot displays the PayFirst Salon POS Main Dashboard. At the top, it shows 'Admin Admin', 'PayFirst Salon', and the date/time '12/12/2010 3:56:29 PM'. The dashboard is organized into four columns:

- Column 1 (Appointments):** Labeled '1', it lists upcoming appointments with service names and times. Examples include 'Be cing (PoppyPoppy #7)' with 'Deluxe Manicure' at 11:00 AM and 'meo meo (cindys #1)' with 'Pedicure' at 11:45 AM.
- Column 2 (In Service):** Labeled '2', it shows clients currently being served. It includes details such as price (\$12.00), service type (Manicure - 25 min), technician (sonny sonny), and completion times.
- Column 3 (Checked In):** Labeled '3', it lists clients who have checked in but are not yet in service. Examples include 'cindy s (Pedicure - 45 min)' and 'h h (Polish Change - 15 min)'.
- Column 4 (Waiting List):** Labeled '4', it shows clients on the waiting list, such as 'kathy k' with a 'Cut Down - 15 min' service.

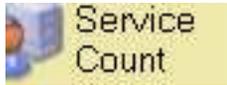
At the bottom, a toolbar contains several icons: 'Service Count', 'Check In', 'Fast Sale', 'Waiting List', 'Make Apt', 'View Book', and 'Exit'. A status bar on the left side of the toolbar provides summary statistics: 'Cust Waiting: 1', 'Cust Check In: 2', 'Estimated Wait: 12 min(s)', and 'Total In Service: \$20.00'.

Figure 25

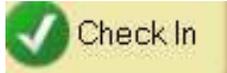
The main dashboard allows you to manage the entire front and back office of your customers/clients:

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.

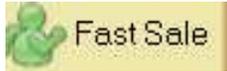
Dashboard Buttons



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



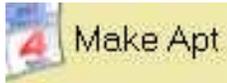
Select a customer to check in or start service *Figure 27*.



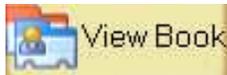
Make a sale or start a service for walk-ins *Figure 28*.



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

Service	Time	Count	Discounts	Price
Nancy Tu - 22				
Design \$8	4:15 PM	1	\$0.00	\$8.00
		Total: 1		\$8.00
sonny sonny - 9				
Manicure	4:15 PM	1	\$0.00	\$12.00
		Total: 1		\$12.00

Buttons: Print All, Print Employee, Cancel

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

Ticket #14			
Customer Name test test			
Cust ID: 2	First Visit: 3/27/2010		
Phone:	Last Visit: 10/2/2010		
Cell:	Visit Count: 2		
Work:	Total Spent: \$43.00		
Email:	Loyalty Points: 0		
	Default Kit:		
1	Brazilian	jeniifer Ga	(S)12:00PM \$60.00
Retail: \$0.00		Tips: \$0.00	
Services: \$60.00		Ticket Discount: \$0.00	
GiftCards: \$0.00		SUBTOTAL: \$60.00	
Packages: \$0.00		TAX: \$0.00	
		TOTAL: \$60.00	
 Start Service		 Check In	
		 Exit	

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

Ticket #5

Customer Name **cindy s** Search New Edit Delete Package

Cust ID: 1	First Visit: 3/24/2010
Phone:	Last Visit: 12/11/2010
Cell:	Visit Count: 2
Work:	Total Spent: \$170.00
Email:	Loyalty Points: 0
	Default Kit:

1 Pedicure	me o me o	(S) 11:45AM	\$25.00
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Retail:	\$0.00	Tips:	\$0.00
Services:	\$22.50	10% Discount:	(\$2.50)
GiftCards:	\$0.00	SUBTOTAL:	\$22.50
Packages:	\$0.00	TAX:	\$0.00
		TOTAL:	\$22.50

Natural Nail Care Children Special Deluxe Manicure
 Gel / Silk Wrap Deluxe Pedicure French Manicure
 Acrylic Nails French Pedicure Hot Oil Manicure
 Facial / Paraffin kid manicure kid Pedicure
 Color Change Manicure Pedicure
 Waxing
 Design / Service
 Product

Void Ticket Remove Discount Print Order Print Check No Sale Send
 Open Item Create Package Taxes/ Tips Next Appts Calc Pay Exit

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

Ticket #18

Customer Name

Search New Edit Delete Package

Natural Nail Care	Children Special	Deluxe Manicure
Gel / Silk Wrap	Deluxe Pedicure	French Manicure
Acrylic Nails	French Pedicure	Hot Oil Manicure
Facial / Paraffin	kid manicure	kid Pedicure
Color Change	Manicure	Pedicure
Waxing		
Design / Service		
Product		

Retail:	\$0.00	Tips:	\$0.00
Services:	\$0.00	Ticket Discount:	\$0.00
GiftCards:	\$0.00	SUBTOTAL:	\$0.00
Packages:	\$0.00	TAX:	\$0.00
		TOTAL:	\$0.00

Start Service Add to Wait List Exit

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

Make Appointments

Client Retention: Return Non-Request Customer Name: Search New Edit

Customer ID: Phone: Employee Schedule Admin Admin Date 12 / 12 / 2010

Category	Services
Natural Nail Care	Children Special Deluxe Manicure
Gel / Silk Wrap	Deluxe Pedicure French Manicure
Acrylic Nails	French Pedicure Hot Oil Manicure
Facial / Paraffin	kid manicure kid Pedicure
Color Change	Manicure Pedicure
Waxing	
Design / Service	

Sunday, December 12, 2010

Admin Admin

10 am 15 30 45

11 00 15 30 45

12 pm 15 30 45

1 00 15 30 45

2 00 15 30 45

3 00 15 30 45

Delete View Appt Block Time Change Retention Cancel

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

The screenshot displays the 'Main Dashboard' for 'PayFirst Salon' on 12/12/2010 at 7:43:41 PM. The interface is divided into several sections:

- Appointments:** A list of services with columns for 'Service' and 'Time'. Services include 'Be cung (PoppyPoppy #7)', 'jenifer Ga (testt #2)', 'Be cung (testt #3)', 'Nguoi Help (testt #3)', 'Thuy yeu (testt #3)', 'meo meo (cindys #1)', and 'jenifer Ga (hh #5)'. Each service has a corresponding time slot.
- In Service:** A detailed view of a selected appointment. It shows a price of \$25.00 for a 'cindy s (Pedicure - 45 min)' service performed by technician 'meo meo'. The 'Time Served' is 4:16:03 PM and the 'Time Complete' is 5:01:03 PM. A green checkmark icon is present next to the completion time.
- Checked In:** A column for services that have been completed.
- Waiting List:** A column for services currently in the waiting list.
- Status Bar:** Located at the bottom, it displays 'Cust Waiting: 0', 'Cust Check In: 0', 'Estimated Wait: 27 min(s)', and 'Total In Service: \$62.00'. It also includes a 'Service Count' button and a row of action buttons: 'Check In', 'Fast Sale', 'Waiting List', 'Make Apt', 'View Book', and 'Exit'.

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

Ticket #5

Customer Name **cindy s** Search New Edit Delete Package

Cust ID: 1	First Visit: 3/24/2010
Phone:	Last Visit: 12/11/2010
Cell:	Visit Count: 2
Work:	Total Spent: \$170.00
Email:	Loyalty Points: 0
	Default Kit:

1	Pedicure	meo meo	(S)11:45AM	\$25.00
---	----------	---------	------------	---------

Retail:	\$0.00	Tips:	\$0.00
Services:	\$25.00	Ticket Discount:	\$0.00
GiftCards:	\$0.00	SUBTOTAL:	\$25.00
Packages:	\$0.00	TAX:	\$0.00
		TOTAL:	\$25.00

Natural Nail Care Children Special Deluxe Manicure
 Gel / Silk Wrap Deluxe Pedicure French Manicure
 Acrylic Nails French Pedicure Hot Oil Manicure
 Facial / Paraffin kid manicure kid Pedicure
 Color Change Manicure Pedicure
 Waxing
 Design / Service
 Product

Void Ticket Discount Ticket Print Order Print Check No Sale Send
 Open Item Create Package Taxes/ Tips Next Appts Calc Pay Exit

Figure 33

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

Payment Screen

The screenshot displays the payment interface for a customer named 'cindy s'. The screen is divided into several sections:

- Customer Information:** Ticket #5, Customer Name: cindy s, Cust ID: 1, First Visit: 3/24/2010, Last Visit: 12/11/2010, Visit Count: 2, Total Spent: \$170.00, Loyalty Points: 0, Default Kit.
- Transaction Details:** 1 Pedicure meo meo (\$11:45AM) \$25.00
- Summary:** Retail: \$0.00, Services: \$25.00, GiftCards: \$0.00, Packages: \$0.00. Subtotal: \$25.00, Tax: \$0.00, Total: \$25.00.
- Payment Section:** Amount Due: \$25.00, Tender: 0. Buttons for Cash, Credit, Debit, Gift Card, and Check are visible. A numeric keypad is present. A green callout box highlights the 'TOTAL DUE \$25.00' button as '1. Tender button' and the 'Cash' button as '2. Payment button'.
- Bottom Bar:** Includes buttons for Void Ticket, Discount Ticket, Print Order, Print Check, No Sale, Send, Void, Activate Member Card, Activate/Print Gift Card, No Sale, Print Slip, Close Ticket, Print Receipt, and Exit. A green callout box highlights the 'Activate Member Card' and 'Activate/Print Gift Card' buttons as '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

Ticket #5

Customer Name: **Poppy Poppy**

Search New Edit Delete Package

Cust ID: 7	First Visit: 12/11/2010		
Phone:	Last Visit: 12/14/2010		
Cell:	Visit Count: 5		
Work:	Total Spent: \$158.00		
Email: azeestone@gmail.com	Loyalty Points: 0		
	Default Kit: Kit/Formula		

1	Pink White Full Set	jenifer Ga	(S)			\$45.00
---	---------------------	------------	-----	--	--	---------

Retail: \$0.00	Tips: \$0.00
Services: \$45.00	Ticket Discount: \$0.00
GiftCards: \$0.00	SUBTOTAL: \$45.00
Packages: \$0.00	TAX: \$0.00
	TOTAL: \$45.00

Void Ticket Discount Ticket Print Order Print Check No Sale Send

Open Item Create Package Taxes/Tips Next Appts Calc Pay

Show Menu Transfer Quantity Change Price Void Item Split Item Request Add/Remove Discount Redeem Points Commands

Be cung (\$45.00) Diep Diep (\$45.00)

jenifer Ga (\$45.00) kathy k (\$45.00)

MAI Tho (\$45.00) meo meo (\$45.00)

Nancy Tu (\$45.00) Nguoi Help (\$45.00)

sonny sonny (\$45.00) Thuy yeu (\$45.00)

Exit

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

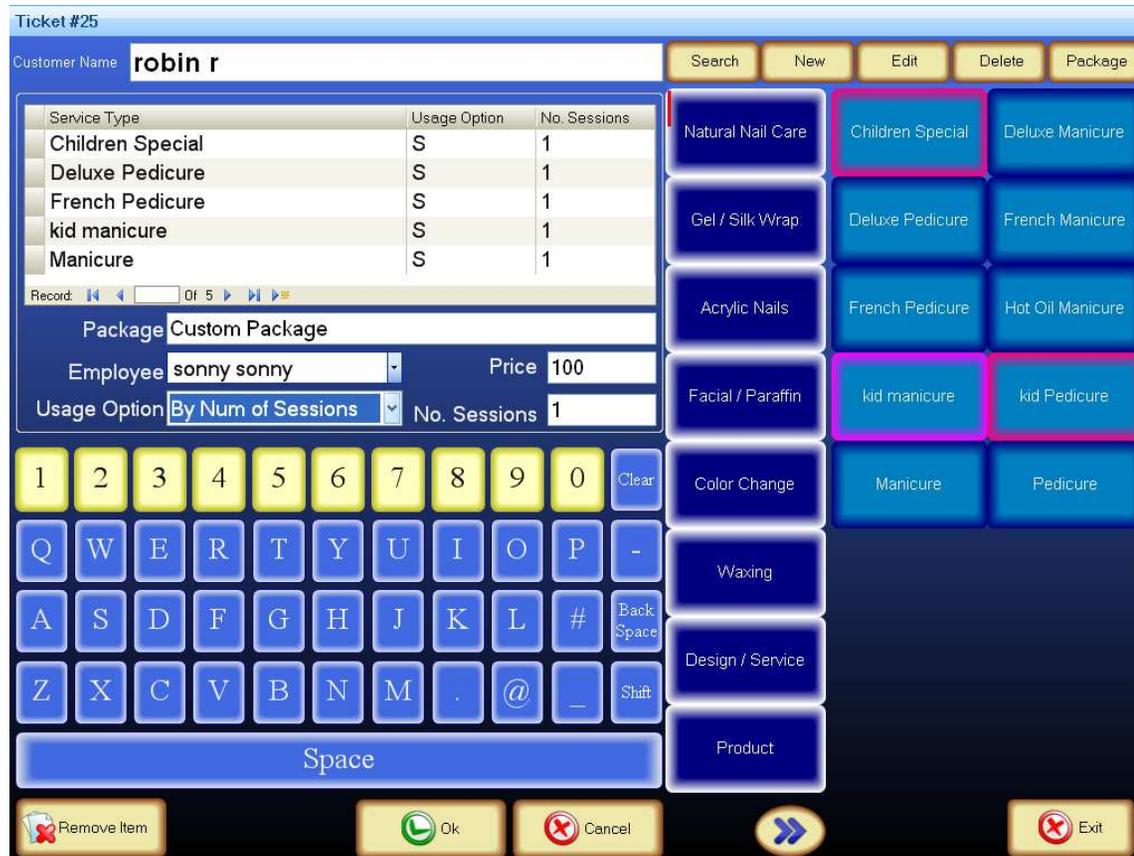


Figure 36

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

The screenshot displays the POS interface for Ticket #18. At the top, there are buttons for Search, New, Edit, Delete, and Package. Below this is a customer information section with fields for Customer Name, Cust ID, Phone, Cell, Work, and Email. A central area shows a list of items on the ticket, with one item highlighted: '1 Cut Down MAI Tho (S) 5:29PM \$3.00'. A green callout box points to this item with the text 'Item on Ticket'. To the right of the item list is a vertical 'Options Menu' with buttons for Show Menu, Transfer, Quantity, Change Price, Void Item, Split Item, Request, Add/Remove Discount, Redeem Points, Commands, and Set Service Time. A green callout box points to this menu with the text 'Options Menu'. At the bottom, there is a summary section with Retail, Services, GiftCards, Packages, Tips, Ticket Discount, SUBTOTAL, TAX, and TOTAL. Below the summary is a row of action buttons: Void Ticket, Discount Ticket, Print Order, Print Check, No Sale, and Send. At the very bottom, there are buttons for Open Item, Create Package, Taxes/Tips, Next Appts, Calc, Pay, and Exit.

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:

- 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.

- 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.