

Salon Technologies, Inc.



**for the
iPhone, iPod Touch & the iPad**

Version 5.0

USER GUIDE

Personal Salon Assistant User Guide

Technical Disclaimer: SalonTechnologies' formulas are for reference purposes only. The end result may vary. Therefore, formulas may need to be adjusted to each individual's specific hair type. These formulas are based on average hair texture and density. SalonTechnologies software is developed for the exclusive use of licensed cosmetologists only. A patch test is required before each application. SalonTechnologies software is to be used with your hair color company's educational hair color system.

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Chapter 1 - Getting Started

Chapter

1

Welcome to PSA: Salon your Personal Salon Assistant. PSA puts your business in the palm of your hand. PSA runs on an iPhone, iPod Touch and the iPad.

To better understand PSA, you are going to want to setup this application starting with the Settings App. Once you have entered all your settings, begin to enter your Clients by either importing from the device Contacts or adding each client manually through PSA.

PSA automatically puts your clients in the PSA Clients group on your device.

Backing Up & Restoring

➔ We strongly recommend that you backup your data to your desktop, Mac or laptop computer. Please follow the instructions for your iPhone , iPod Touch, or iPad regarding the backup of applications and data. For detailed explanation of how the backup works: <http://support.apple.com/kb/HT1766> .

CHECK YOUR ITUNES SETTINGS BEFORE CONNECTING YOUR DEVICE. YOU MUST HAVE SYNC APPS TURNED ON FOR PSA OR YOU WILL LOSE DATA!!!!

How to Back Up with iTunes

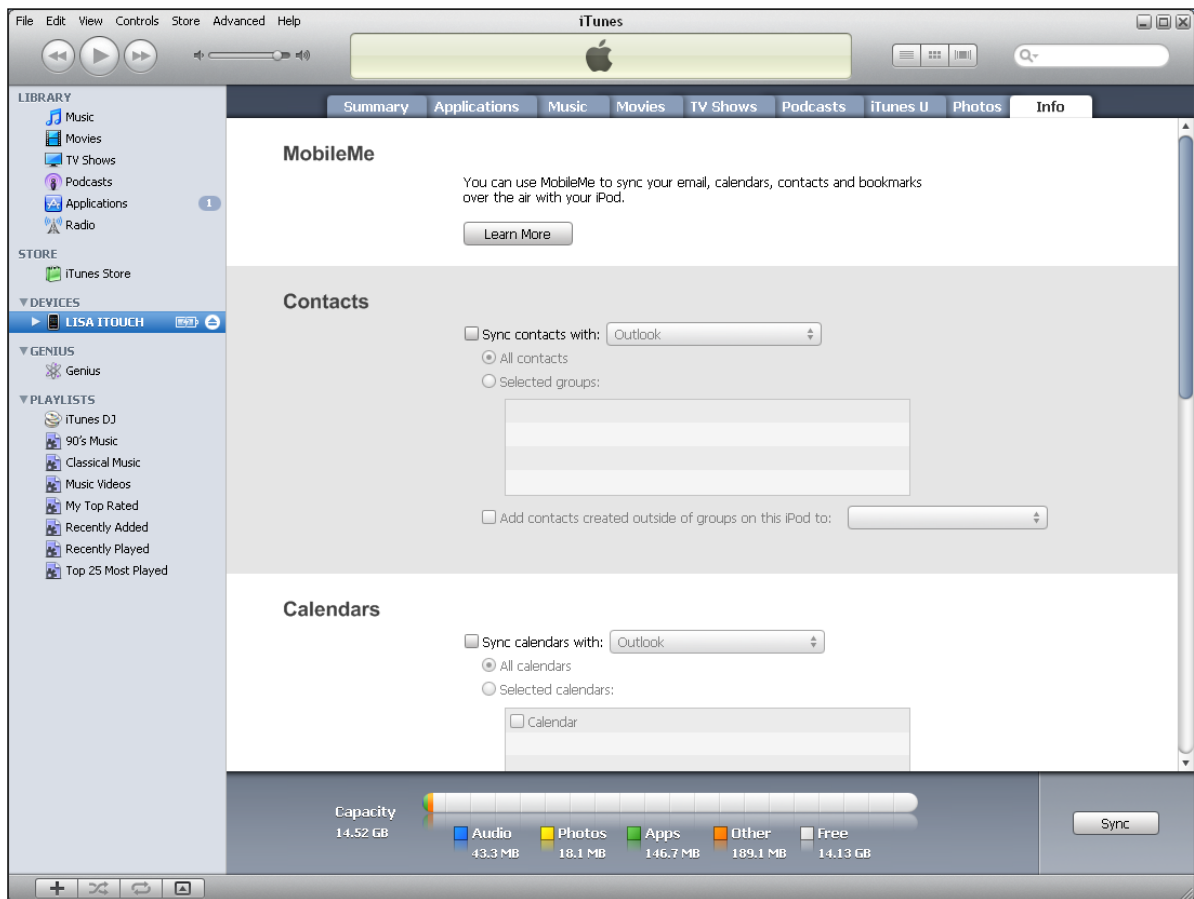
We also recommend that you connect your device to a computer and use the iTunes app built in features to Back Up and Restore your device. To run the Back Up program from iTunes:

Connect your device to a computer (Mac or Windows).

Open the iTunes desktop application. Note, if you are connecting your device to your computer for the 1st time, the iTunes application will automatically download to your computer after the new device hardware is automatically configured by your computer desktop/laptop.

In the left hand column in the iTunes desktop application, you should see your device name. **Right-click** on your device name under the DEVICES section.

A



small menu will appear after right-clicking your device with options to **Eject, Sync, Transfer Purchases, Back Up, Restore from Back Up.**

Select **Back Up** from this menu

When your device is properly backed up, you can be assured that you can also RESTORE from this backup you just took should you experience any problems with your device.

BACK UP AT LEAST ONCE EVERY DAY! YOUR BUSINESS IS ON THIS DEVICE!

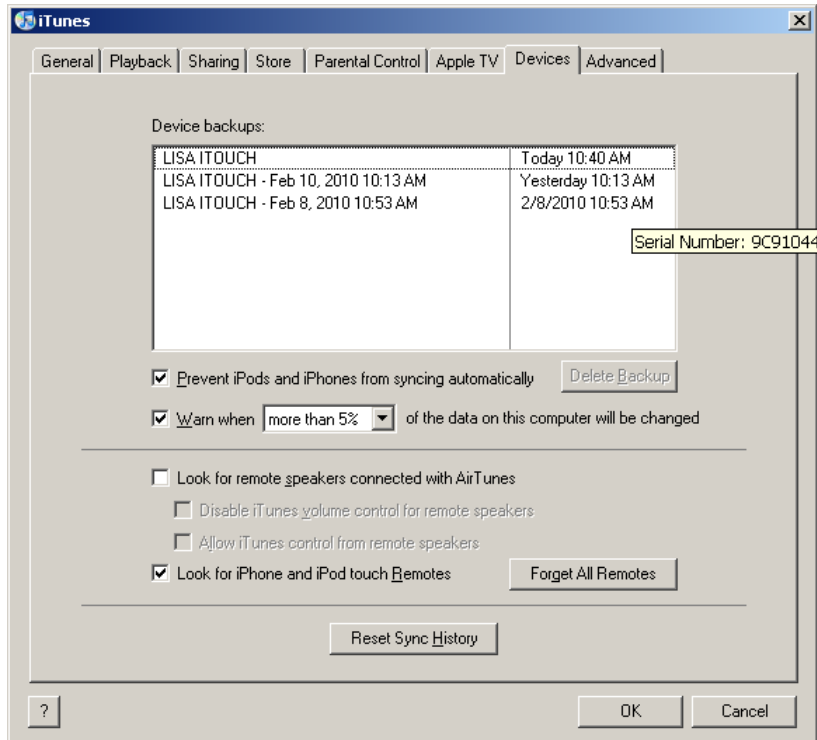
To be completely safe, after you Backup to your computer, copy the backup file to a Flash Drive and make sure it is date stamped. The Apple article mentioned will tell you where your backup file can be found on your computer.

How to Restore from a Backup Using iTunes

If you have been backing up your device daily, you should have no problem restoring from a previously taken back up should your device stop working properly. Restore with caution! It is important to pick the correct backup to restore from.

To See Your Available Back Ups → Select **EDIT** from top menu bar in iTunes, then select **PREFERENCES**. Tab to **DEVICES** screen. Device backups will display in the window provided.

Connect
your
device
to a



computer (Mac or Windows).

Open the iTunes desktop application

Right-click on your device name in left hand column and select **Restore From Backup** option. Normally, your device will only have one backup file stored on your computer to Restore from. If you put your backup files on a flash drive, you can restore from any date found in your backup by merely copying the backup file from your flash drive to the backup files directory as noted in the Apple article.

Starting the PSA Application

After purchasing **PSA: Personal Salon Assistant** from the iTunes App Store, the icon below will appear on your iPhone, iPod or iPad. Touch this icon to begin using your Personal Salon Assistant.



If you are using an **iPhone** or **iPod Touch**, your PSA Main Menu will appear as displayed to your left.

If you are using an **iPad**, your PSA Main Menu will appear similar as displayed below. The PSA Main Menu will display by touching the PSA Logo Icon.



PSA Main Support Menu

The PSA Main Support Menu displays some of the tools you will need to get help when you need it with your app purchase.

Contact Support

The Contact Support button is used to notify us with any problems with your PSA app. Notification is directly to our excellent Support Department. This menu also displays the version of the PSA application that you are using. This information is **CRITICAL** to provide to SalonTechnologies when contacting our Support Department. Also, please let us know the device you are using (iPhone, iPod or iPad) and the version number.



Registering as a PSA Customer

Also displayed on this screen is a button to transfer to the SalonTechnologies Website. In order to serve you better when you contact us, please take the time to register yourself as a customer. By registering as a PSA user, you will have the ability to receive special offers from SalonTechnologies, Inc.

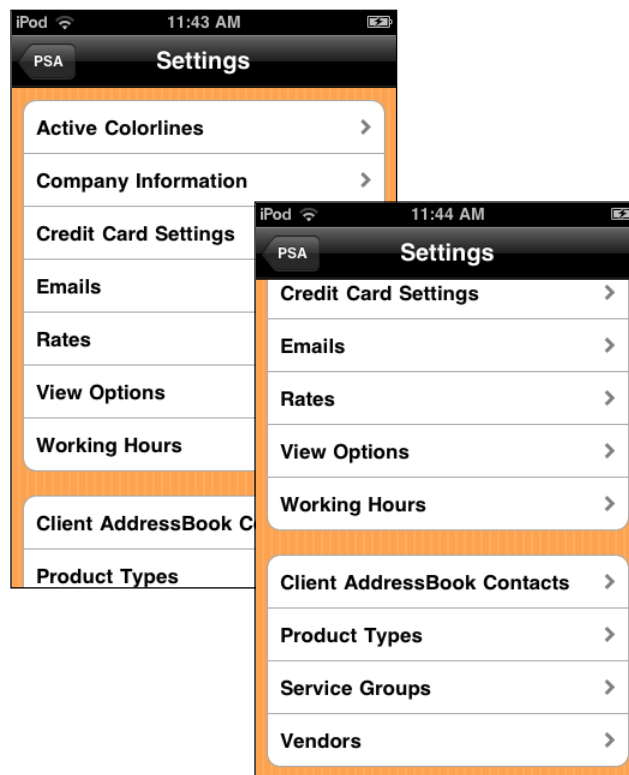
Chapter 2 - Settings

Chapter

2

The SETTINGS module of PSA allows you to customize the program according to your personal business. This is where you specify:

- Active Colorlines that you are using
- Your Company Information
- Credit Card Settings (optional)
- The wording/greeting for the reminder emails; Appointment, Birthday and Anniversary
- Your Commission Rates and Sales Tax Rate
- Viewing Options
- Your working hours & working days
- Customer AddressBook Contacts retrieval tool
- Product Types
- Service Groups
- Vendors



The screens above are the screens that display on an **iPhone** or an **iPod Touch**.

If you are using an **iPad**, your Settings Screen will appear as displayed below. Functionality of the options in Settings is the same for all devices; but, formatting of the screens is enhanced for the iPad.

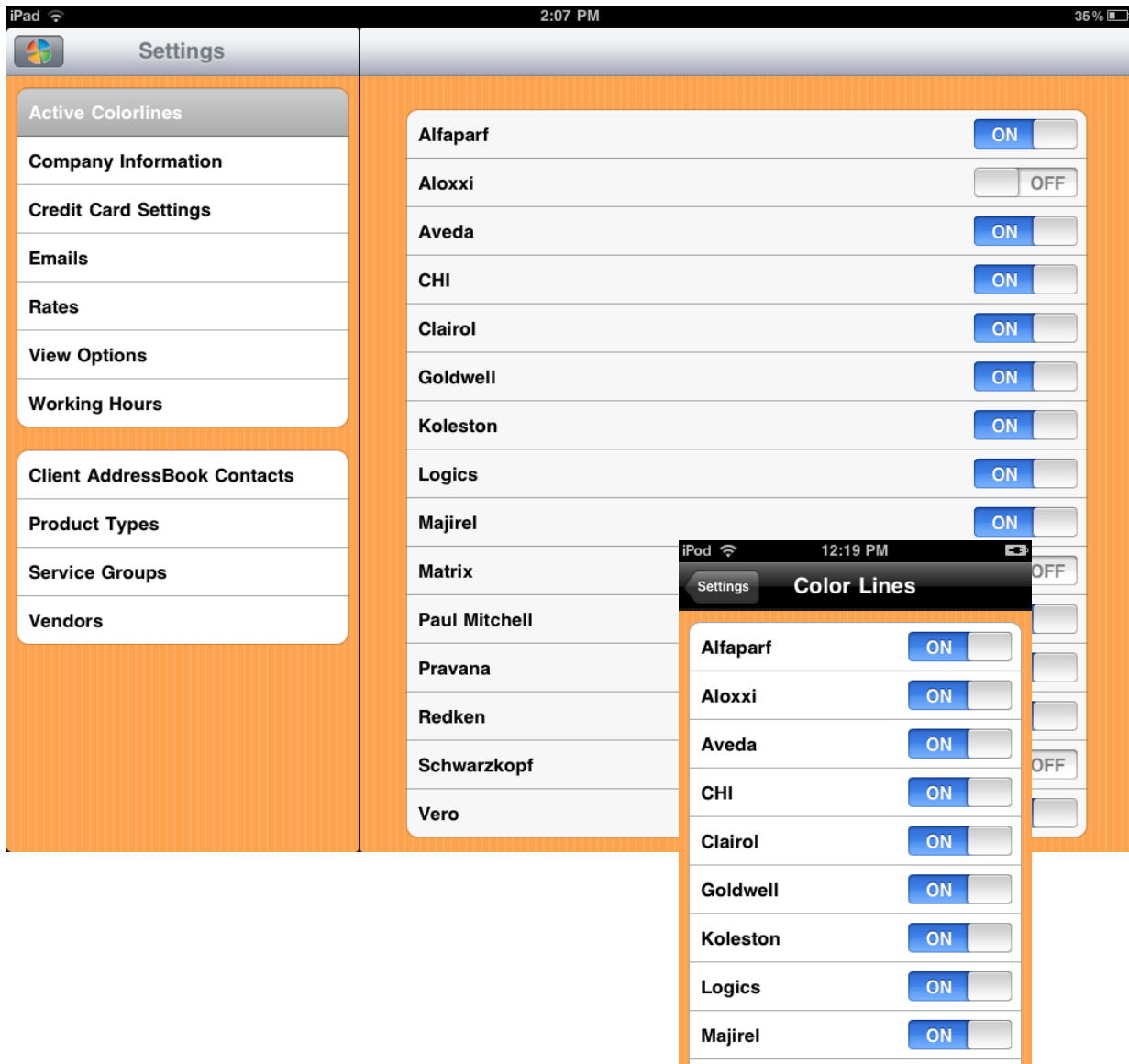
The screenshot shows an iPad interface with a status bar at the top displaying 'iPad', signal strength, '2:07 PM', and '35%' battery. The main header is 'Settings' with a 'Save' button in the top right. A left sidebar contains menu items: 'Active Colorlines', 'Company Information' (highlighted), 'Credit Card Settings', 'Emails', 'Rates', 'View Options', 'Working Hours', 'Client AddressBook Contacts', 'Product Types', 'Service Groups', and 'Vendors'. The main content area is titled 'Company Information' and contains the following fields:

Owner	Jack Beenimble
Company	Jack & Jill Hair Salon
Address	340 Fantasy Parkway
Address 2	
	Happyville NY 37732
Phone	(555) 555-5667
Fax	(555) 555-5668
Email	test@salontechnologies.com

Color Lines

The **Color Lines** screen will display after selecting **Active Colorline** from the **Settings** Screen. The Color Line section allows you to choose the specific companies whose color lines you use on your clients.

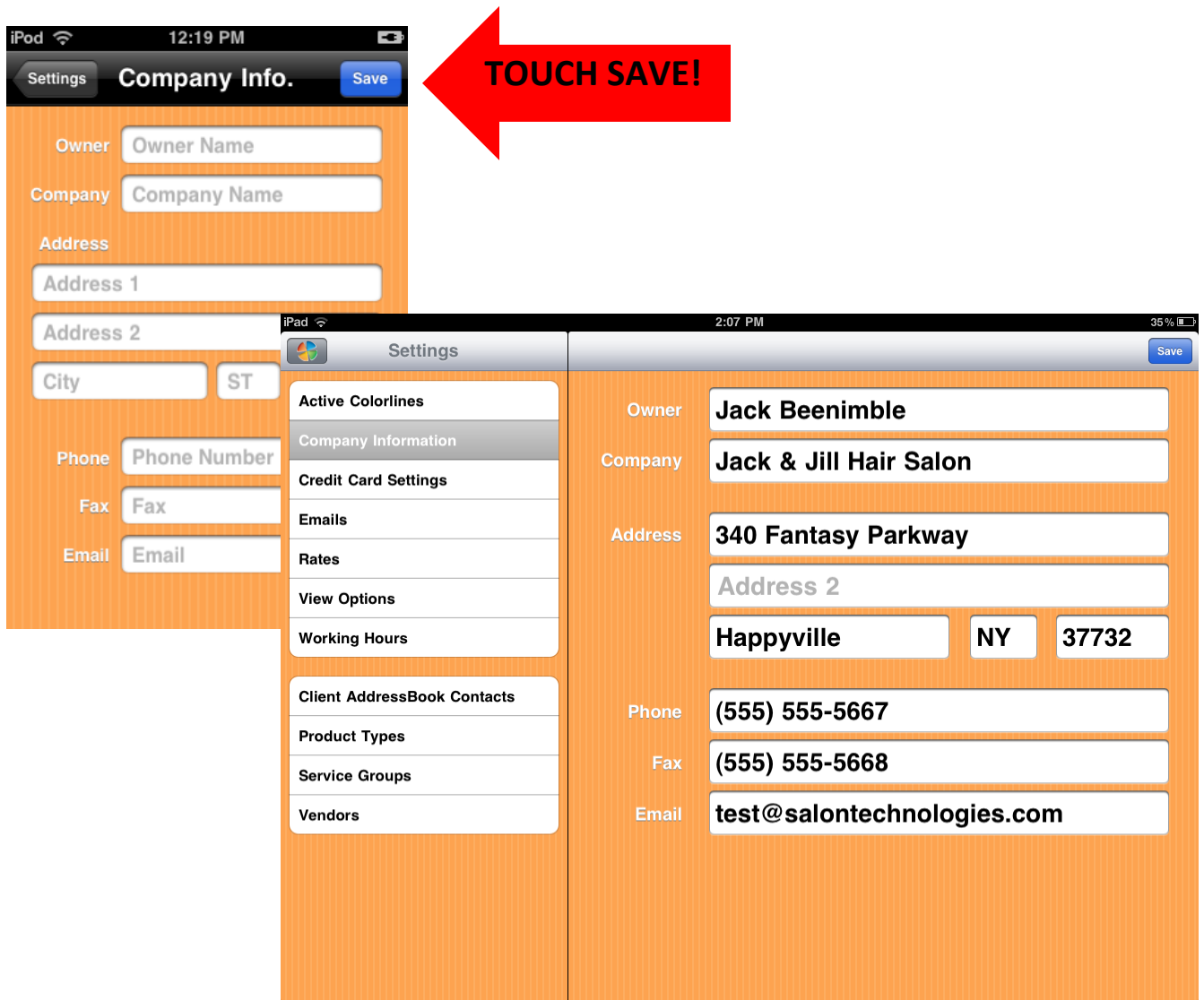
The larger screen is designed for the **iPad**; the smaller screen is designed for the **iPhone & iPod Touch**.



You may select one or more Colorlines as needed by touching OFF. When Color Line is selected, it will appear with the ON switch.

Company Information

The Company Info Screen will display after selecting Company Information from the Settings screen. Always touch SAVE after making any changes on this screen. This information will be used to create your Receipts and Report Headings.

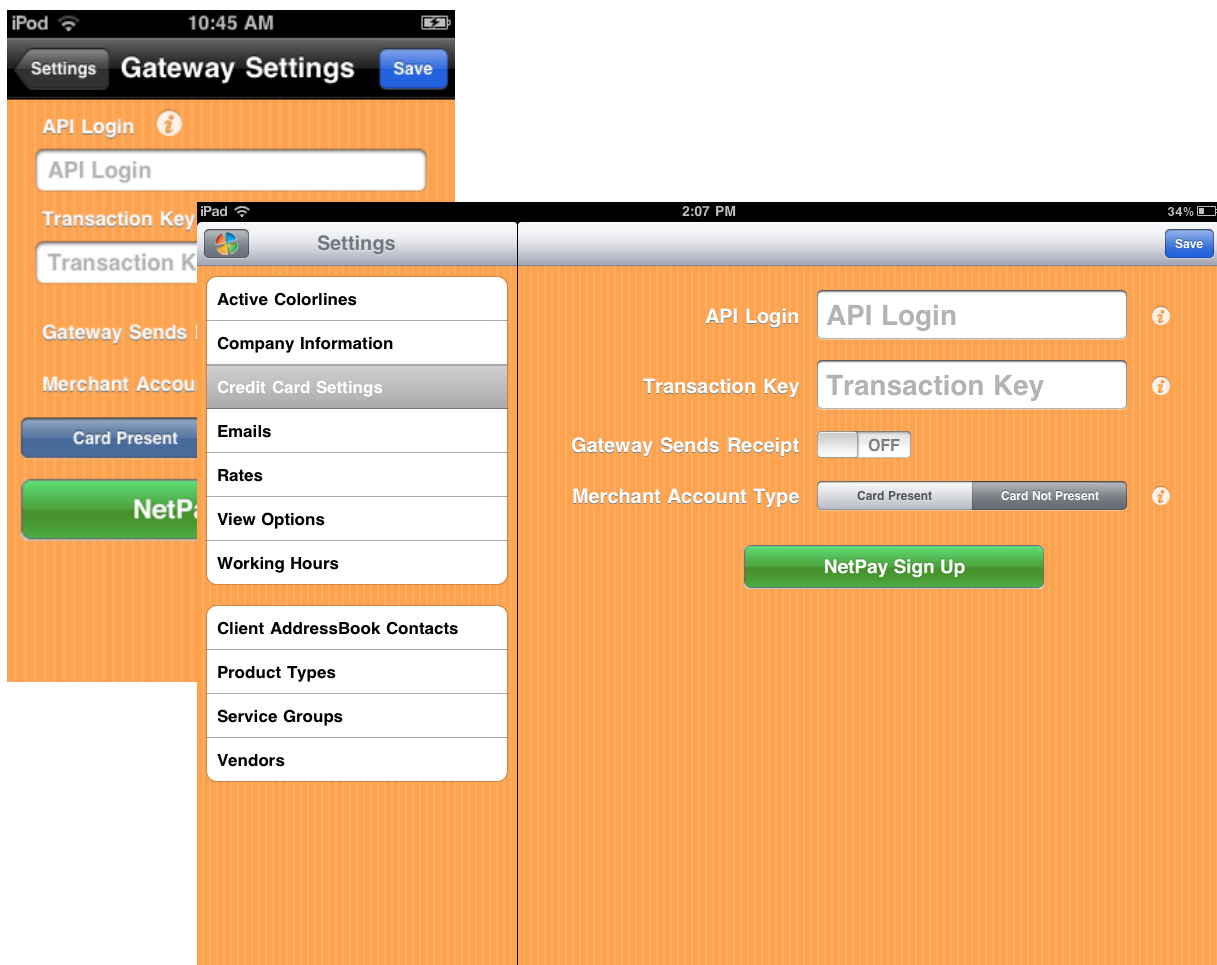


Owner	Your full name
Company Name	Name of your Salon or Company
Address 1 & 2	Enter address using 2 lines if needed
City	Your City
State	Your State Abbreviation
Phone	Your Phone Number
Fax	Your Fax Number
Email	Your Company's Email Address used for sending Reports to.

Credit Card Settings (optional)

The Gateway Settings Screen will display after selecting **Credit Card Settings** from the **Settings** main screen. This option is used to enter the necessary information for your credit card payment gateway. Before using this option, please read Chapter 10 about processing Credit Cards. You must apply online with NetPay or Authorize.Net to access the Credit Card Gateway.

NetPay is the preferred Vendor because there are NO SETUP FEES.



API Login	Provided by NetPay or Authorize.Net
Transaction Key	Provided by NetPay or Authorize.Net
Gateway Sends Receipt	<p>Optionally, you may have NetPay or Authorize.Net send receipts to your customer via their email address. Turn either ON or OFF by touching the Gateway Sends Receipts button.</p> <p>Note: The receipt will only show the charged amount, and not the products or services purchased.</p>
Merchant Account Type	<p>Card Present is a retail account if you're doing business where the customer directly hands you their card. If you have a hardware card stripe reader, this may be your merchant type.</p> <p>Card Not Present is typically for "MOTO" or internet transactions. If you also accept payment from a website, this may be your merchant type.</p>

Note: If you receive Errors #85 & #87, this indicates that your merchant type is incorrect.

Emailing Reminders

The Email option in Settings is used to setup or change the standard emails that are sent to your Clients for Anniversaries, Appointment Reminders and Birthdays. The CLIENTS module is used to send the email messages, but SETTINGS is used to do the initial setup of each email message.

PSA maintains these three standard email formats. The Email Screen allows you to choose which email standard message you would like to edit or change.

On all email standard formats, you may use the following fields to customize your own message if you would like:

<<CLIENT>>

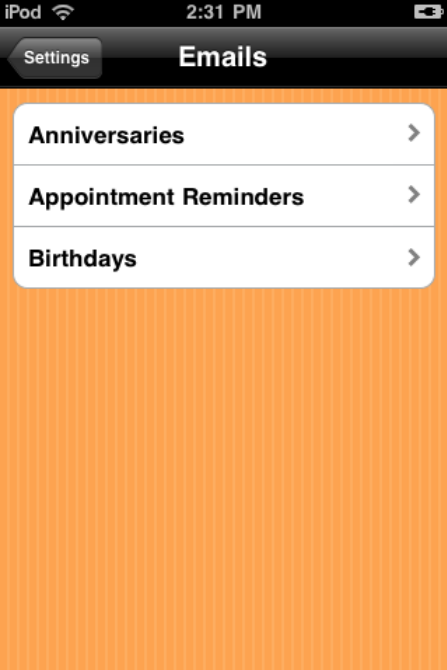
<<SERVICE>>

<<APPT-DATE>>

<<APPT-TIME>>

<<ANNIVERSARY>>

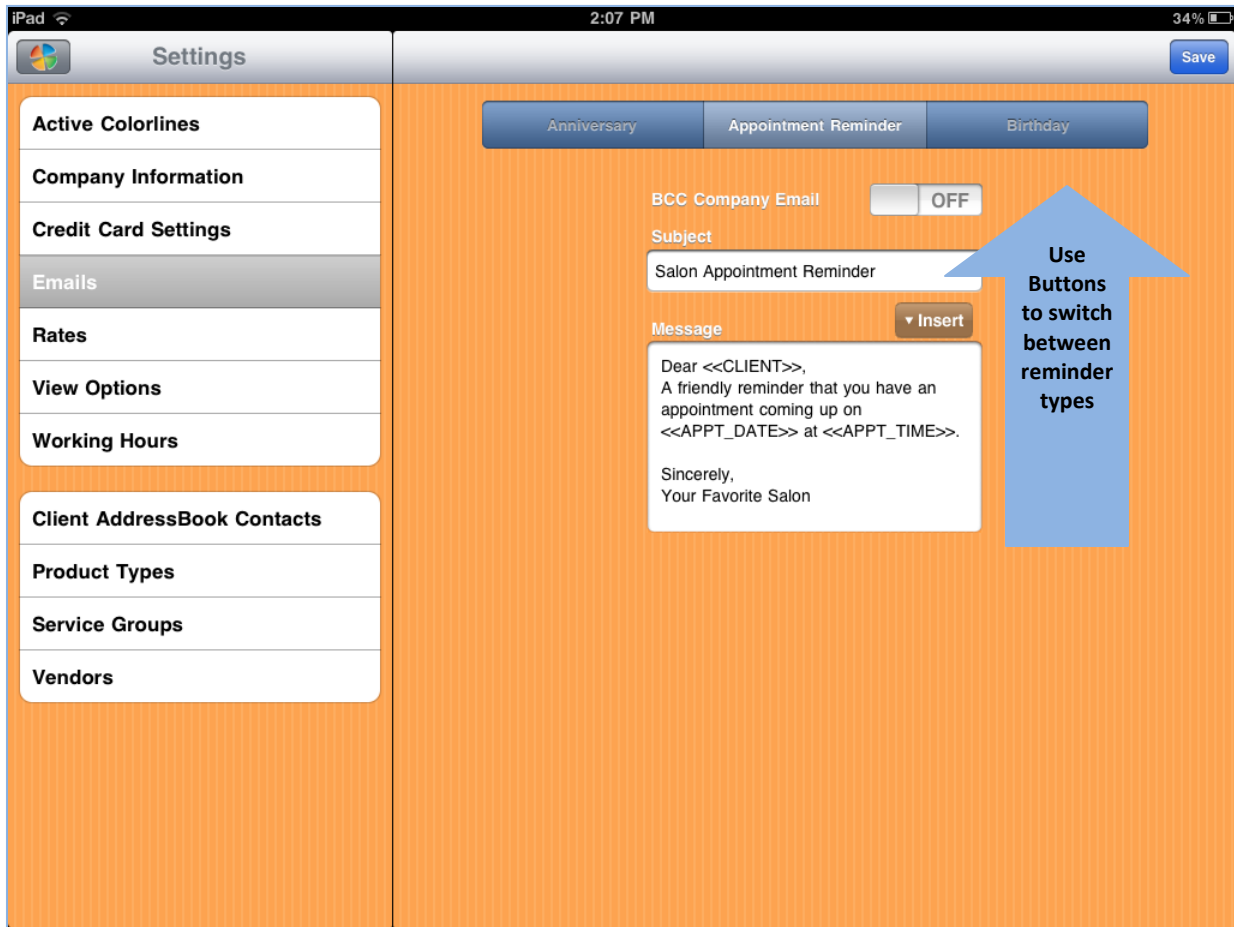
<<BIRTHDATE>>



All of the options noted above are available in each email message using the **INSERT button**.

Choose from: Anniversaries, Appointment Reminders and Birthdays by touching appropriate button.

iPad Email Reminders Screen



How to Email Anniversary Reminders

The Anniversary standard email message is below. The space <<CLIENT>> is used as a placement holder for your data. When you send out Anniversary emails, the Clients name is automatically inserted into the email where noted.

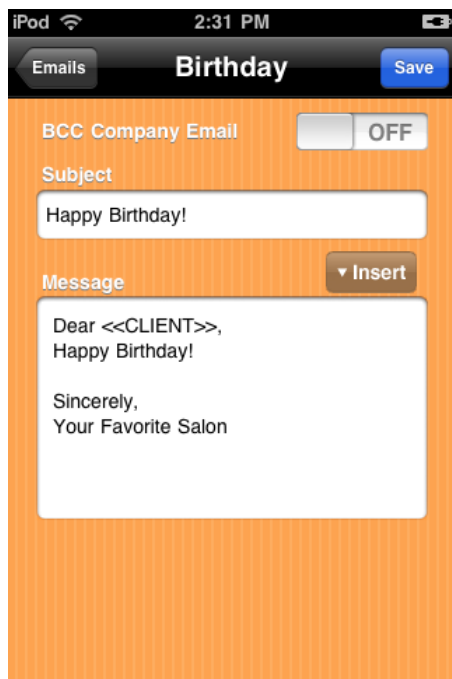
You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit and type away. If you accidentally remove <<CLIENT>>, you can re-insert it by using the INSERT button.



How to Email Birthdays Reminders

The Birthday standard email message is below. The space <<CLIENT>> is used as a placement holder for your data. When you send out Birthday emails, the Clients name is automatically inserted into the email where noted.

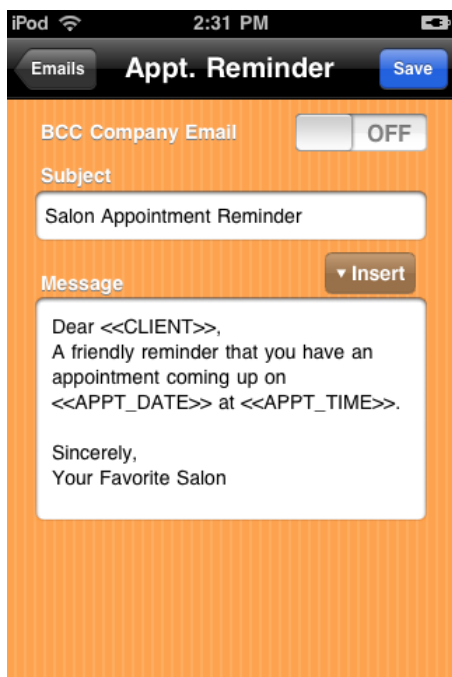
You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit and type away. If you accidentally remove <<CLIENT>>, you can re-insert it by using the INSERT button.



How to Email Appointment Reminders

The Appointment Reminders standard email message is below. The space <<CLIENT>> is used as a placement holder for your data. When you send out Birthday emails, the Clients name is automatically inserted into the email where noted.

You may change this email message as often as you wish or customize it for your business. Simply touch area of email to edit and type away. If you accidentally remove <<CLIENT>>, you can re-insert it by using the INSERT button.

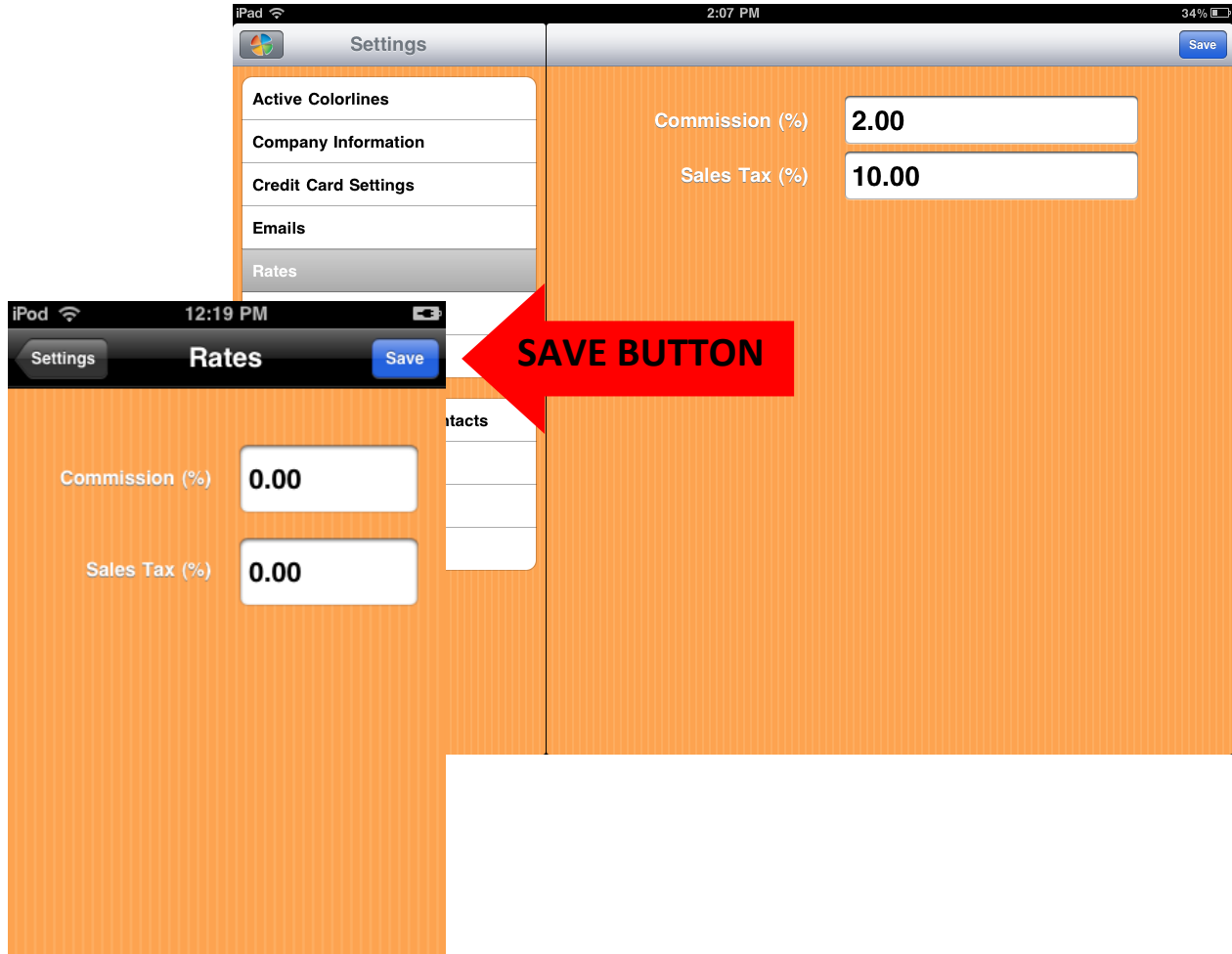


The screenshot shows an iPod/iPhone interface for editing an email. At the top, it says "iPod" with signal and battery icons, and the time "2:31 PM". Below that is a navigation bar with "Emails" on the left, "Appt. Reminder" in the center, and a blue "Save" button on the right. The main content area has an orange background. It includes a "BCC Company Email" section with a toggle switch set to "OFF". Below that is a "Subject" field containing "Salon Appointment Reminder". The "Message" field contains the text: "Dear <<CLIENT>>," "A friendly reminder that you have an appointment coming up on <<APPT_DATE>> at <<APPT_TIME>>." "Sincerely," "Your Favorite Salon". To the right of the message field is a brown "Insert" button with a downward arrow.



Rates

The Rates screen will display after selecting **Rates** from the **Company Info** screen.



<p>Commission (%)</p>	<p>The commission rate indicates the percentage of sales to be considered income. The commission rate is utilized in the reports section of PSA.</p>
<p>Sales Tax (%)</p>	<p>Indicate the percentage of sales tax to charge on taxable Products/Services</p>

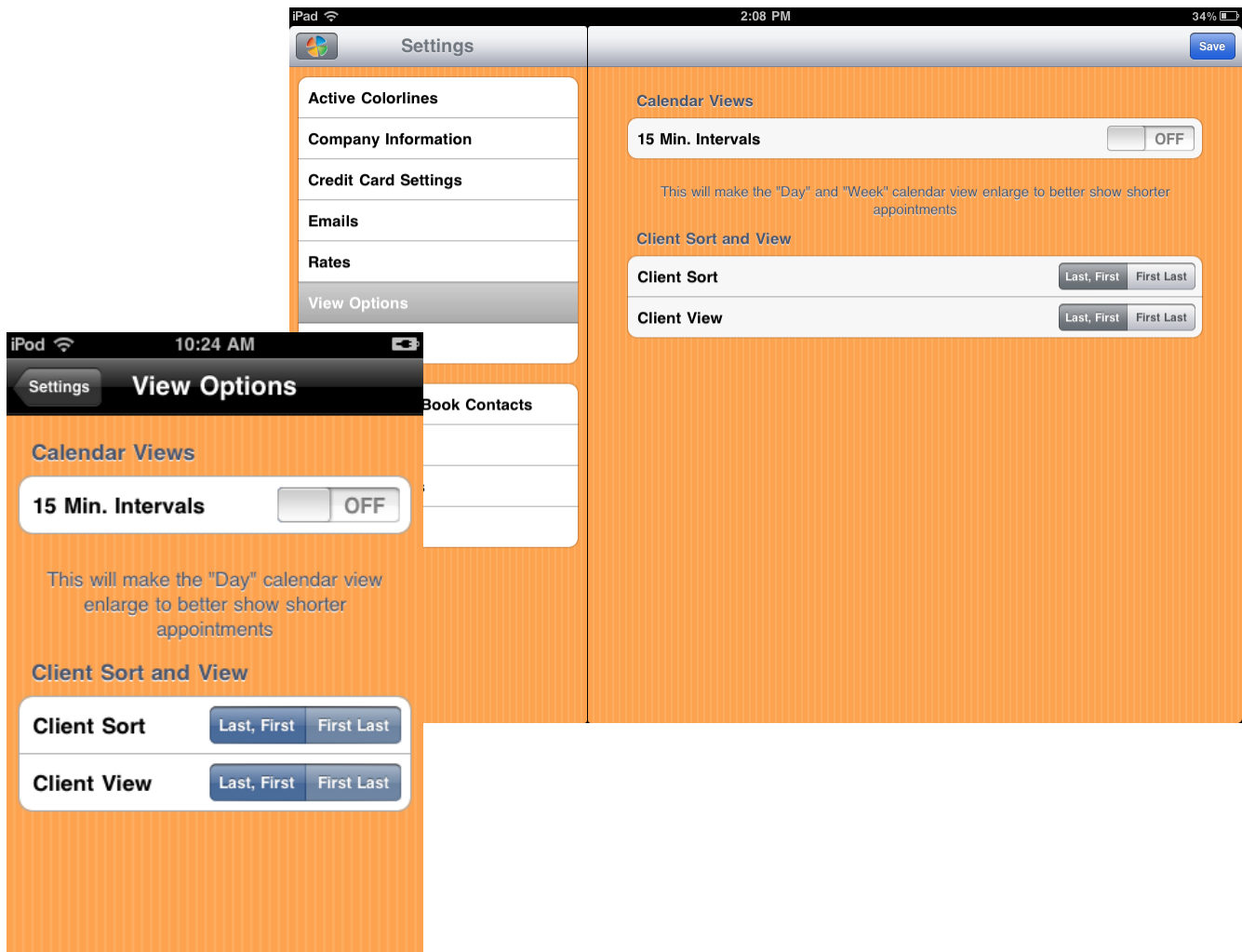
Note: Commission & Sales Tax Rates are optional

View Options

The View Options screen allows you to decide how your schedule will look. The first option here is Calendar Views. Your Calendar can display in 30 minute intervals or 15 minute intervals. To have 15 minute intervals, touch OFF to ON.

Also, you can display how you want your Clients names to appear in the Client module. You have the choice to sort by Last Name, First Name or First Name, Last Name.

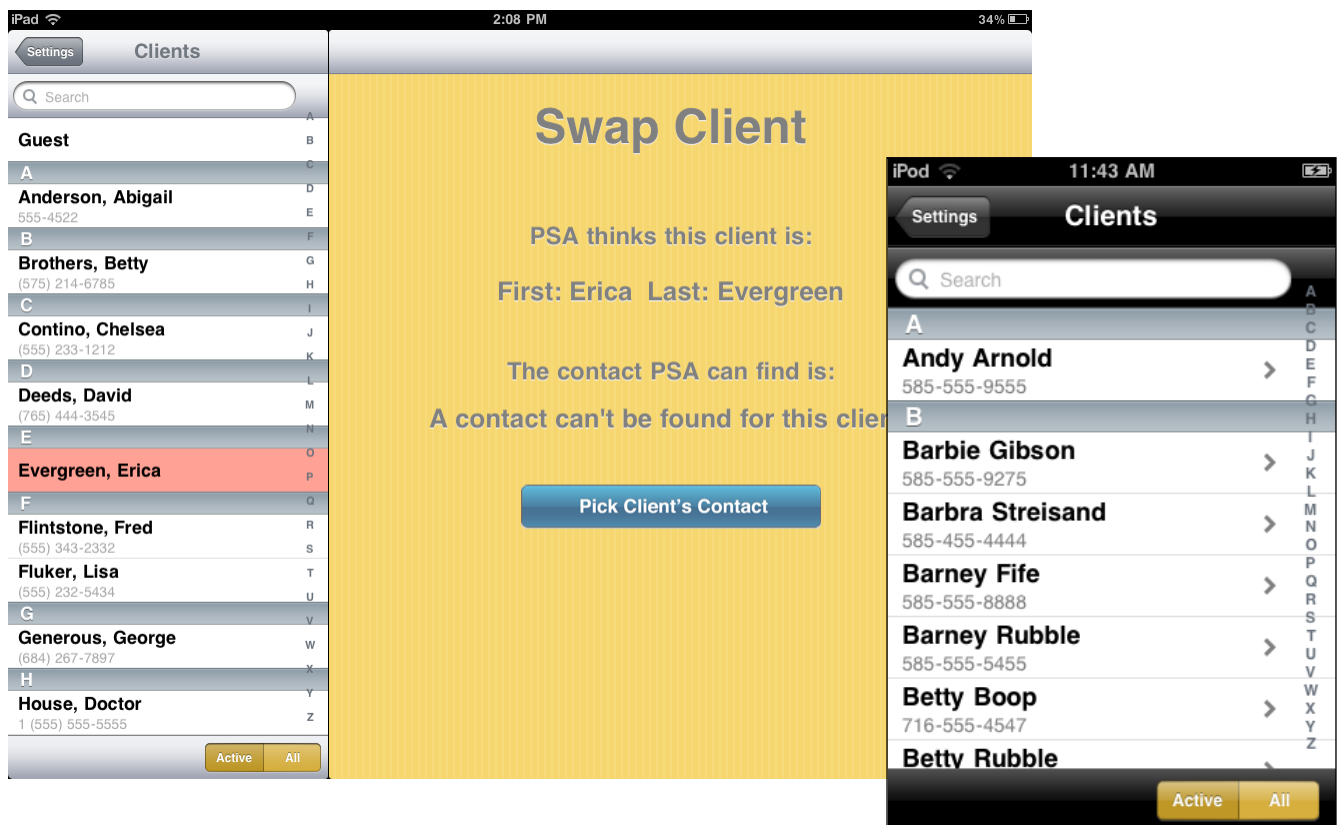
You may also choose how to view Clients. You may view clients by Last Name, First Name or First Name/Last Name.



Client Address Book Contacts

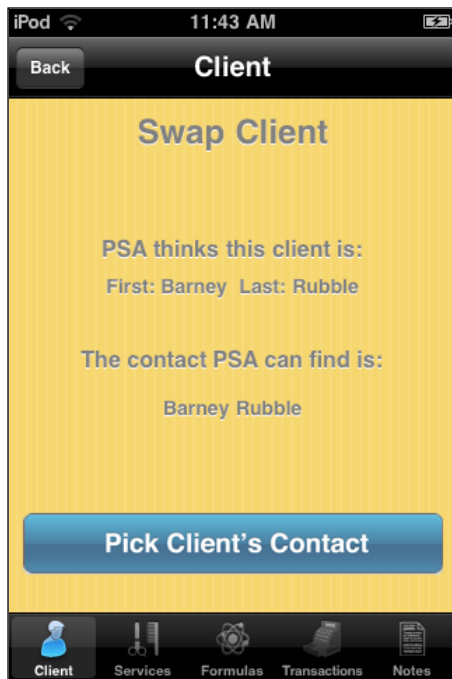
The Client Address Book Contacts option in Settings allows you to switch the address book contact for a Client. **This utility should only be used to fix mismatches in your PSA Clients group.**

Before using this option, try to use the Automatic Recovery & Manual Recovery options first.



If you have a Client in PSA that has a history of Services, Appointments, Formulations, etc. and the Client does NOT match the history.

After you have chosen your Client, use the screen below to pick the correct Client to associate the PSA data with.



← Note, the Client that PSA thinks it belongs to, and the contact PSA can find.

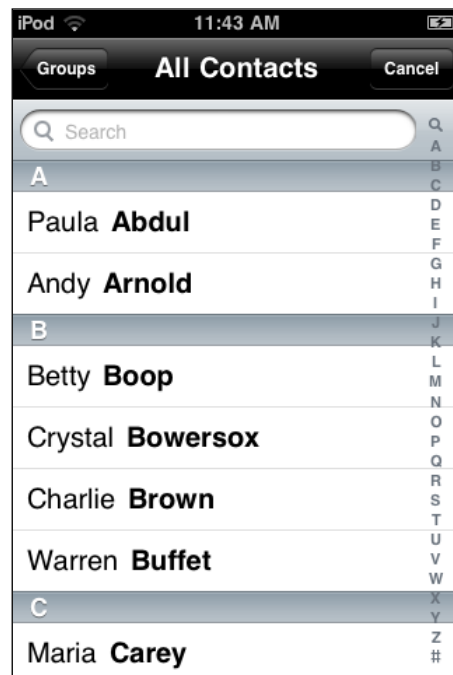
← Touch the BLUE button to pick a new Client for this history.

Your device's main CONTACTS are now displayed.

Choose the Client that you want associated with the history from the first Client you selected. If the Client does NOT appear here, you must add them into your device Contacts and then import into PSA.

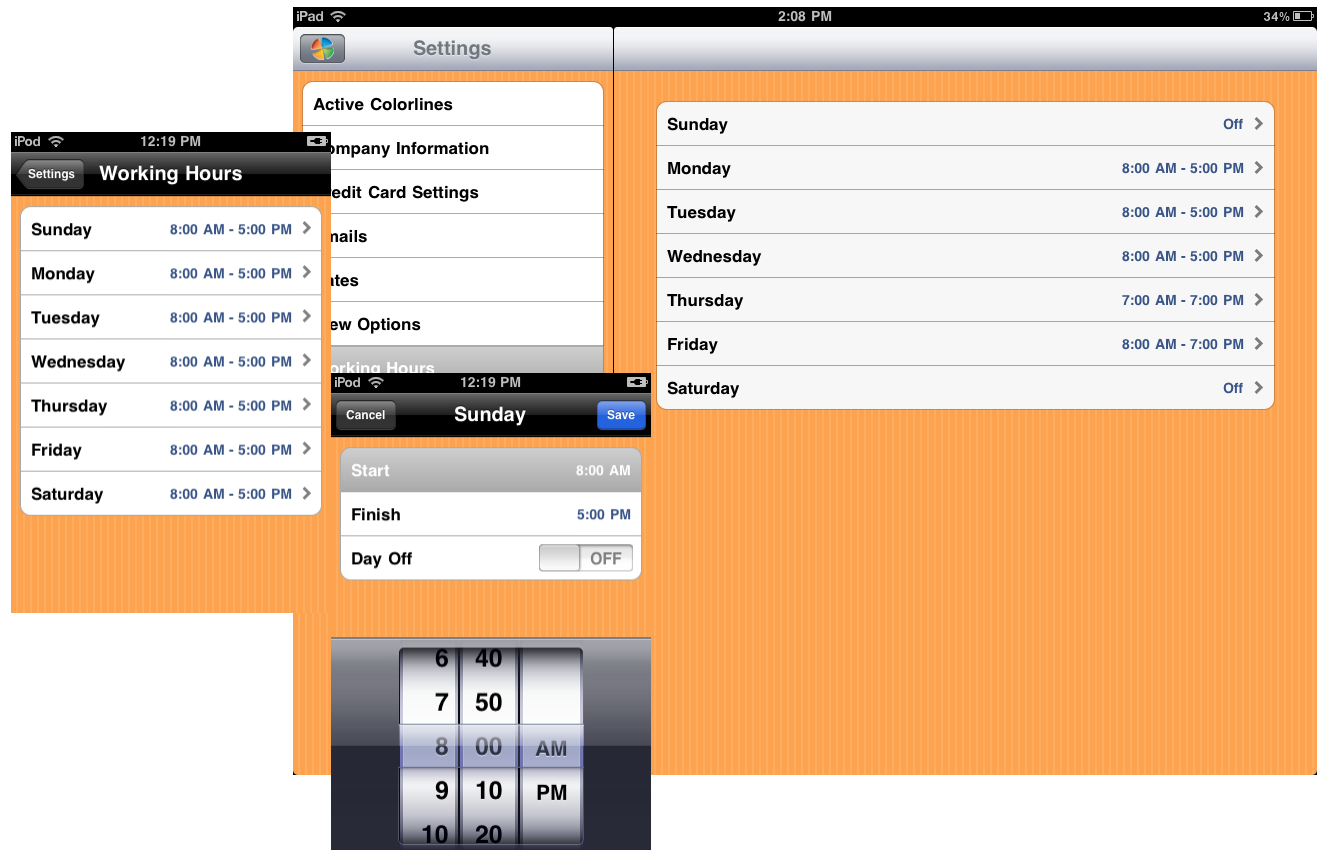
If an error appears, correct the condition and try to re-associate the Client again.

Note: This utility should only be used as a LAST RESORT. The Automatic Recovery & Manual Recovery should be tried before using this option.



Working Hours

The Working Hours screen is used to tell the program what your “normal” scheduled hours are for your business. This screen lists each day of the week as well as your starting time and ending time. The app defaults to all days of the week as working days.

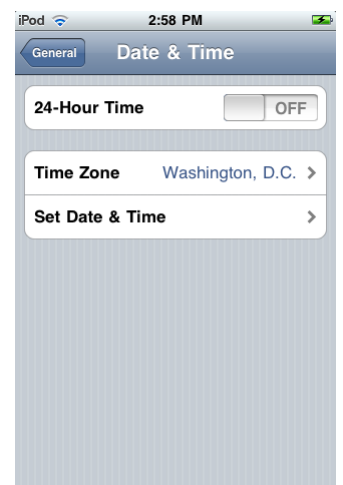


To change your work days and/or times, touch the day that you would like to change and the second screen above will display for you to update the Start & Finish times.

Start	Enter the time that you begin your working day
Finish	Enter the time that you end your working day
Day Off	Used to indicate that you do NOT work on this weekday at all.

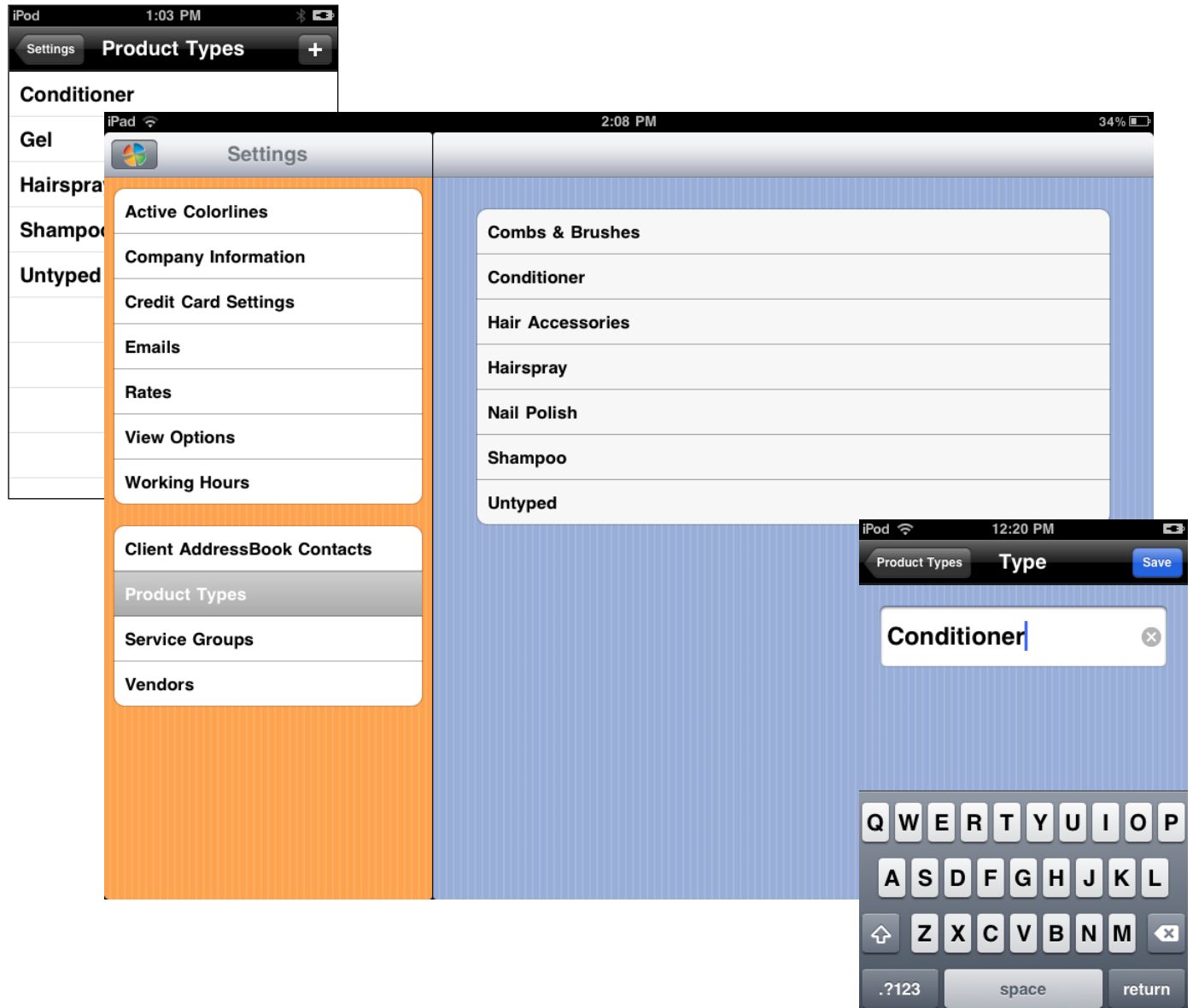
IMPORTANT

Note: On your device in **General Settings**, please set **24-Hour Time** to **OFF** otherwise all your times will appear in military time format instead of AM, PM format.



Product Types

Product Types are a way of organizing the products that you sell for quick retrieval when cashing out your customer in the Register function of PSA. You must set up Product Types prior to adding Products to your PSA.



To **ADD** a product type, touch the “+” sign and enter the PRODUCT TYPE on the screen provided.

Use the **UNTYPED** product type only for products not needing classification.

*** Note: If you delete a product type, any products that were of that type will become 'UNTYPED'*

Service Groups

Services refer to the beauty care services you provide your clients, while SERVICE GROUPS are the categories to which these services belong. For example, a manicure and pedicure service may belong to the Nail service group, while a Cut/Foil/Color service belong to the Hair service group.

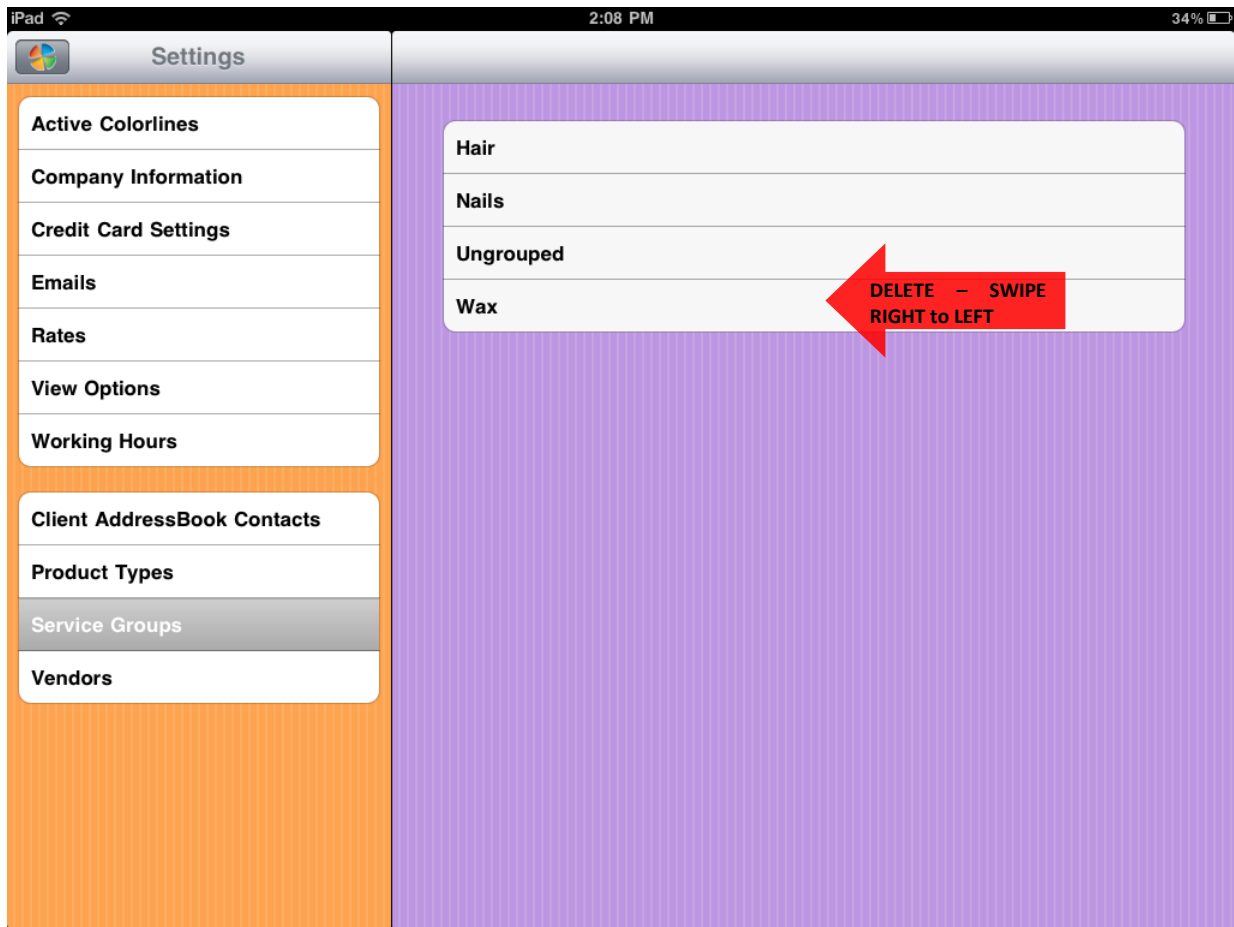
Placing services in groups allows you to monitor sales and statistics by groups instead of individual services. Your system automatically comes with Hair, Nails, Wax and an Ungrouped Service Groups. Only use the UNGROUPED service group or services that you do NOT want to classify.

To **ADD** a Service Group → touch the “+” sign, then enter the Service Group Name in place provided.

To **DELETE** a Service Group → swipe the service group from right to left. The DELETE icon will display. Touch DELETE to permanently remove this service group. Any Services in this Service Group will have their service group reset to UNGROUPED.



The iPad Service Groups option is very similar to the iPhone/iPod screen:



Note: If you delete a Service Group, all services in that group will be placed into group: UNGROUPED.

Note: The Service Group UNGROUPED cannot be deleted.

Vendors

Optionally, you may enter Vendors for the Products that you sell in your business. We recommend that you enter Vendors for all your Products for reporting purposes.

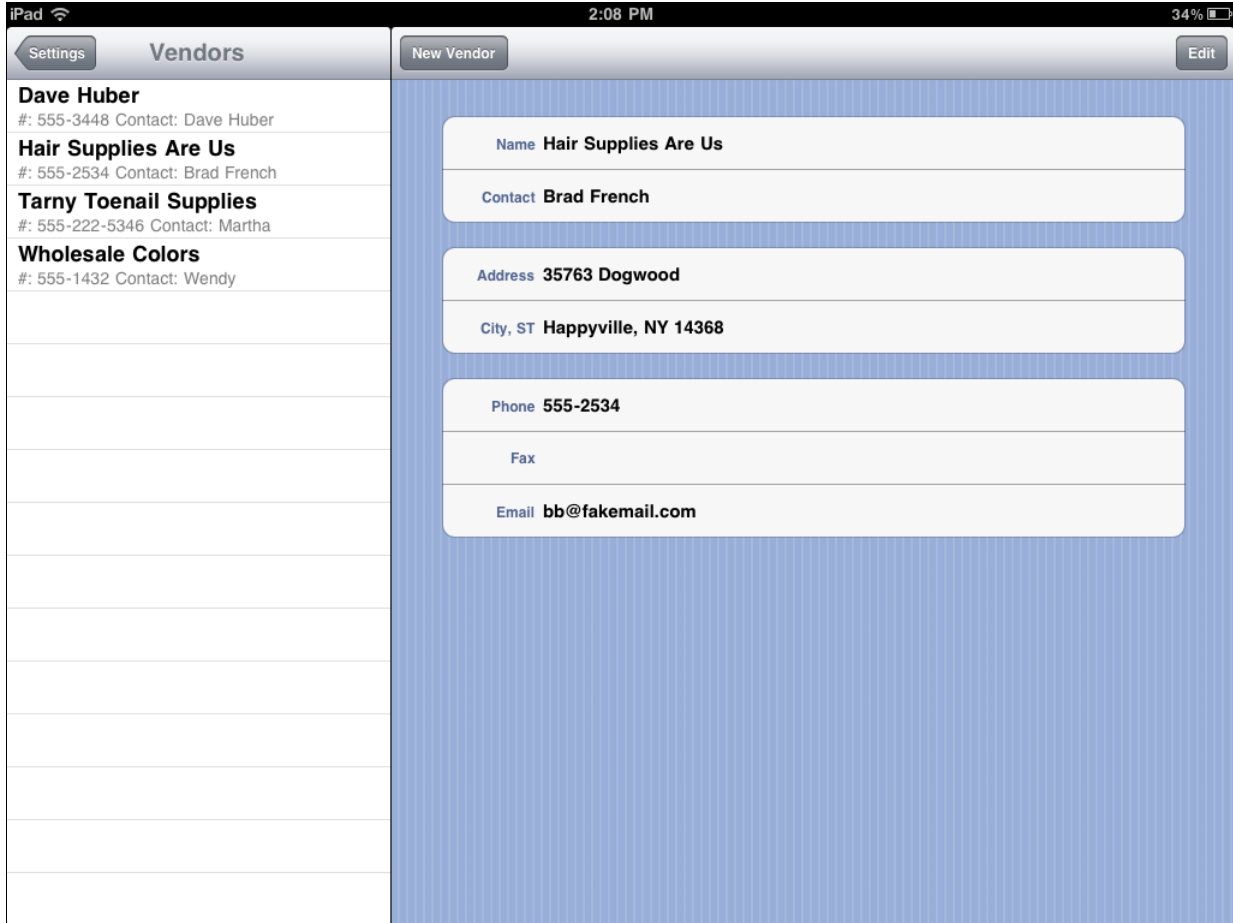
The screenshot shows a mobile application interface for adding a vendor. At the top, there's a status bar with 'iPod', signal strength, '12:20 PM', and battery level. Below that is a navigation bar with 'Cancel' on the left, 'Vendor' in the center, and 'Save' on the right. The main form area has a blue background and contains the following fields:

- Name:** A text input field with the placeholder 'Vendor Name'.
- Contact:** A text input field with the placeholder 'Vendor Contact'.
- Address:** Two stacked text input fields labeled 'Address 1' and 'Address 2'.
- City:** A text input field.
- ST:** A dropdown menu for state selection.
- Zip:** A text input field.
- Phone:** A text input field with the placeholder 'Phone'.
- Fax:** A text input field with the placeholder 'Fax'.
- Email:** A text input field with the placeholder 'Email'.

 A large red arrow points from the right towards the 'Save' button, with the word 'SAVE' written in black text inside the arrow's shaft.

Vendor Name	Required. The name of the vendor.
Vendor Contact	Person at your Vendor that you contact the most.
Address 1 & 2	Address of your vendor. Use second address line when needed
City	City where Vendor does business.
State	State where Vendor does business.
Zip code	Zip code of Vendor
Phone	Vendor Phone Number

The iPad Vendor Entry Screen is very similar to the iPhone/iPod version of PSA:



Chapter 3 - Clients

Chapter

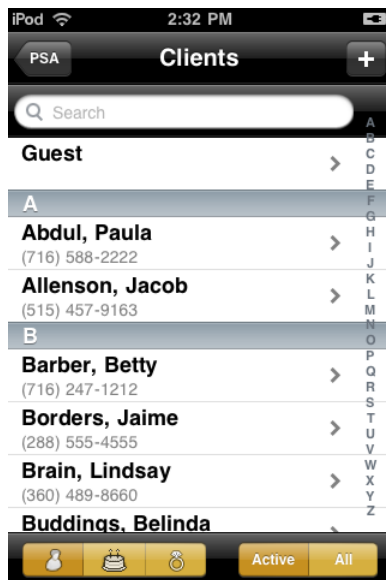
3

The CLIENTS application allows you to keep all details of every client in one convenient place. Your software stores client's contact information, their history of appointments and services, formula records, and also allows you to enter additional notes to help personalize your business with each client.

It is important to note that your PSA Clients will automatically be placed into the PSA Clients Group when you add a Client through the PSA Client App. For those with Contacts already defined, a convenient IMPORT option is available to make a current Contact a PSA Client.

On rare occasions, PSA might not be able to identify a contact for a Client it previously knew. For these situations, we have created methods for manually or automatically recovering the Address Book Contact. Without the contact, certain information may not be available such as birthday or email address.

The Clients application now allows you to send out Appointment Reminders, Happy Birthday emails, and Happy Anniversary emails.



Overview

From the **CLIENTS MAIN** screen, you may proceed to add, edit or delete Clients as needed. You may also search for a Client by entering all or part of the Clients Last or First Name in the search area provided.

Deleting Clients

If you want to delete a client, please delete from your Clients List in PSA before deleting from your devices main contacts app. As shown below, swipe the Client from right to left until a delete button appears. Then touch the delete button and the Client becomes “Inactive”.

ALWAYS DELETE A CLIENT FROM PSA BEFORE DELETING FROM YOUR DEVICE’S MAIN CONTACTS APP!

When you delete a Client in PSA, the Client STAYS in your system but is now considered “INACTIVE”. You may view these clients by selecting the **ALL view** button from the Clients app.

By default, this screen will always display **ACTIVE Clients** unless you change view to see **ALL**.

The screenshot shows the PSA Clients app interface on an iPod. At the top, there is a search bar and a '+ ADD CLIENT' button. Below the search bar, a list of clients is displayed, including 'Guest', 'Abdul, Paula', 'Allenson, Jacob', 'Barber, Betty', 'Borders, Jaime', 'Brain, Lindsay', and 'Buddings, Belinda'. A red arrow points to the 'Barber, Betty' entry, indicating that swiping from right to left reveals a red 'DELETE' button. At the bottom of the screen, there are three view buttons: 'Appointment, Birthday and Anniversary Email Reminders' (with a person icon), 'Active' (with a calendar icon), and 'All' (with a ring icon). A blue arrow points to the 'All' button, explaining that it displays all clients, both active and deleted. Another blue arrow points to the 'Active' button, explaining that it shows active clients only.

ADD CLIENT

DELETE

Swipe Client you want to delete from RIGHT to LEFT until you see the DELETE button.

ACTIVE – shows active clients only

ALL – displays all clients; active and deleted.

Appointment, Birthday and Anniversary Email Reminders

Adding a Client

After selecting '+' from the Clients main screen, the screen below will display.

iPhone & iPod Touch Screen

iPad Enhanced Screen

Return to Clients Listing

IMPORT from Main Contacts

Add a New Client

Appointment, Birthday and Anniversary Email Reminders

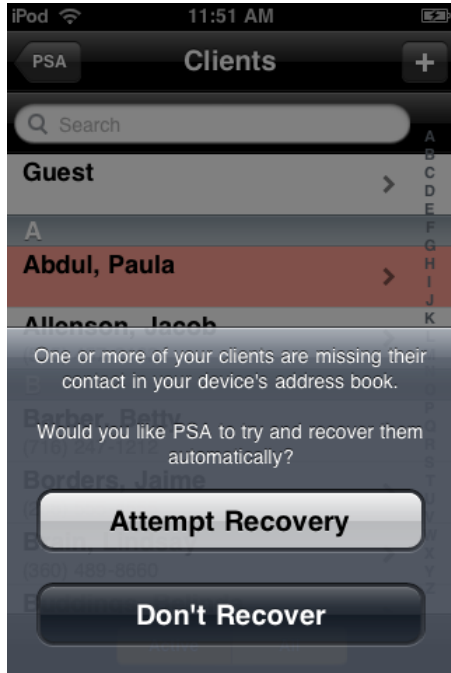
ADD CLIENT

CLIENT HISTORY

Edit

Manual & Automatic Recovery

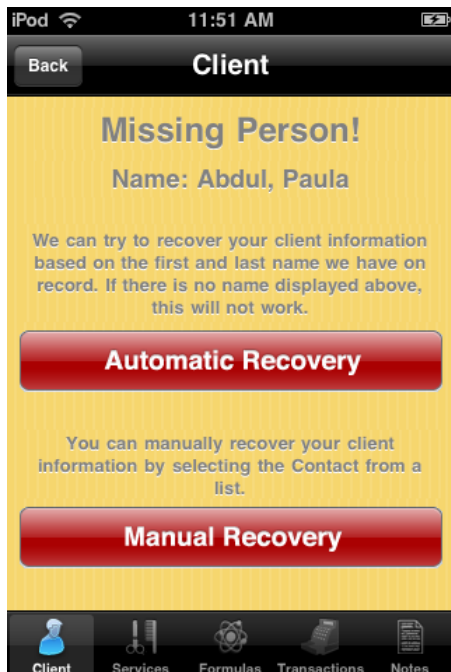
You may experience an issue in which the PSA can't find the contact it once knew. This may happen if you restore your device, replace all of your contacts during a sync, or other times when syncing with MobileMe.



If you see this screen when you go into the CLIENTS app, one or more of your Contacts is unrecognized within PSA. This Client's name will appear at the top of the screen.

Most id errors can be corrected automatically by using **Automatic Recovery** option. The recovery option will attempt to match your PSA Clients with clients in your devices Contacts by First Name and Last Name. If you have duplicates in your main device Contact address book, you will have to manually indicate which client is the PSA Client.

You can ignore this error by pressing **'Don't Recover'**, and continue to do your work until you have the time to fix this condition. This message will only display once during your session. When you close PSA and reopen PSA, the recovery options will display again.



** Note: In the screen above, the Client that needs to be recovered is shaded in Red/Pink.

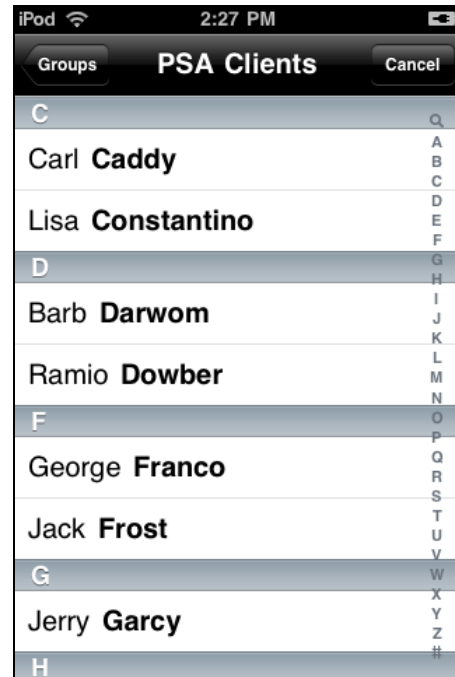
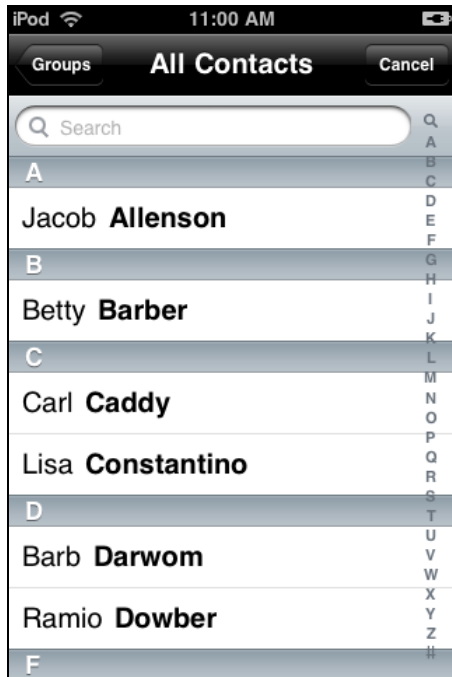
This screen actually indicates the Client that is missing. If you accidentally deleted this Client from the devices main Contacts address book, you will need to create this particular Client in the device Contact app. Once you have done this, use the Manual Recovery to point to the newly entered Client.



This screen appears if the Automatic Recovery Option has **failed**. Follow the directions on the screen and locate the Client that will be shaded in Red.

Importing Clients

After selecting to IMPORT a client from the previous screen, the screen below will display. This is your devices CONTACTS application screen.



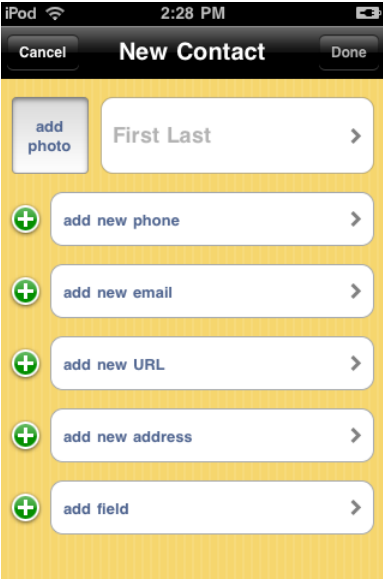
To SELECT a client for importing into PSA → Touch the Client and the Client will automatically have it's data transferred into the PSA app.

To change which GROUP displays → Touch GROUPS in left hand corner of screen.

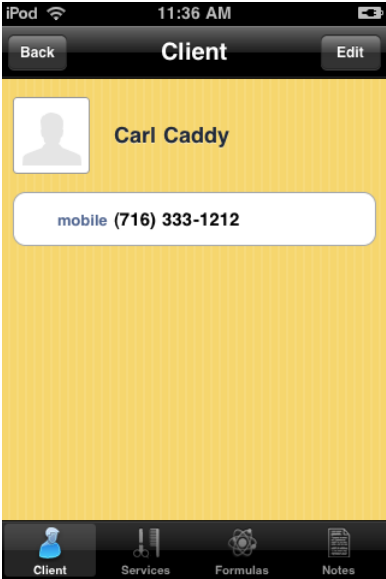
** Note: By default, the 'All Contacts' Group will display. Once you select a client from the devices CONTACTS app, they will automatically be grouped on your device in the PSA Clients Group for easy retrieval of just your clients.

Editing PSA Clients

In the PSA Client application, you may enter as much information or as little information as you would like regarding your client. If you are entering a new Client, you will see Screen 1. If you are editing a Client, select the client and choose EDIT from the right hand corner of screen.

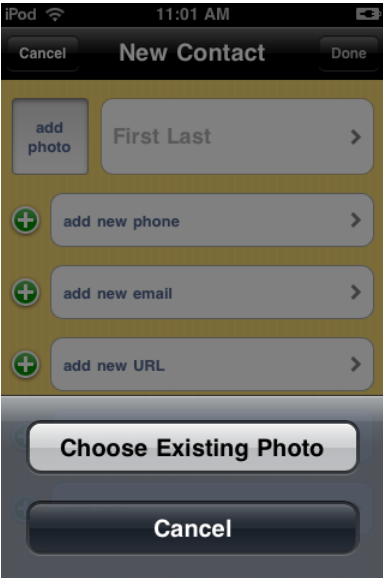


Screen 1

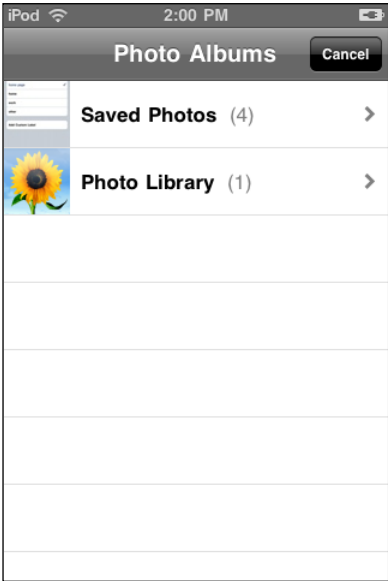


Screen 2

To ADD a PICTURE of your client → Touch 'Add Photo' in the upper left hand corner. Then, touch 'Choose Existing Photo' and your devices default photo albums will display and allow you to select the appropriate picture. On iPhone only, you may also choose the option to take new picture with camera.



To ADD a new PHONE number → Touch 'add new phone'

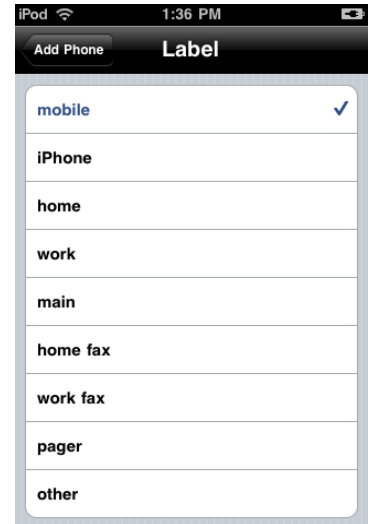




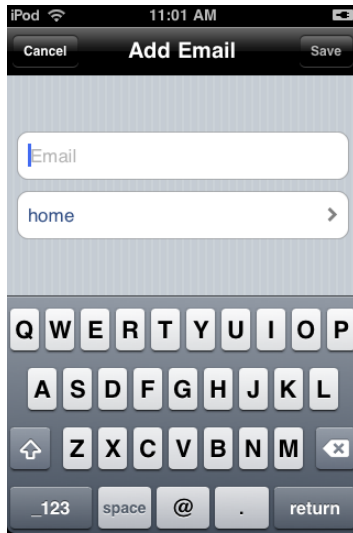
Phone Number

The phone number can be formatted by the iPhone depending on how the phone number entered.

Phone Number Label – When entering a phone number, by selecting field under phone number, you may choose from a list of labels to identify which phone number you are entering.

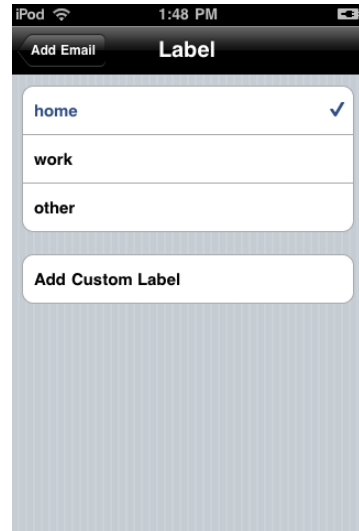


To ADD a new EMAIL address → Touch 'add new email'

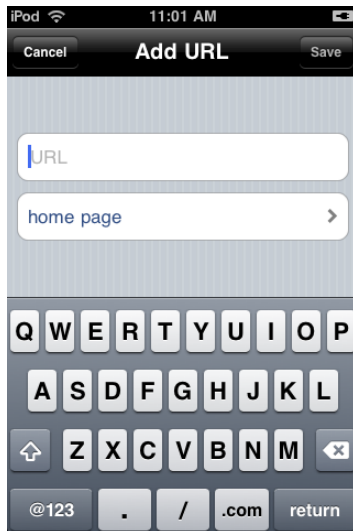


Email - enter the EMAIL address of your client.

Email Labels – select or create your own label that best describes the type of email address entered.

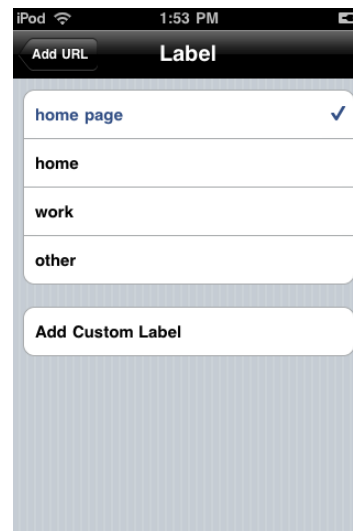


To **ADD a new URL** → Touch 'add new URL'

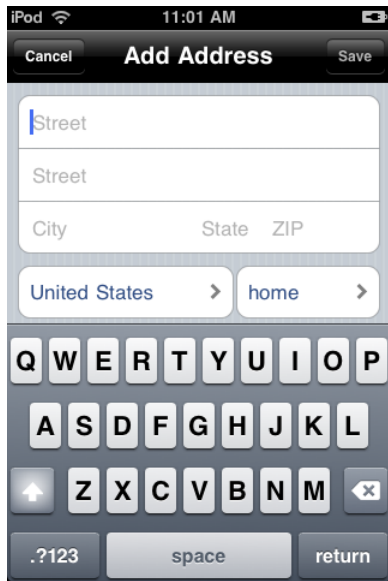


URL – Enter the URL related to your client.

URL Label – Select or create your own label that best identifies the type of URL



To Add a new ADDRESS → Touch 'add new address'



Street - Enter the street address of your client (note, you have 2 lines to enter the street address of your client).

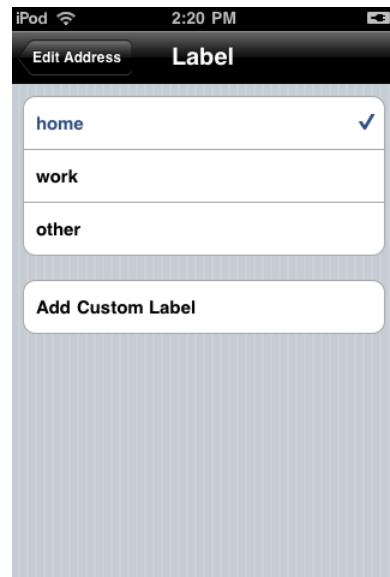
City – Enter the city your client lives in

State – Enter the state abbreviation for your client

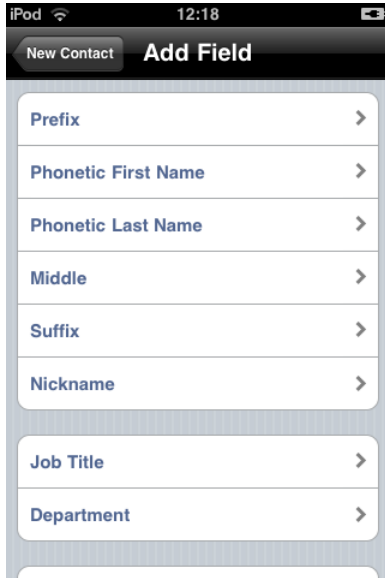
ZIP – Enter the zip code for your client

Country –defaults to 'United States'

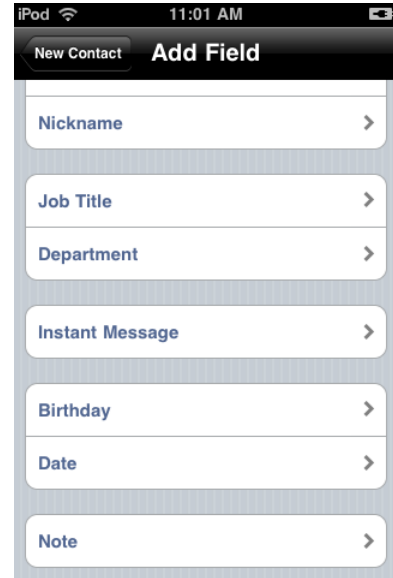
Address Label – Select the appropriate label that defines your customers address



To ADD a FIELD NOT SHOWN → Touch 'add. Select and enter data for the field you selected as required.



** Note: the new field will only display for the client being entered and will NOT be required on other clients.



iPad Enhanced Client Entry Screen

The screenshot displays the iPad Client Entry Screen. On the left is a list of clients, and on the right is a detailed view for Chelsea Contino.

Client List (Left Panel):

- Guest
- Anderson, Abigail (555-4522)
- Brothers, Betty (575) 214-6785
- Contino, Chelsea (555) 233-1212
- Deeds, David (765) 444-3545
- Evergreen, Erica
- Flintstone, Fred (555) 343-2332
- Fluker, Lisa (555) 232-5434
- Generous, George (684) 267-7897
- House, Doctor 1 (555) 555-5555

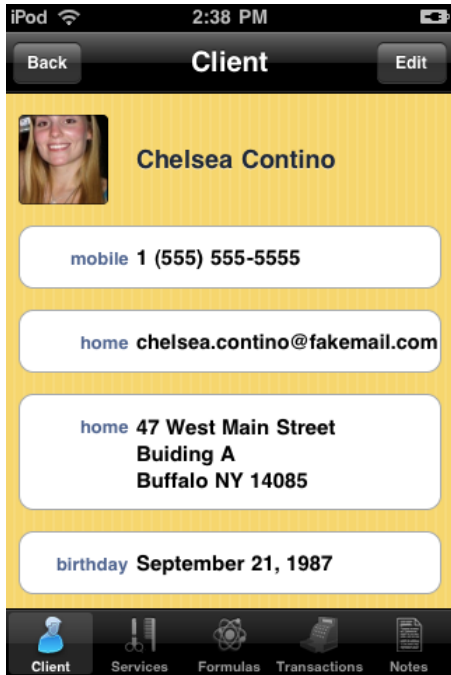
Client Detail View (Right Panel): Contino, Chelsea

- Name:** Chelsea Contino
- Company:** Company
- mobile:** (555) 233-1212
- iPhone:** Phone
- home:** blondie@fakeemail.com
- work:** Email
- home page:** URL
- home address:** 5067 Springdale Lane
- Street:** Happyville, NY, 14212, United States
- add new address:** +

Bottom Navigation: Active, All, New Client, Formulas, Notes, Services, Transactions

Client Transaction History

As you Check Out Clients using the Register App discussed later in this manual, the Client Transaction history automatically builds as each transaction is made. By displaying a Clients Transaction History, you can view each Invoice for the Client in detail, for every appointment they have had.



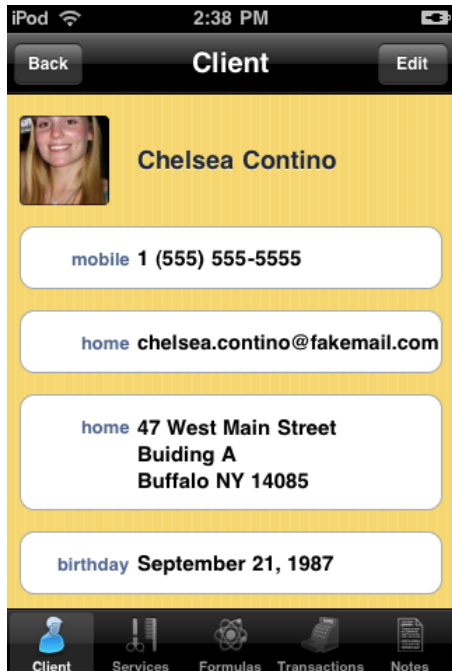
← To view a Clients Transaction History, select **Transactions** button from Menu below Client info.



Once you see the list of Transactions for a Client, you may touch any of the items to view the entire Invoice from their visit that day in time.

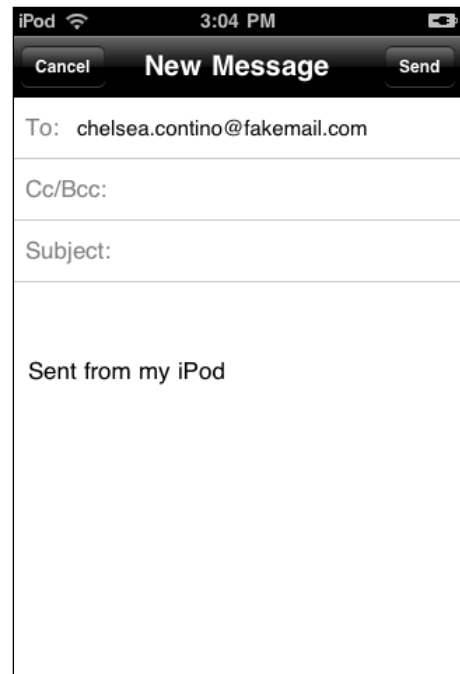
Emailing, Calling & Mapping Clients

PSA has many built in features including the abilities to Email, Call or Get Driving Instructions to their home/office.

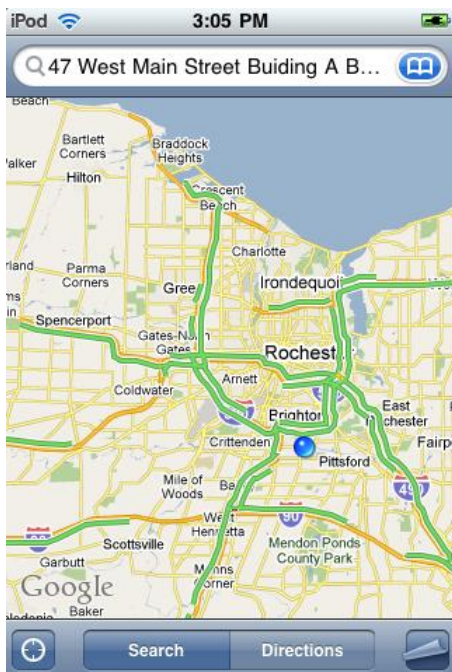


← If you have an iPhone, simply touch the phone number field and you will automatically be telephoning the Client on your iPhone

← If you Touch, the email address of your Client, the email application on your device will automatically open inside PSA now:

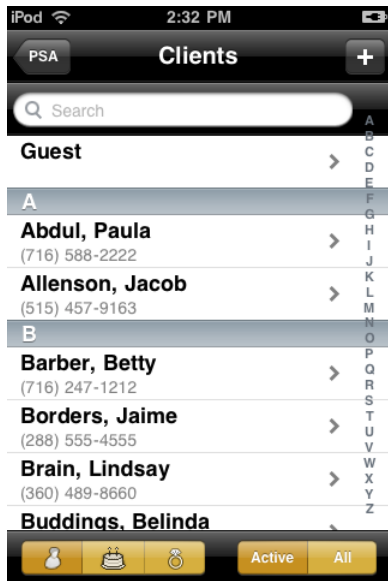


Lastly, by Touching the home address of a Client, you will automatically be shown a map and be able to get directions to their address.



Clients – Birthday & Anniversary Emails

PSA has many built in features including the abilities to send your Clients birthday and anniversary greetings via email.



Birthday Greetings

Touch CAKE icon at the bottom of the Clients screen. If you have put birthdays into your Clients information, this option will tell you all the Clients with birthdays in the next 7 days. When the list is presented, simply touch the EMAIL button to send a Birthday Email. The birthday standard message format is in SETTINGS. You may edit the emails being sent any way you choose to give a more personal greeting

Anniversary

Touch the RING icon at the bottom of the Clients screen. If you have put anniversary dates on your Clients information, this option will tell you all the Clients with anniversaries in the next 7 days. When the list is presented, simply touch the EMAIL button to send an Anniversary Email. The anniversary standard message format can be found in SETTINGS. You may edit the emails displayed or change the format in SETTINGS.

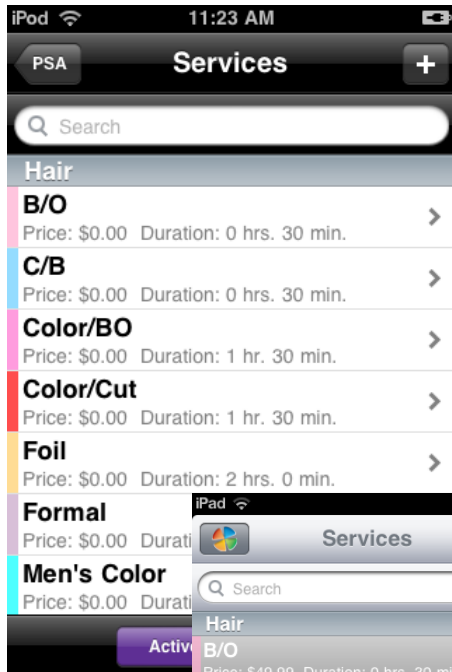
To Return to the CLIENTS VIEW, touch the HUMAN icon (1st icon) in the left hand bottom corner of the screen.

Chapter 4 - Services

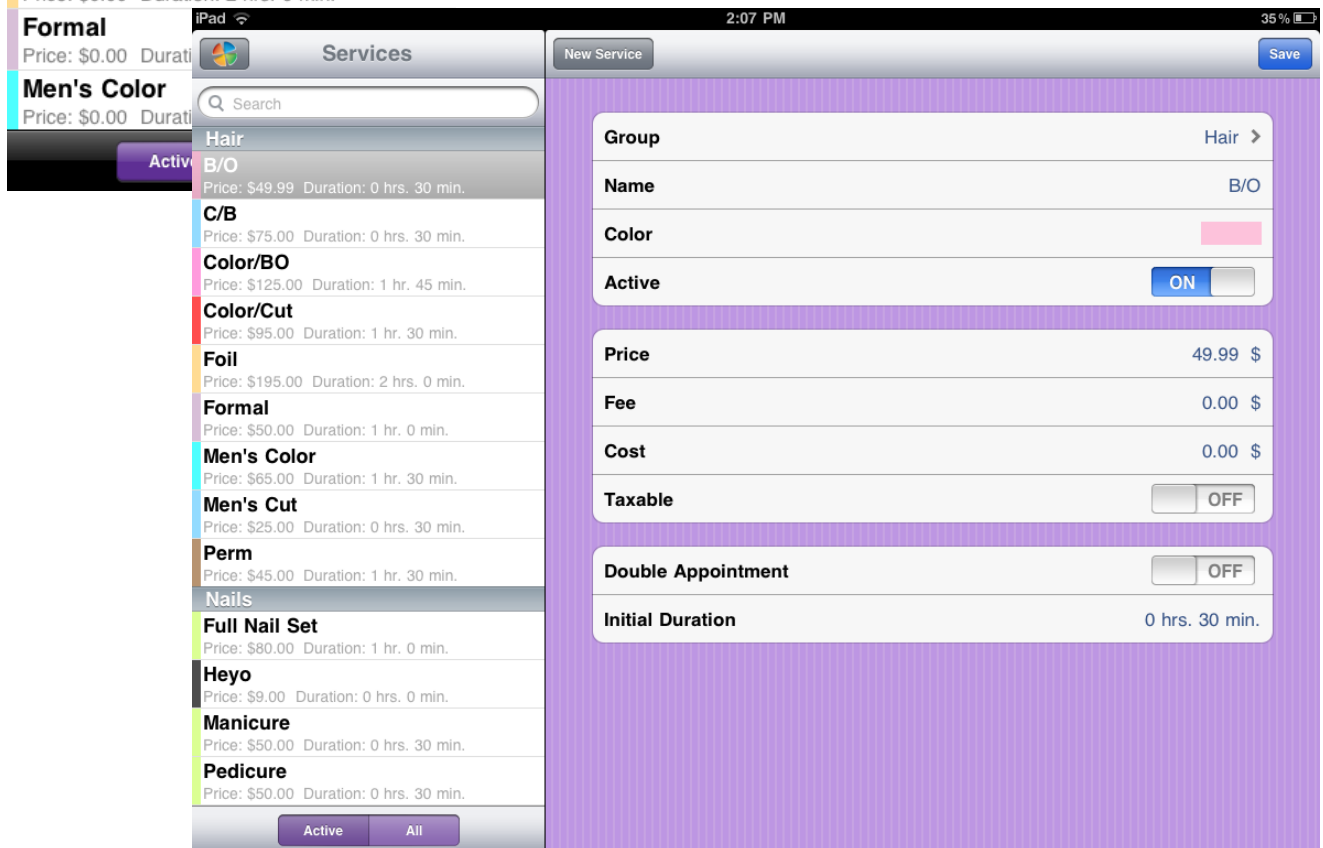
Chapter

4

The SERVICES section allows you to specify the various services you provide to your clients such as cuts, coloring and manicures. PSA automatically comes with standard Hair, Nail & Wax Services. You do NOT have to use these Services. This is YOUR business and should be setup just for you. Go ahead and delete the standard services and start with your own service definitions.



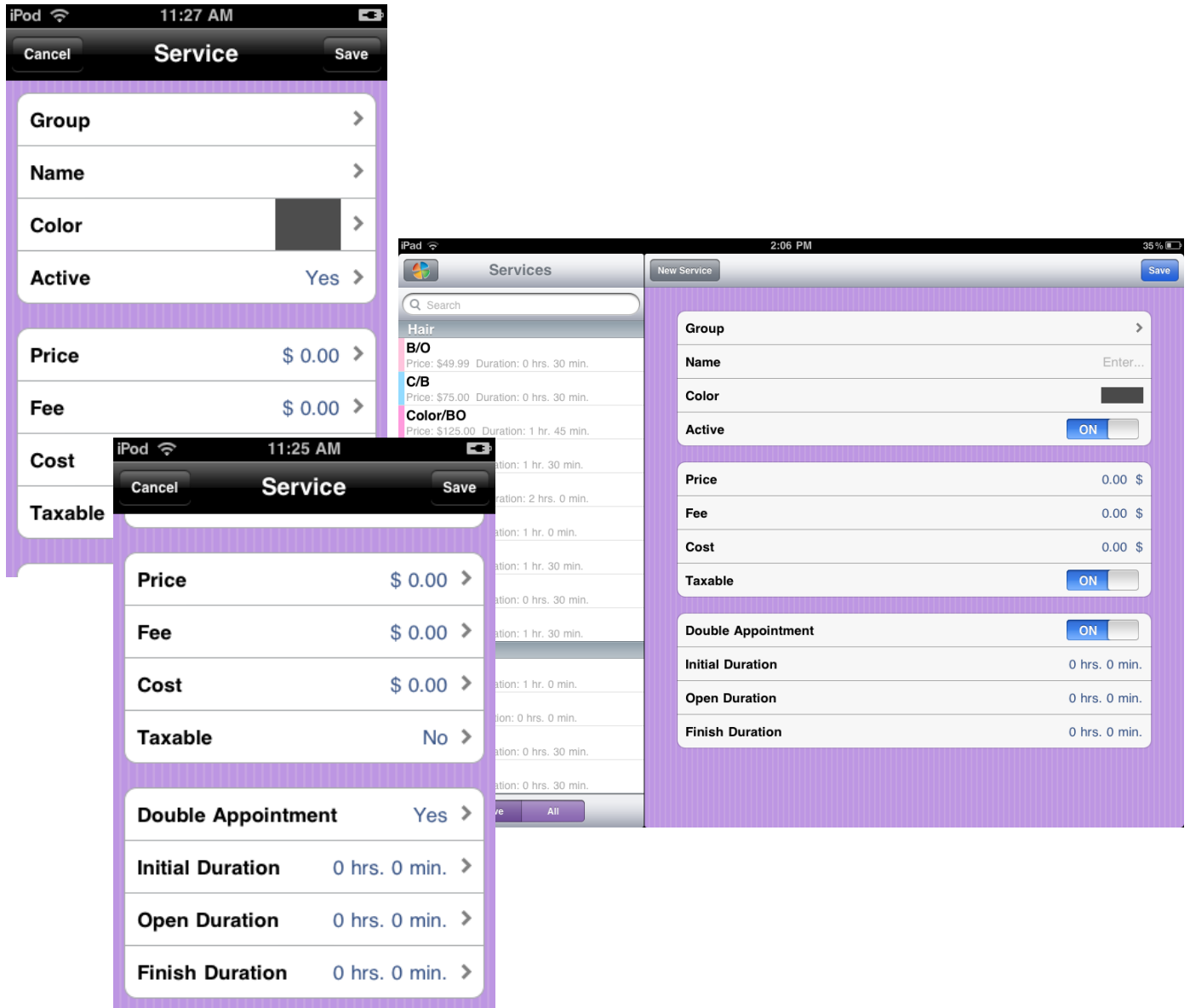
iPhone & iPod Touch Screen



iPad Enhanced Services Screen

Service

After selecting '+' to add a service, the screens below will appear.

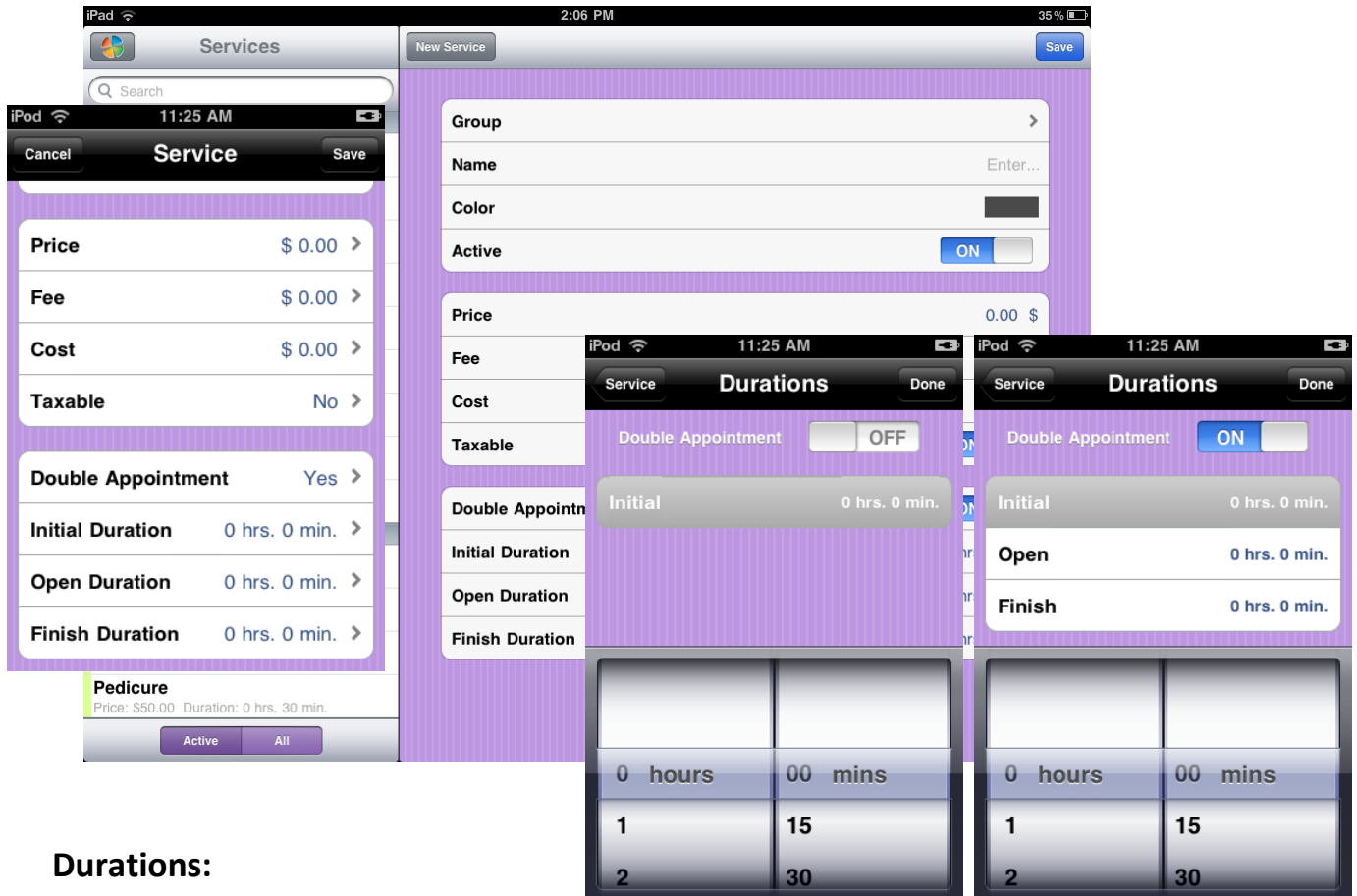


Group	Services refer to the beauty care services you provide your clients, while SERVICE GROUPS are the categories to which these services belong.
Name	Name of Service
Color	Choose the color that you would like your Service to display on your Schedule
Active	When you no longer want a service to display, change active to 'NO'; otherwise, leave ACTIVE 'YES'.
Price	The cost of the Service to your Clients
Fee	If you are interested in deducting a Fee from an operator each time a particular service is performed; you will need to type in a fee amount in the Fee box.
Cost	Indicate the dollar amount that performing this Service actually costs you.
Taxable	Indicates whether or not a particular Service is TAXABLE or not.

How to Define Double Appointments

The last part of setting up a service is defining **how long** the service takes and whether or not there is any 'open' time within the appointment that can be used to book another client.

Double Appointments optimize your time and your schedule.



Durations:

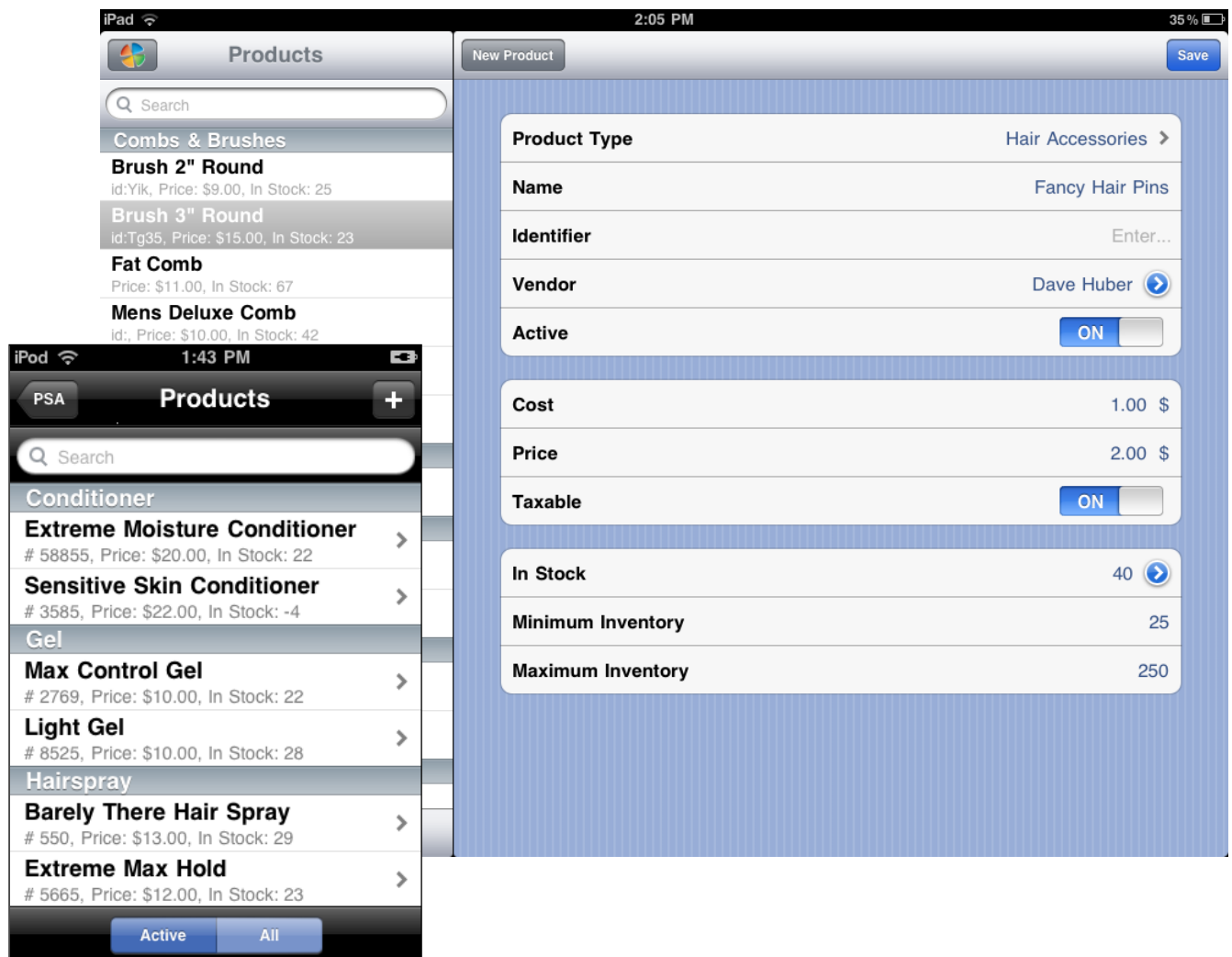
Double Appointment	The 'Double Appointment' selection allows you to 'double book'. 'Double Booking' allows you to optimize your time and schedule by allowing other appointments to book during the gap time of a service. If you do not select 'YES' for Double Appointment, you will only be able to enter a INITIAL DURATION.
Initial	For non-double appointments, INITIAL is the length of time the service will take to perform. For double appointments, Initial indicates how much time is needed for the initial part of the service.
Open	OPEN is only displayed for Double-Appointment Services. Open is the length of time that is the 'waiting' time for the initial service. When an OPEN is defined, your schedule will show a blank time slot available to book another client.
Finish	FINISH is only defined for Double Appointments. FINISH refers to the length of time needed to complete the service after the gap time has passed.

Chapter 5 - Products



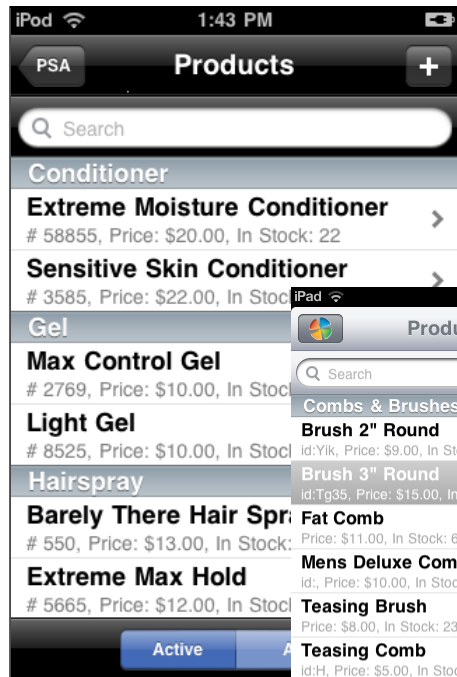
The Products module allows you to define specific retail products that you sell in your business. When you process a transaction for a Product, the price charged at that date and time is stored in the transaction as history. Don't worry about changing your prices, your reports will always be correct.

HINT: Take the time to input your inventory balances and let PSA reporting show you when you have low inventory of your products.



How to Add a Product

iPhone & iPod Touch Screen



ADD a Product

S
A
V
E

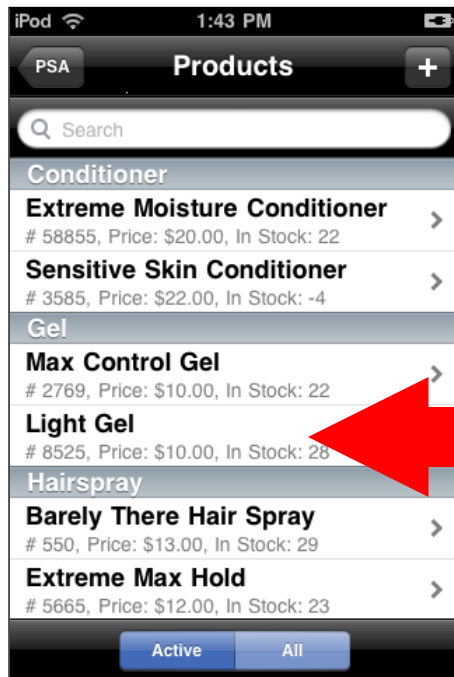
iPad Enhanced Products Screen



Active: Displays only Active

All: Displays Active Clients & DELETED Clients.

How to Delete a Product



To **DELETE** a **PRODUCT**, swipe **RIGHT to LEFT** on the product to delete. A Delete Button will display; touch delete button.

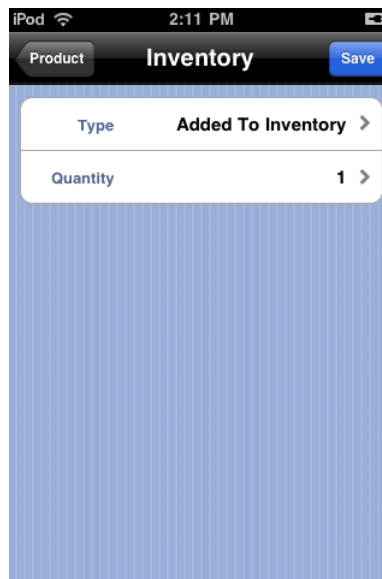
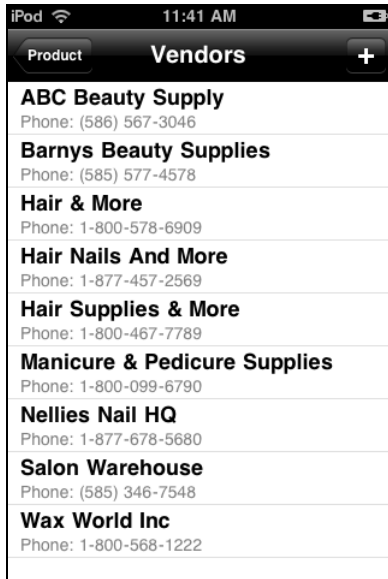
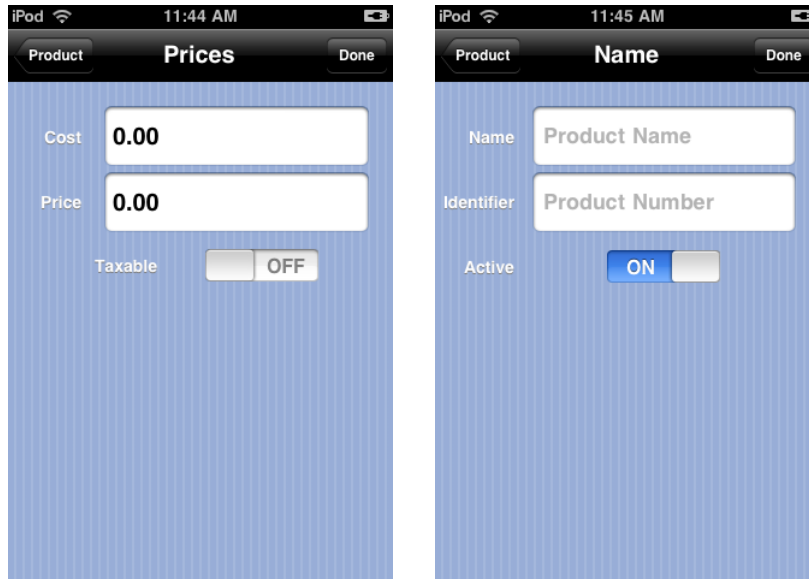
NOTE: Products are **NEVER physically deleted**; they are marked “Inactive”. To display the deleted products (inactive products) and the active products, touch the **ALL button** on the button of the screen. When you want to see the Active Only clients, touch the **ACTIVE button**.

Product Definitions



Product Type	A Product Type is a way of grouping 'like' products. The system automatically ships with Product Types: Conditioner, Gel, Hairspray, Shampoo and Untyped. Use Untyped for products not needing classification.
Name	The Name of the Product
Identifier	Enter the product number used for order the product from Vendor
Active	Only change ACTIVE to 'NO' if you no longer sell this product; otherwise, leave ACTIVE set to 'YES'.
Vendor	The Vendor is the company that sells the Product
Cost	What the Product Cost is to YOU
Price	The Price to be CHARGED to Clients
Taxable	Indicates whether or not a product is taxable 'YES' or 'NO' . If a product is taxable, the tax rate defined in SETTINGS will be used to calculate the final cost of the product in the REGISTER function.
In Stock	Allows you to VIEW or set the balance of the Inventory
Min Inventory	The minimum number of product to maintain.
Max Inventory	The maximum number of product to maintain.

The following are screens that also display when entering a **PRODUCT**:

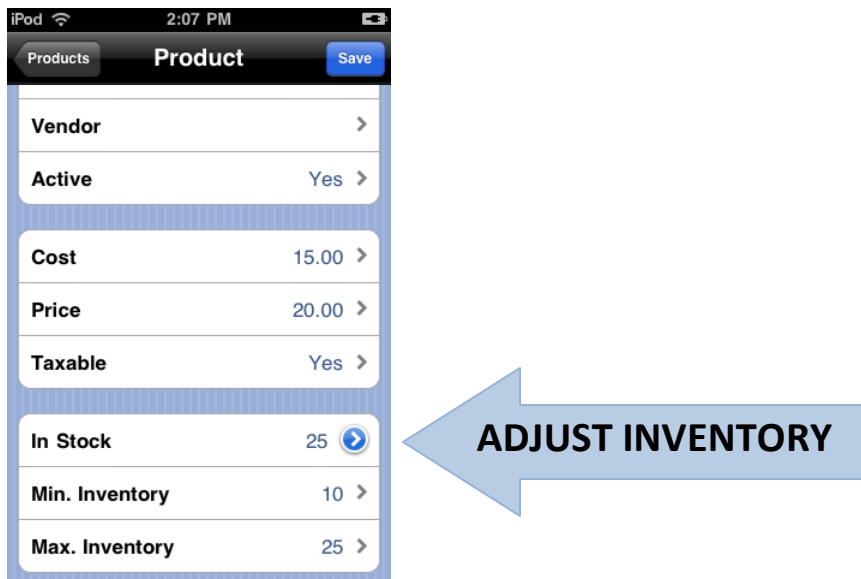


Product Types

Product Types are set in the SETTINGS module. Please click [<here>](#) to review that topic.

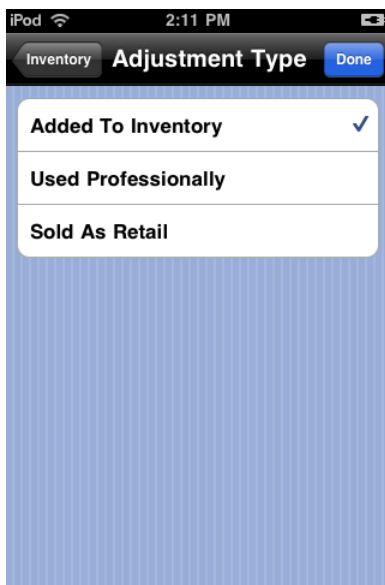
Inventory Control for Products

PSA has built-in Inventory Control as part of the App. With Inventory Control, you can monitor and adjust Inventory as needed. You may also deduct any products that you have used on a Client. PSA automatically deducts Products from your Inventory as Clients purchase them and check out. To properly setup your inventory, it is important to set starting balances of products that you use or sell. Using the Products App, simply touch In Stock to make any adjustments.

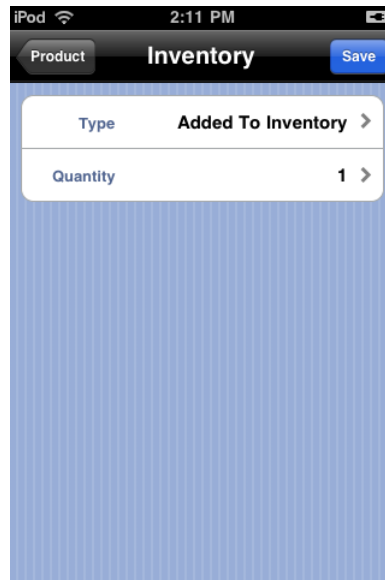


INVENTORY ADJUSTMENT TYPES	
Added to Inventory	This adjustment will raise or add to the total of units in your Inventory. You must enter whole numbers with this type.
Used Professionally	This adjustment is used to denote when you have taken product out of Inventory and are using it professionally on your Clients. This option will subtract the quantity entered from Inventory.
Sold As Retail	This adjustment type is used to subtract from Inventory a specified amount of Product. Normally, when you Check Out a Client, you add Products to their invoice and PSA automatically makes this Inventory Transaction. If you give a Product to the Client for FREE, use this option to adjust your Inventory properly.

Once you have selected your **Adjustment Type**, touch **DONE** in upper right hand corner and the screen below will display waiting for a quantity to be entered.



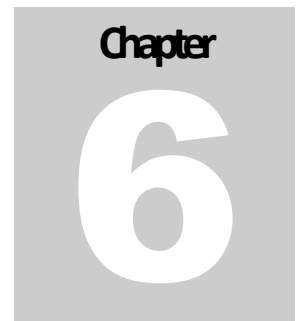
Select Type & Touch Done



SAVE

Note: Reports are available to show you the detail of the Inventory Adjustments.

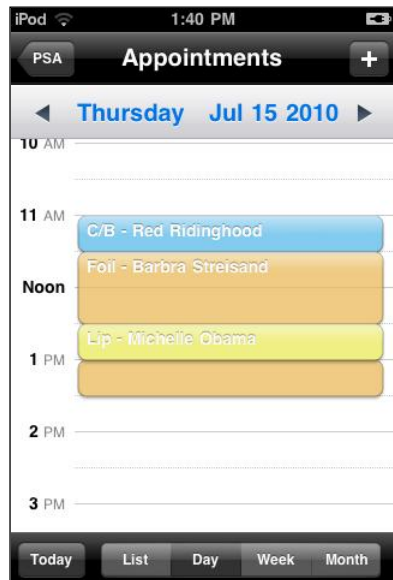
Chapter 6 – Your Schedule & Appointments



PSA Schedule

The SCHEDULE function of your PSA app allows you to view your schedule by the day, 30 Day List, and month. Setting up appointments is easy and foolproof – no more overbooking or conflicting time. And, you can easily check your schedule whenever and wherever you are, making it easier to manage and plan your time.

iPhone & iPod Screens



By default, your PSA Schedule upon entry will **automatically default** to 'today's date'. Once you are in the SCHEDULE, you have many options:

If you are on today's date, the screen automatically scrolls to the current time.

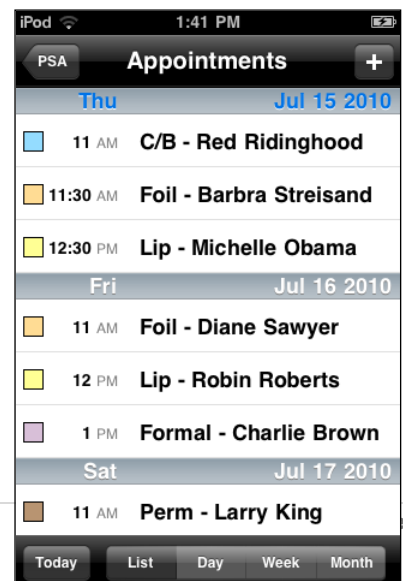
Any other day scrolls to the first appointment

Touching an empty time slot on the screen will allow you to add an appointment immediately for that time slot.

Touching appointment will take you directly to the details of the appointment

You may view your schedule as a **30 DAY LIST** →

You will notice on your schedule all the color coding that you did on the entry of your Services allowing you to easily visualize the type of day ahead of you.



Also, you can view your schedule by **MONTH** →



Notice on the month view, the dots on the various dates.

If a day has a **left dot**, that means you have morning appointments.

If a day has a **right dot**, that means you have afternoon appointments.

If there are **two dots**, you have both morning and afternoon appointments.

When rescheduling a client, the month view is an available tool to quickly scroll through multiple weeks to find their next appointment. Just count down the weeks or touch the arrow for the next month for

extended appointments.

Lastly, you can view your schedule by **WEEK** →



At any time, you can touch an empty space in this view and add an appointment for that date and time.

You can also scroll through the weeks (Sun-Sat) by touching the right arrow ← or left arrow → to view weeks prior or future.

← At any time, you can change your view to one of the other options.

iPad Enhanced Schedule

iPad 2:06 PM 35%

Menu Day Week Month

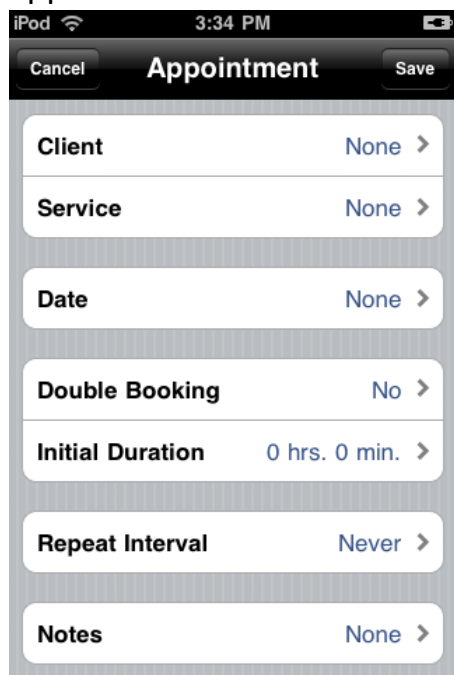
February 2011

	20 Sunday	21 Monday	22 Tuesday	23 Wednesday	24 Thursday	25 Friday	26 Saturday
8		Doctor appt	Marys school play	Coffee	Brothers, Betty (575) 214-6785	Contino, Chelsea	*White, Betty (555) 354-3229
9		Brothers, Betty		Guest	Joyful, Jordan	Joyful, Jordan (343) 244-3343	
10		*Anderson, Abigail		Brothers, Betty (575) 214-6785	Joyful, Jordan	Hughes, Jeremy	
11		Generous, George	Flintstone, Fred		Flintstone, Fred	Anderson, Abigail	
12		Zimmerman, Karen (355) 324-5425	Anderson, Abigail 555-4522	Deeds, David (765) 444-3545	Flintstone, Fred	Deeds, David	
1		Contino, Chelsea	Fluker, Lisa	Contino, Chelsea (555) 233-1212	White, Betty (555) 354-3229	Deeds, David	
2		Contino, Chelsea (555) 233-1212	Lunch	Contino, Chelsea	Anderson, Abigail	Fluker, Lisa (555) 374-9742	
3			Contino, Chelsea		Fluker, Lisa (555) 232-5434	Contino, Chelsea (555) 233-1212	
4		Anderson, Abigail	Loblaw, Bob (585) 555-5555	Anderson, Abigail		Brothers, Betty (575) 214-6785	
5		*Deeds, David	Flintstone, Fred	Fluker, Lisa		House, Doctor	
6		Lunch with Susie			Contino, Chelsea (555) 233-1212		
7			Loblaw, Bob (585) 555-5555			Generous, George (684) 267-7897	
8			Important, Ingrid				

Today ◀ ▶ +

Scheduling a New Appointment from the Schedule

Scheduling an appointment from the Scheduler is very easy. From the main schedule screen, simply touch the '+' and you are ready to begin scheduling an appointment for a client.



The screenshot shows the 'Appointment' screen on an iPod. At the top, there is a status bar with 'iPod', signal strength, '3:34 PM', and battery level. Below the status bar is a navigation bar with 'Cancel' on the left, 'Appointment' in the center, and 'Save' on the right. The main content area consists of several rows, each with a label on the left and a value on the right, followed by a right-pointing chevron. The rows are: 'Client' with 'None', 'Service' with 'None', 'Date' with 'None', 'Double Booking' with 'No', 'Initial Duration' with '0 hrs. 0 min.', 'Repeat Interval' with 'Never', and 'Notes' with 'None'.

The screen above represents the very basics needed to schedule an appointment for your client.

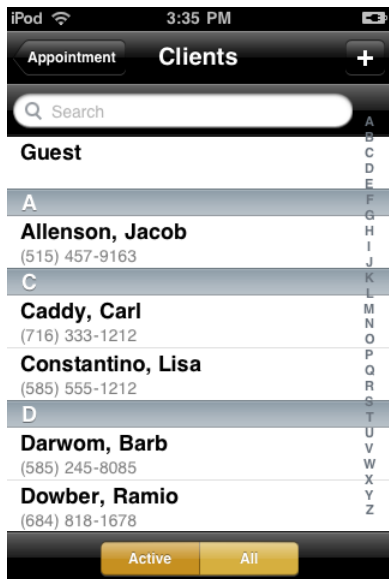
To schedule an appointment you will need to enter your Client, the Service and the date & time of the appointment. After you choose the service, if the Service has been predefined as a Double Booking or regular appointment, you will see the preset durations or length of appointment needed. All of the durations may be changed by individual client.

If you have booked a **STANDING APPOINTMENT**, the Repeat Interval will display.

Optionally, you may enter notes regarding this appointment using the **NOTES** section on the bottom of the Appointment Screen.

Steps to make an appointment:

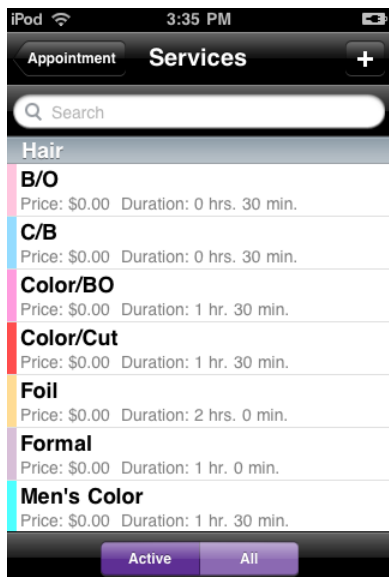
Step 1 - Select Your Client



Begin scheduling an appointment by searching or selecting your client.

*** NOTE: By default, only ACTIVE clients will display

Step 2 – Select or Search for a Service. Note: You may also add a Service from this screen.

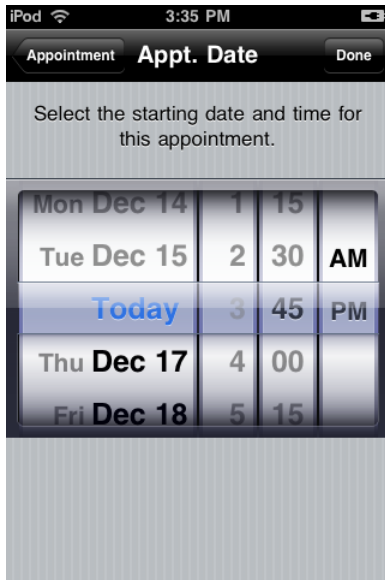


Remember when you entered your settings, Services are 'grouped' by Service Groups. When selecting a service, you should first look for the appropriate Group which is shaded in grey.

Optionally, you may also use the Search Bar to locate a particular Service.

*** NOTE: By default, this screen will always show ACTIVE

Step 3 - Select the Date & Time of Appointment

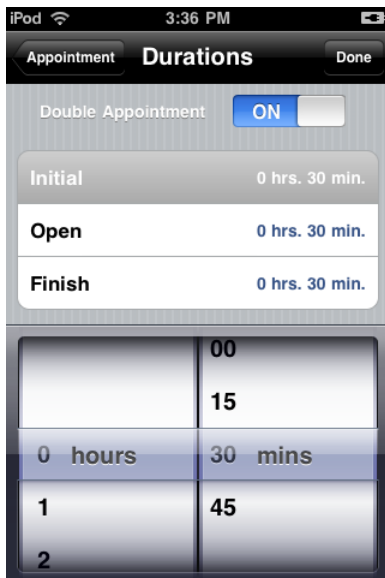


*** Note: Screen defaults to 'today's date' or the date you chose on previous screen.

Step #4 – Change the Length of the Appointment

If this is a Double Booking Appointment, you may change the Initial Time, the Open (gap) Time, and the Finish Time. If just a regular appointment, you may change the Initial length of the appointment.

Intervals in schedule preloaded from the SETTINGS APP for Appointment Duration, but you may alter them for each individual appointment.

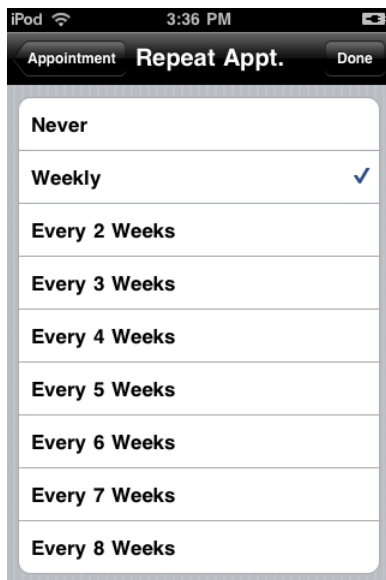


INITIAL Duration: This is the length of time that you will need at the beginning of the client's appointment to perform part of a service.

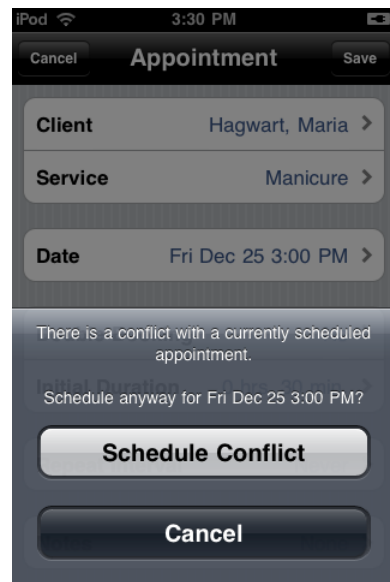
OPEN Duration: This is the length of time that you can schedule another appointment. This is also referred to as the 'gap' time.

FINISH Duration: This is the length of time that you will need to complete the service for the customer.

Step #5 – Indicate whether or not this is a **STANDING** appointment.

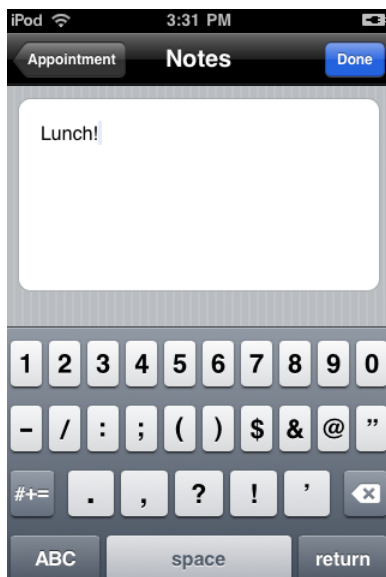


Standing Appointments can be scheduled Weekly, or every 2-8 weeks depending upon your client.



If there are any conflicts in your schedule while booking a Standing Appointment, messages will appear indicating appointments that are conflicting. With a conflict, you can only choose to book or not book appointment.

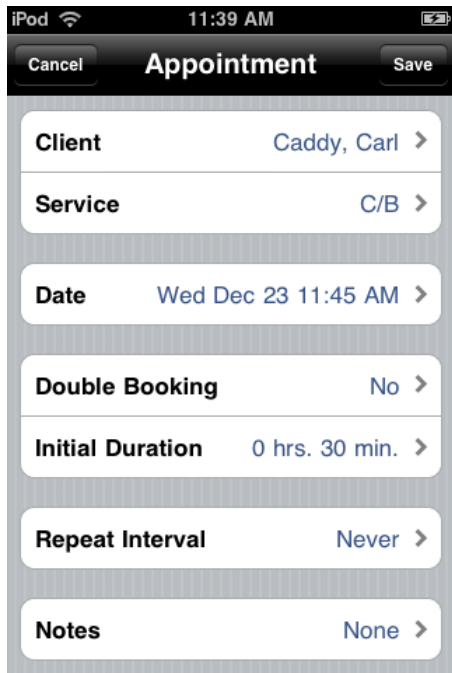
Step # 6 – Add any Notes



The Notes section of an appointment is for your information regarding the appointment or time slot.

Step # 7 – Completing the Appointment

When you complete the required entries for an Appointment, you must tap **SAVE** in the upper right hand corner of the screen.



iPod 11:39 AM

Cancel Appointment Save

Client Caddy, Carl >

Service C/B >

Date Wed Dec 23 11:45 AM >

Double Booking No >

Initial Duration 0 hrs. 30 min. >

Repeat Interval Never >

Notes None >



Hint: If you would like to book more than one appointment in the same time slot, select an open time slot; then, select the desired time slot when prompted.

Working with the iPad Schedule

Below is the new Enhanced PSA Schedule on an iPad. All views (Daily, Weekly & Monthly) have similar functionality for ease of use. On each view, you can go back to the PSA Main Menu, toggle between views, add an appointment (various ways) and go backwards & forwards days, weeks and months.

PSA SCHEDULE – WEEKLY VIEW on an iPad

PSA MAIN MENU BUTTON

TOGGLE BETWEEN:
DAILY VIEW
WEEKLY VIEW
MONTHLY VIEW

TOUCH ON APPT TO CHANGE/VIEW

TOUCH IN EMPTY SPACE TO CREATE AN APPOINTMENT THERE

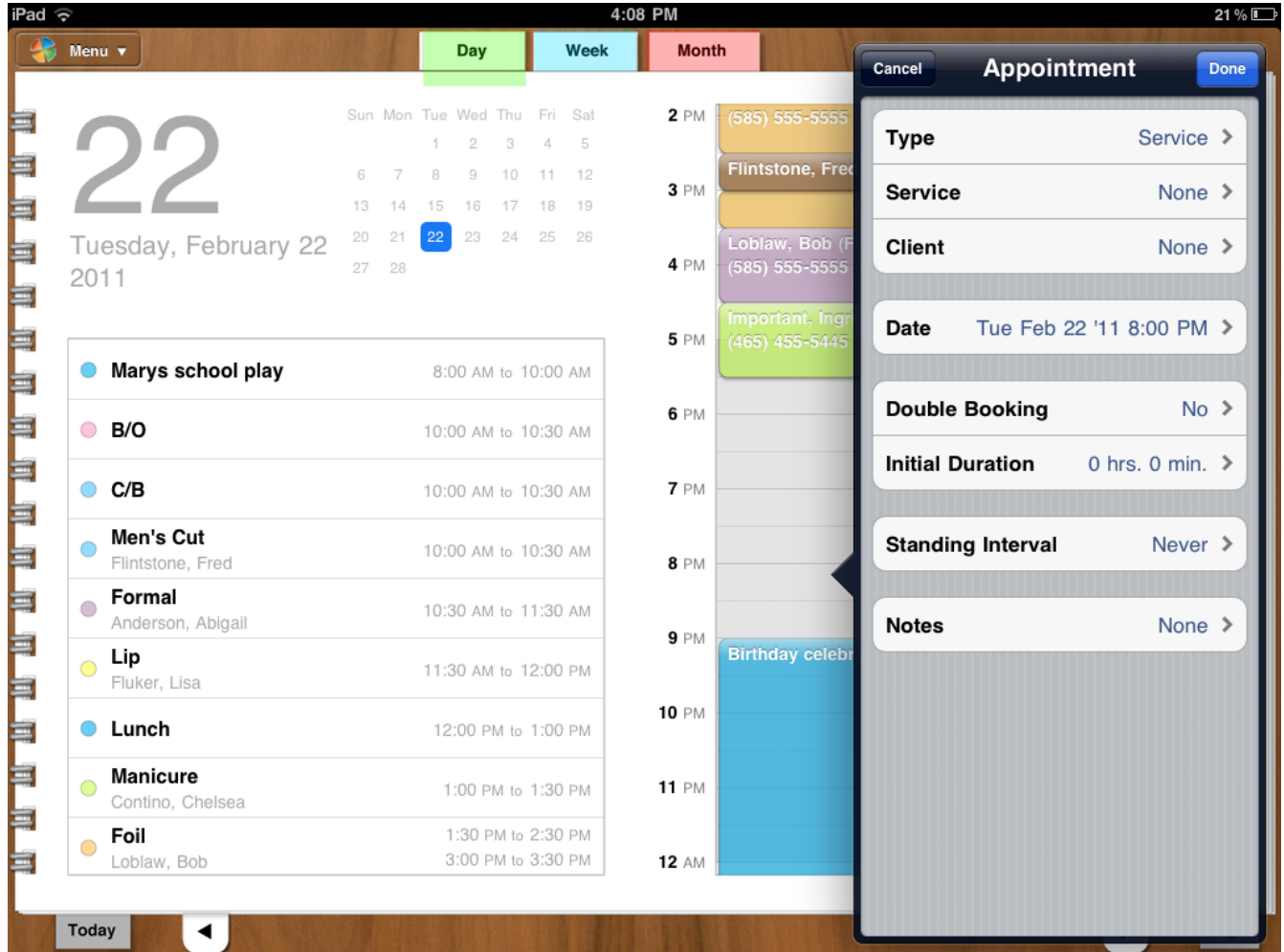
BACKWARDS & FORWARD

Make APPOINTMENT

	20 Sunday	21 Monday	22 Tuesday	23 Wednesday	24 Thursday	25 Friday	26 Saturday
8		Doctor appt	Marys school play	Coffee	Brothers, Betty (575) 214-6785	Contino, Chelsea	*White, Betty (555) 354-3229
9		Brothers, Betty		Guest	Joyful, Jordan	Joyful, Jordan (343) 244-3343	
10		*Anderson, Abigail		Brothers, Betty (575) 214-6785	Joyful, Jordan	Flintstone, Fred	Hughes, Jeremy
11		Generous, George	Flintstone, Fred		Loblaw, Bob	Anderson, Abigail	Deeds, David
12		Zimmerman, Karen (355) 324-5425	Anderson, Abigail (555) 322	Deeds, David (765) 444-3545	Flintstone, Fred	White, Betty (555) 354-3229	Deeds, David
1		Contino, Chelsea		Contino, Chelsea (555) 233-1212	Anderson, Abigail	Pluker, Lisa (555) 374-9742	
2		Anderson, Abigail	Contino, Chelsea	Contino, Chelsea (555) 233-1212	Fluker, Lisa (555) 232-5434	Contino, Chelsea (555) 233-1212	
3		*Deeds, David	Loblaw, Bob (585) 555-5555	Anderson, Abigail	Fluker, Lisa		
4		Lunch with Susie	Flintstone, Fred				
			Loblaw, Bob (585) 555-5555		Contino, Chelsea (555) 233-1212		
			important, Ingrid			Generous, George (684) 267-7897	

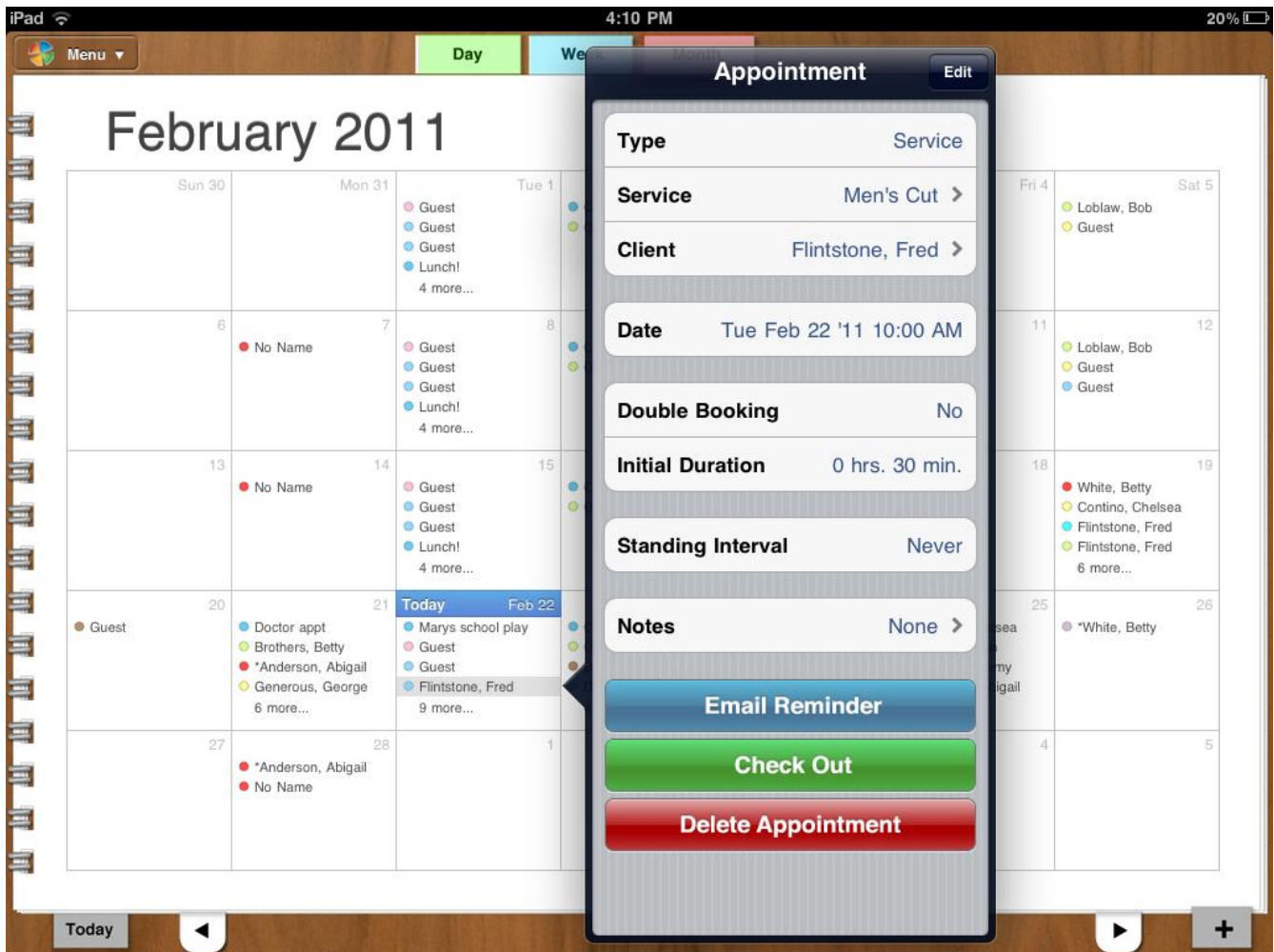
PSA SCHEDULE – DAILY VIEW on an iPad

Using the Daily View of the Schedule allows you to add, change & delete appointments. You may move around the month by just tapping on the day of the month in the full calendar displayed. You can go backwards and forwards by day using the arrows at the bottom of the screen.



PSA SCHEDULE – MONTHLY VIEW on an iPad

Using the Monthly View, you may also schedule an appointment and/or change an existing appointment. Touch the appointment on the screen and the appointment details will display. You may edit the appointment, send an email reminder and even check out your client. You can go months backwards and months forward by using the arrows at the bottom of the screen.



Notes on an Appointment

Another feature of your Personal Salon Assistant is the “temporary notes” feature which is available on each Client Appointment. Each Client has a NOTES section on their Client Profile, but you may optionally enter NOTES on an Appointment.

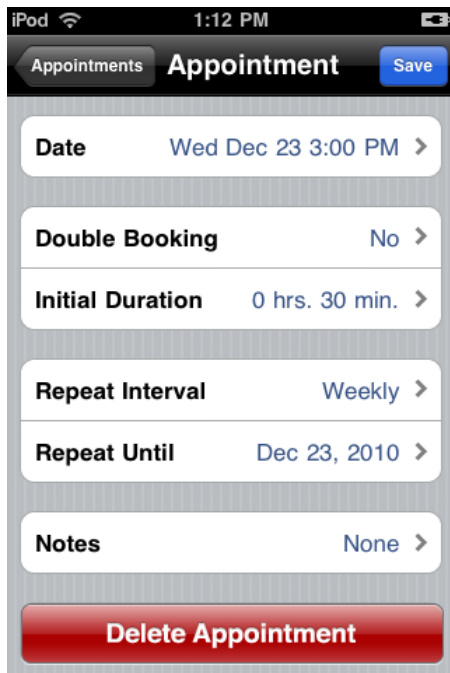
When you enter notes on an APPOINTMENT, the Schedule will automatically put an asterick (*) in front of the Service indicating at a glance that you have special notes for this appointment. The asterick will display on Weekly Views and Daily Views.



← Notice the asterick in front of Service

Deleting Appointments

Deleting appointments is easy with PSA. Simply locate the appointment in the schedule or in the list of Services in the Clients section, then scroll to the bottom of the appointment and touch DELETE APPOINTMENT in red.

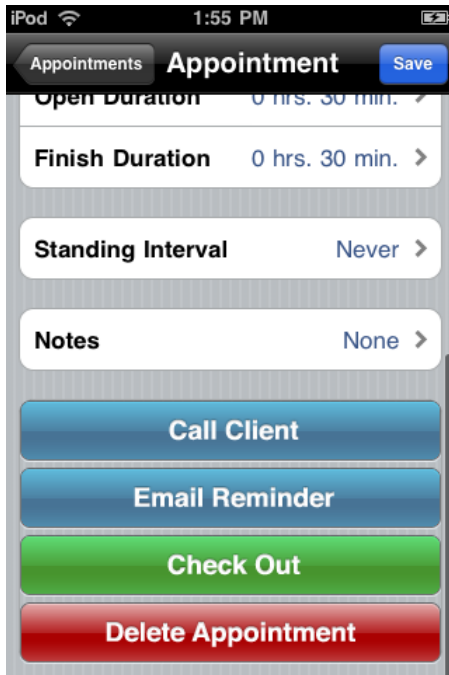


To Delete an Appointment → Tap on **Delete Appointment** beneath the Notes section.

Scheduling Clients using the Schedule

In the scheduling module, there will be times that you need to call your Client. You do not want to have to go back to the Clients module to look up the phone number. By touching the Appointment and scrolling to the bottom of the Appointment screen, you will see the CALL CLIENT button.

If you do not have an iPhone, the device will simply bring up the customers phone number if you have entered one for the Client.



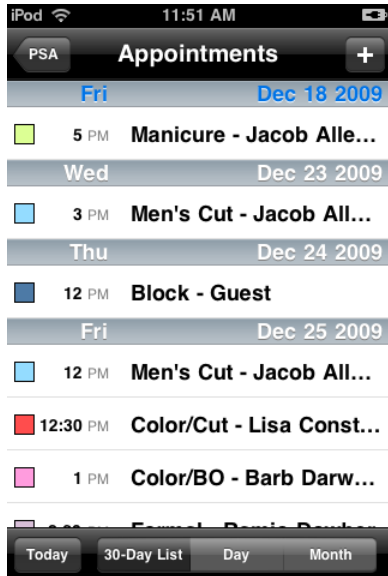
To Call your Client or quickly get their phone number, touch Call Client button.

If you have an iPod Touch or iPad, the screen to the right will display. As you can see, the phone number is listed just above the OK button.



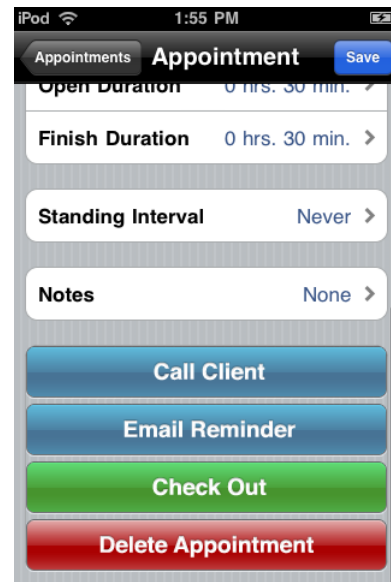
Appointment Reminders

In the scheduling module, Appointment Reminders has been added. To use this function, simply bring up the SCHEDULE in any format that is easiest to use for this function. We recommend the following view:

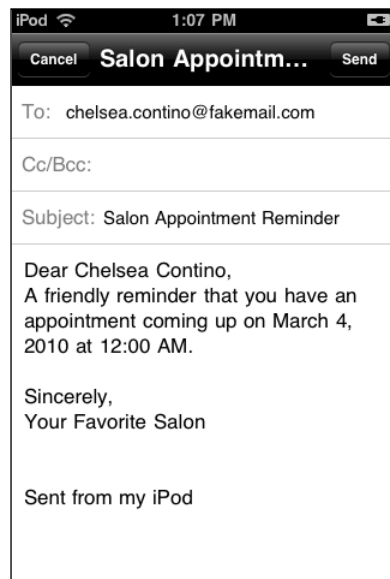


When using the 30-Day List, TOUCH appointments one at a time to send out an Appointment Reminder.

Then select EMAIL REMINDER in the screen below:



Lastly, the email that will be sent is displayed. You may change any and all of the information in the email if you choose. Once you are done, touch the EMAIL SEND icon in the upper right-hand corner.

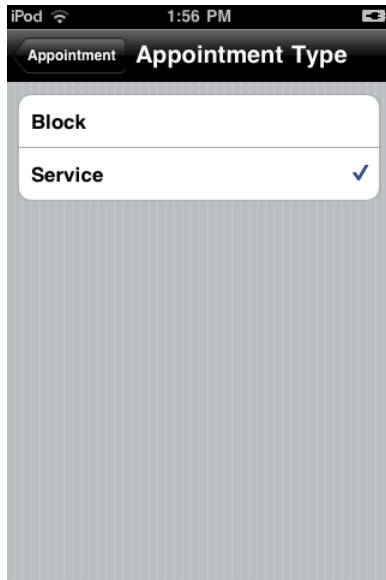


Blocking Out Time

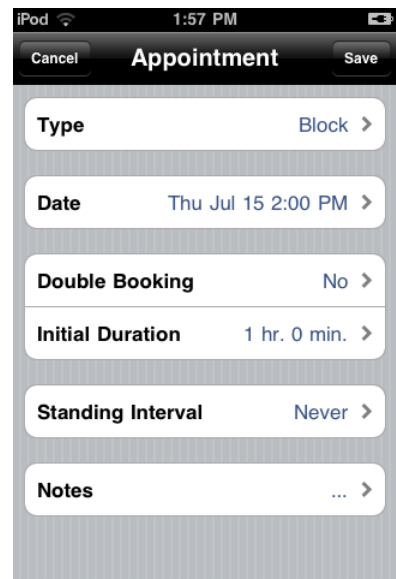
There will be times when you need to note on your schedule times that you will NOT be available for Services. We call this BLOCK time.

Scheduling – Appointment Reminders

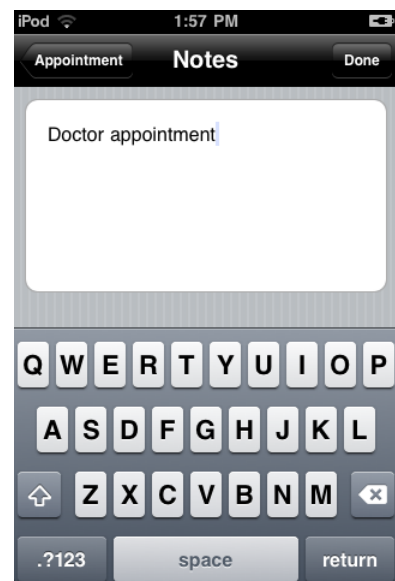
In the place a BLOCK in your schedule, when making an appointment, instead of selecting SERVICE, you will select BLOCK by touching Service on the appointment being added. The screen below will display:



After you select BLOCK, this screen then display →

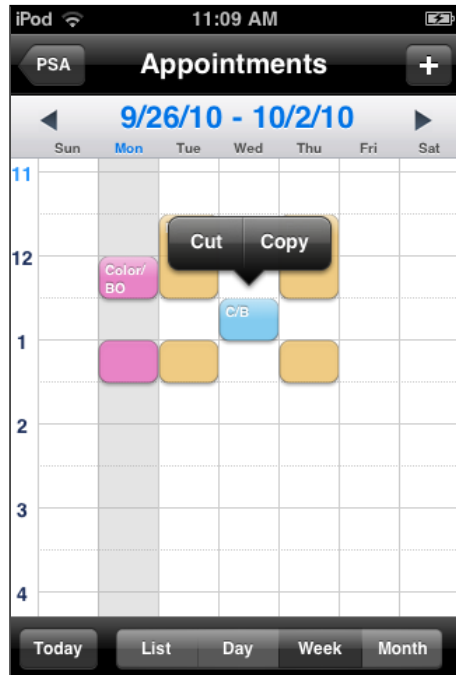


Block has one more feature. You may put in NOTES on the appointment and these notes will display on your schedule. →



How to Cut, Copy & Paste Appointments

Copying and pasting appointments is a new feature for PSA. This feature only works in the DAY and WEEK calendar views.

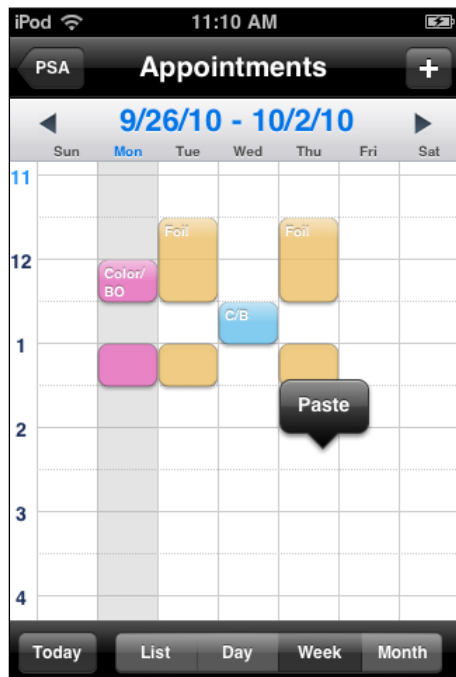


← To Cut/Paste (move appointment), hold your finger on the appointment to move until you see the CUT/COPY buttons; then select CUT

Next, go to the date & time that you want to move the appointment to and press on screen until you see PASTE.

← To Copy/Paste (copy appointment to other dates/times), hold your finger on the appointment to bring up CUT/COPY; select COPY. Next, go to as many dates and times as you would

like to paste/copy appointment.



← To Paste, hold finger on schedule to the date and time that you want to paste the appointment you are cutting or copying until you see PASTE. Touch PASTE and the appointment will display.

Chapter 7 - Formulate

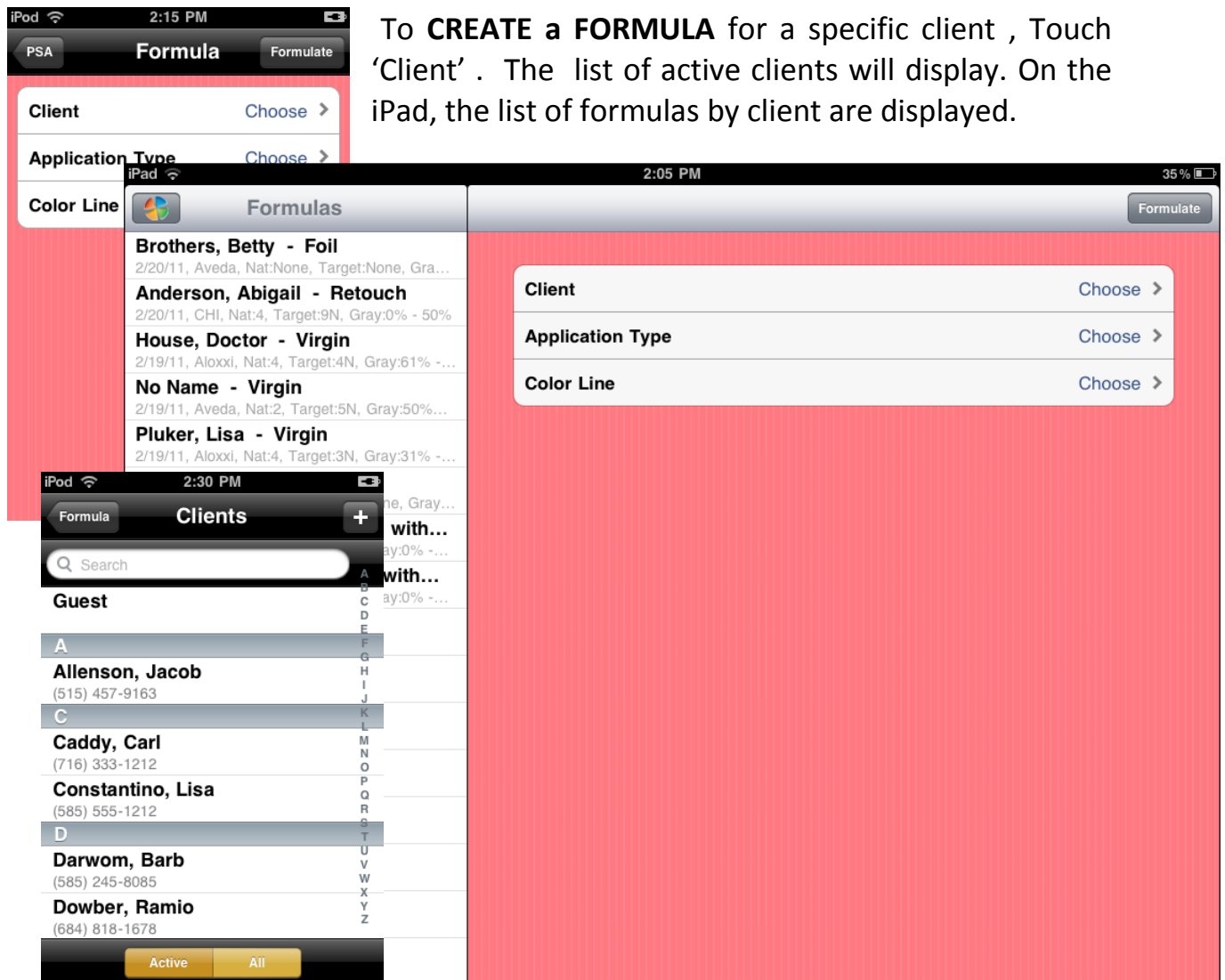
Chapter

7

The FORMULATE application of PSA provides you with Salon Technologies patented hair color formulating system. From the specific information you enter for any client, you are given the correct formulas for perfect hair coloring. No guessing, no mistakes, no redoing colors. A few clicks and you are on your way.

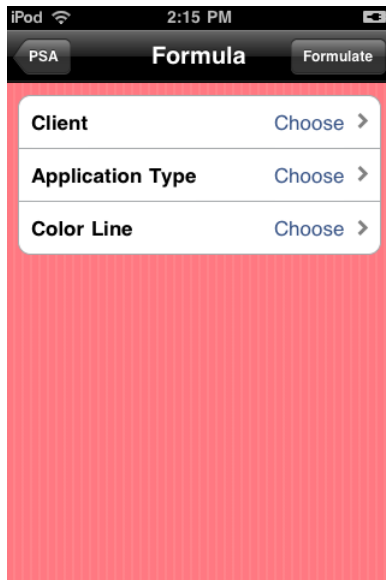
Not only can you save your Clients formulation, you can save all your Clients formulations from every color appointment.

To **CREATE** a **FORMULA** for a specific client , Touch 'Client' . The list of active clients will display. On the iPad, the list of formulas by client are displayed.



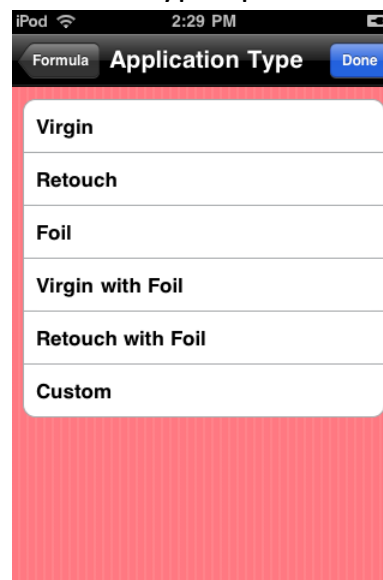
Selecting Application Type

Once you select your client, the next step is to select the 'Application Type'. You may only select one Application Type. If you are not using

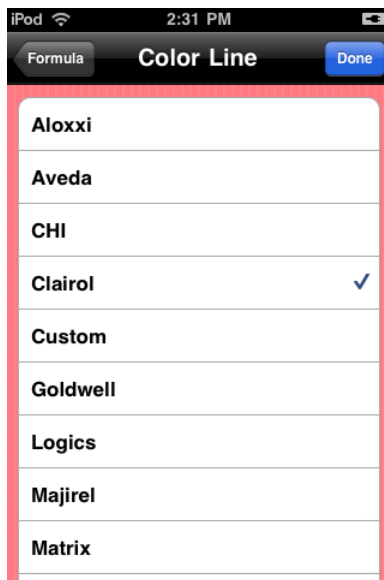


To SELECT APPLICATION TYPE → Touch one of the types provided. A check mark will appear on your selection.

Tap the DONE button when complete.



Selecting a Color Line



Our PSA APP works with the following Color Lines:

Alfaparf, Aloxxi, Aveda, CHI, Clairol, Custom, Goldwell, Logics, Majirel, Matrix, Paul Mitchell, Pravana, Redken, Schwarzkopf and Vero.

** Note, only 'active colorlines' as selected in SETTINGS will display.

Natural Color, Target Color & Percent of Gray

Depending upon the Colorline selected, one or more of the following screens will display as required by the Color line manufacturer:

1
2
3
4 ✓
5
6
7
8
9

3NN
4NN
5NN
6NN
7NN ✓
8NN
1N
2N
3N

0% - 50%
50% - 100%

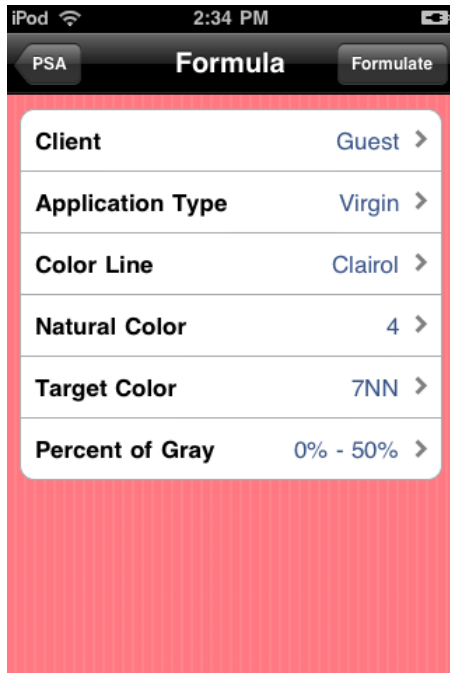
Foils

Depending upon your selection of color line and application type, the FOIL screens may or may not appear:



Formulation

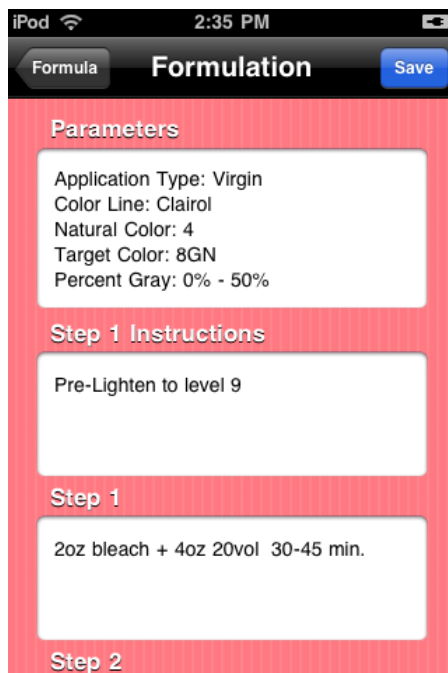
Once you have provided the formulation information needed for a particular color line, the application is ready to create your detailed formula and instructions.



To FORMULATE → Touch the FORMULATE button in upper right hand corner.

**Note: Depending upon the Application Type and Color Line selected, different screens will appear as required. Not all Color Line's use the same values to calculate the formula.

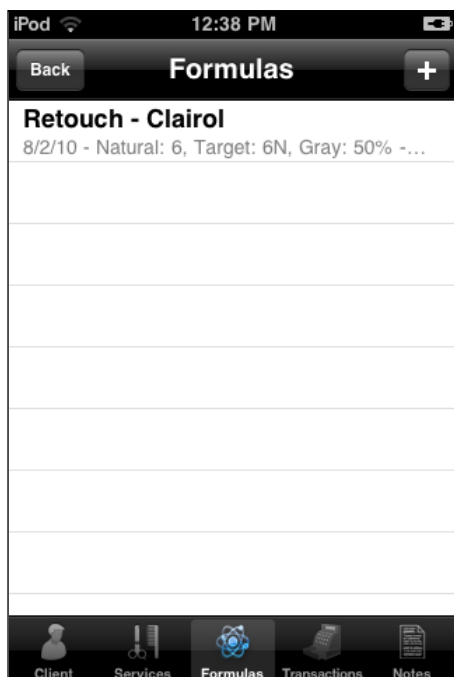
Once you touch the FORMULATE button, the screens below detail the parameters you gave the app, as well as Step 1 and Step 2. Optionally, you might also have a Foils section.



**** Feel free to edit your formula and notes, then hit SAVE.**

Once your formulation is complete, touch the **SAVE** button in the upper righthand corner of the Formulation screen.

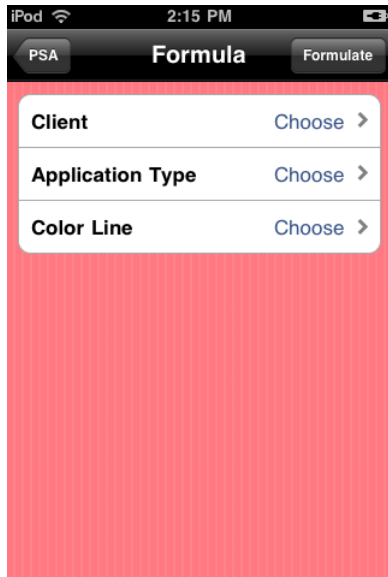
You will see the following message displayed:



To view this formula again, go to the CLIENTS module, select your Client, then touch the FORMULAS button at the bottom of the screen:

Creating Custom Formulas

Creating and saving custom formulas is easy with PSA. Simply choose your client and choose Application Type: CUSTOM. Using the CUSTOM option allows you to freely create your custom formula by entering Step 1, Step 2, Refreshing Options and Foils without pointing to any particular color line.



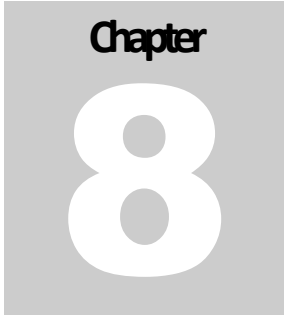
To CREATE A CUSTOM FORMULA → Select your client, then select Application Type CUSTOM. Next, touch the button FORMULATE.

The screens below display the areas available for your custom formula. Just type away.

****NOTE:** Be sure to use the SAVE button when you are done!

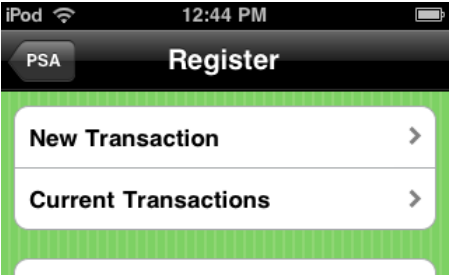


Chapter 8 - Register

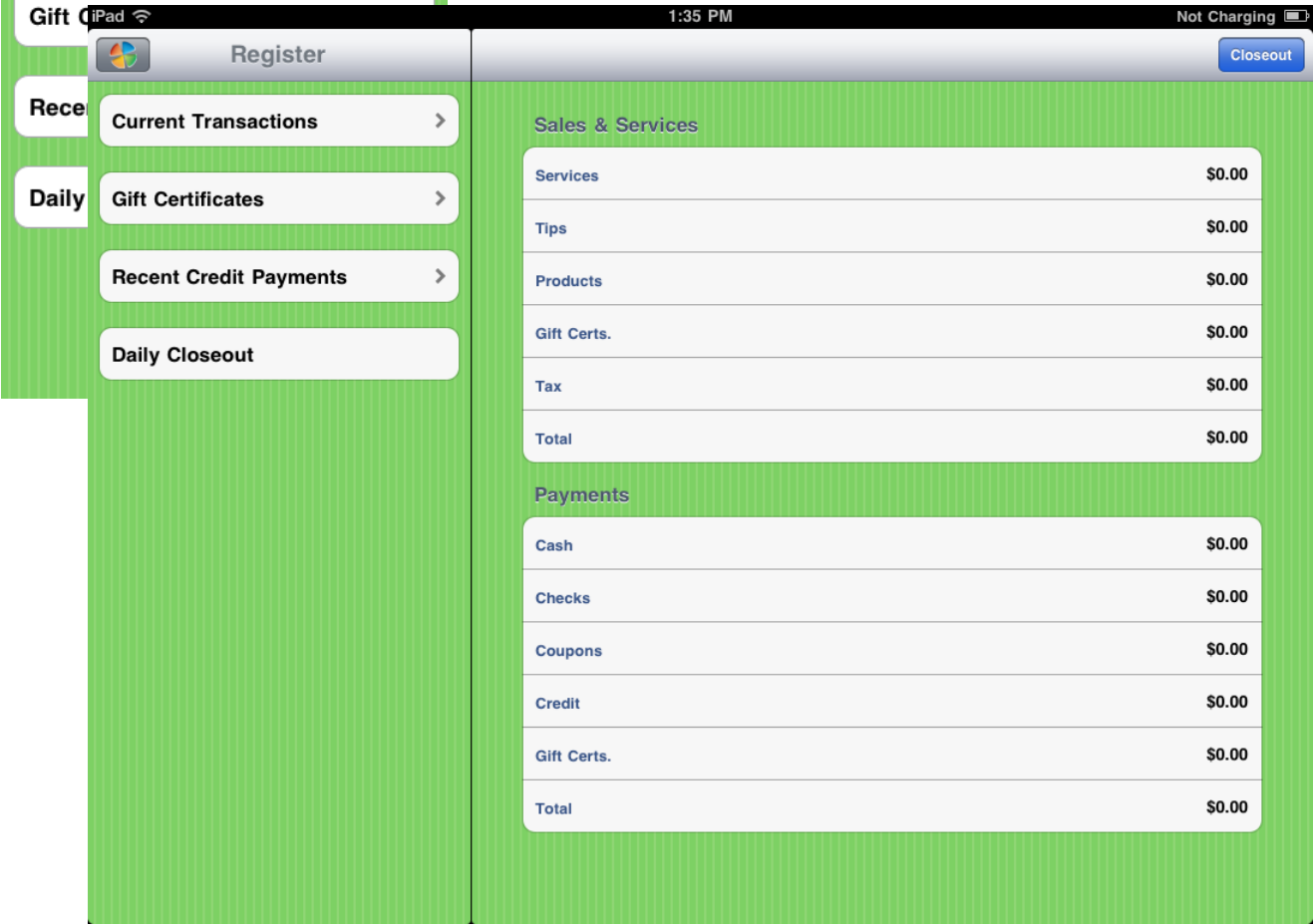


Overview

The REGISTER section of PSA provides you with all the tools to check-out your clients for services and products that they would like to purchase. Also, the REGISTER allows you to sell Gift Certificates to Clients. The REGISTER will keep track of all Gift Certificates purchased in the Check-Out process and automatically decrease their value as Clients use their gift certificates as payments for Services or Products.



iPhone & iPod Screen



iPad Enhanced Screen

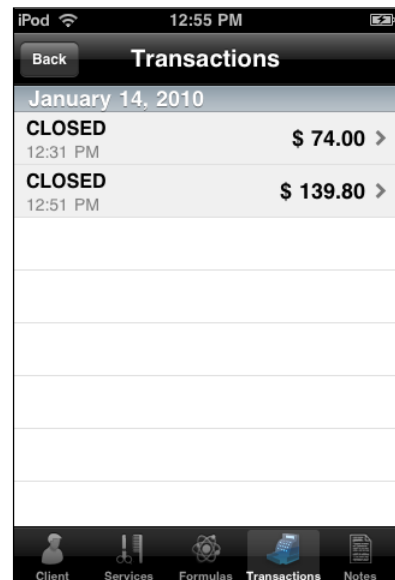
The REGISTER has the DAILY CLOSEOUT. Once you are finished for the day, you will select DAILY CLOSEOUT. Periodically during the day, you may check the DAILY CLOSEOUT for your totals. Do not touch CLOSEOUT button until you are ready to close out for the day.

The REGISTER also allows you to view previously made transactions after the last Daily Closeout. Transactions are always listed in the date order that they were processed. At any point, you may VOID transactions as necessary.

Recent Credit Payments will show you any actual Credit Card Transactions that were processed by the Payment Gateway.

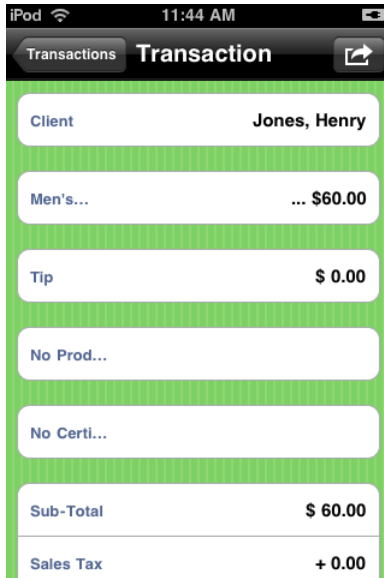
Once you have processed all the transactions for a particular day, you will select DAILY CLOSEOUT. Transactions will be permanently marked as „CLOSED“ on the day you did the DAILY CLOSEOUT. Also, totals are cleared for the next day to start at zero. You may CLOSEOUT more than one time a day if that is convenient for you.

The REGISTER will create all your history for your Clients. Every transaction made for a Client through the REGISTER app will show up in the CLIENT app. You can view all the services and products purchased by the Client as well as view the tip they gave you on their last visit.



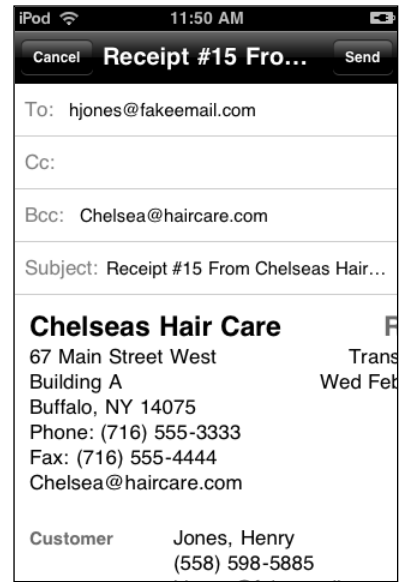
To view TRANSACTIONS for a client, select the TRANSACTIONS tab in the CLIENT section. You may then go into each transaction for the client and view the history of purchases. →

When you are on the Transactions screen, a new feature has been added to allow you to resend email receipts to your Clients. When in the Register, go to Current Transactions and select the transaction you would like to resend a receipt for.



← Touch Email Button
The touch SEND →

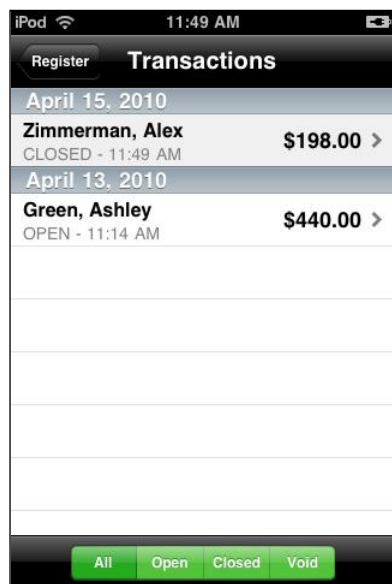
You can resend receipts for
any CLOSED transaction.



Current Transactions

The Current Transactions button of the Register allows you to view all OPEN transactions (no payments), all CLOSED transactions (have full payments) since last Daily Closeout. Remember, the Closed transactions will move to history after you do the Daily Closeout.

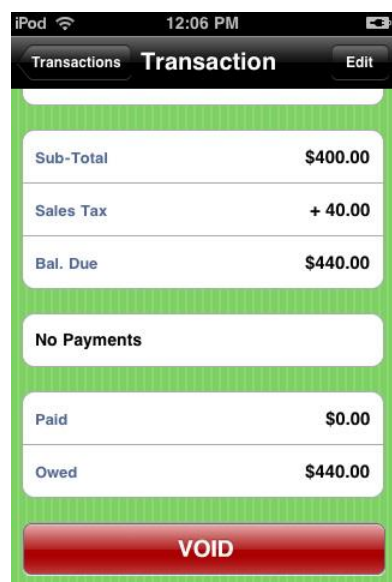
In the Current Transactions feature, you may EDIT Open Transactions with Payments by selecting the open transaction from the screen. Also, you may VOID any OPEN or CLOSED transactions that display. If you VOID a Transaction, the payment is automatically deleted.



← CLOSED transaction

← OPEN transaction

← Notice that you may sort through your Transactions by selecting either ALL, OPEN, CLOSED OR VOID.



Note: You can NOT change a Clients Name from a Transaction in EDIT MODE if there is a Credit Card Payment on the Transaction.

← Void Transaction button

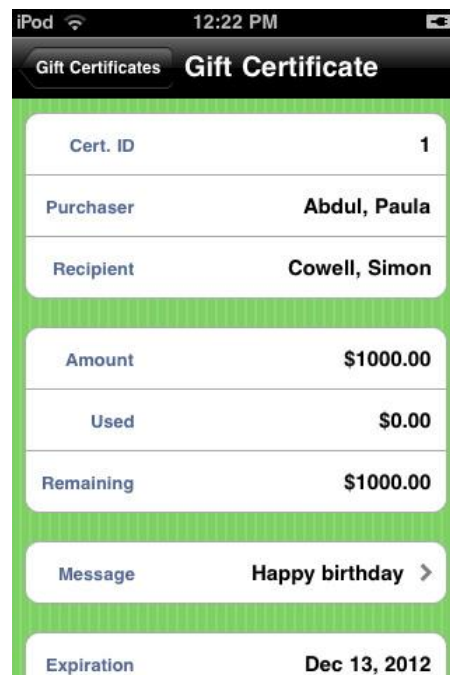
Gift Certificates

Earlier, we showed you how to purchase a Gift Certificate using the New Transaction function. The Gift Certificates button in the Register is used only to view Gift Certificates that have been previously purchased.

The screen below displays the list of Gift Certificates previously purchased.



← Touch the Gift Certificate listed to view the entire Gift Certificate and the balance remaining on the Gift Certificate.



NOTE: Also see in this chapter: Selling & Redeeming Gift Certificates

Recent Credit Card Payments

This function is used to display any credit card payments processed since the last Daily Closeout.

June 1, 2010		
Allenson, Jacob APPROVED - 3:56 PM	\$30.00	>
Abs, Abby VOIDED - 3:46 PM	\$144.99	>
Abs, Abby VOIDED - 3:37 PM	\$900.00	>
Abs, Abby VOIDED - 3:34 PM	\$200.00	>
Tranny, David VOIDED - 3:17 PM	\$125.00	>
Guest REFUNDED - 3:18 PM	\$15.00	>
Garth, Jenny REFUNDED - 3:18 PM	\$130.24	>
Buddings, Belinda REFUNDED - 3:18 PM	\$188.53	>

Buttons: All, Accepted, Refunded, Voided

If you touch a payment displayed, the screen below will display with the detail from the Credit Card transaction.

Amount: 25.00 Tip: 5.00 Total: \$30.00

Card #: Ending in 0012 Code: ***

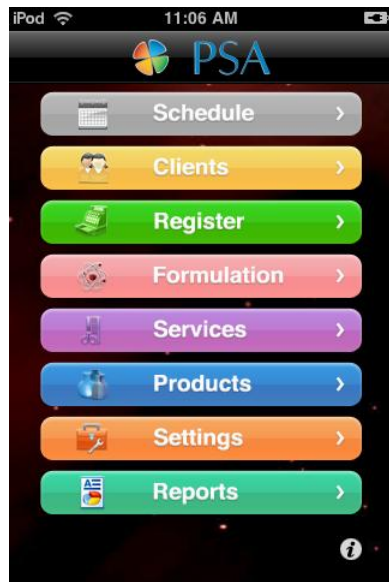
Exp. MM YY Charge

Status: Approved!
Date: June 1, 2010 3:56 PM
Amount: \$ 30.00
Trans. ID: 2153187637

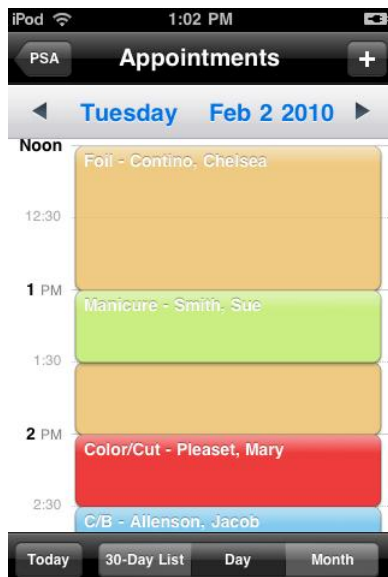
How to Check Out a Client Using Schedule

There are a few ways you can get to the REGISTER in order to CHECK OUT a client. The easiest way to CHECKOUT a Client is to go to the Client's scheduled appointment in the SCHEDULE app and scroll to the bottom of the appointment screen. You will see the **Check Out** button. Simply touch the button and you will be transferred to the REGISTER app to a transaction all ready with the client services that were scheduled included in the transaction window.

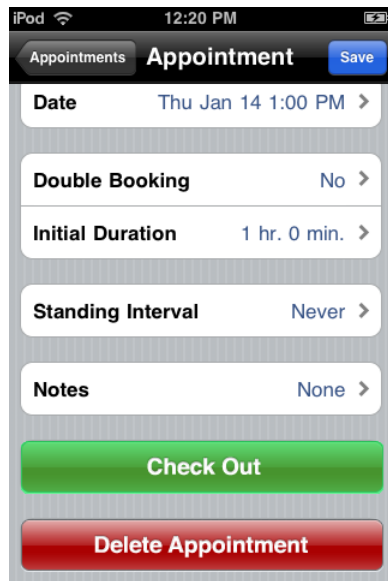
STEP 1 Open SCHEDULE app from PSA main menu



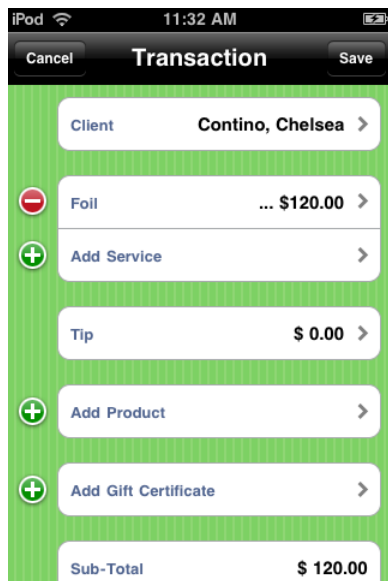
STEP 2 Select appointment to Check Out by touching appointment



STEP 3 Scroll down to the bottom of the appointment screen and touch Check Out button



STEP 4 The Service that was scheduled for the Client automatically displays in the Transaction window.

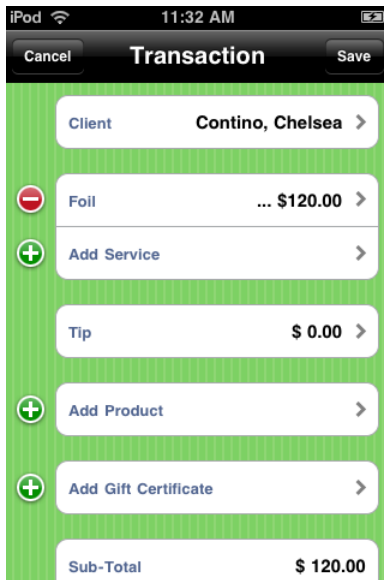


To DELETE the Service from the Transaction, touch Red Minus button to the left of the service displayed that you would like to delete.

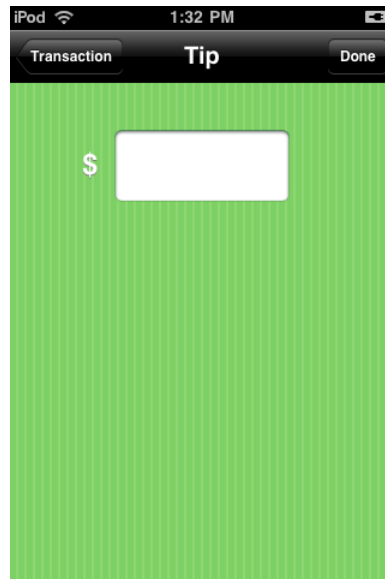
To ADD a SERVICE to this Transactions, swipe the Add Service button. The Services screen will display for you to add any listed Service to the Transaction. You may Check Out for multiple services.

To ADD a PRODUCT to this Transaction, swipe to the right the Add Product button. You may add multiple products to the Transaction by repeating this step until all Products purchased are displayed on the transaction.

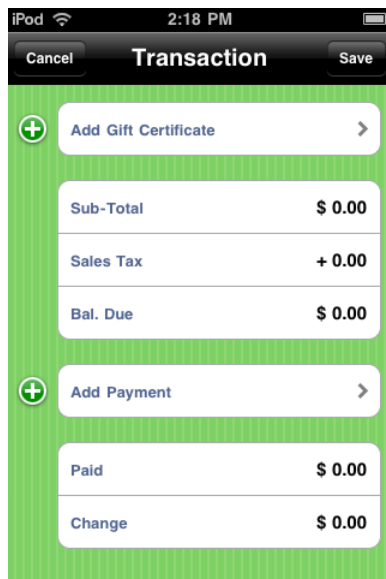
STEP 5 Add a TIP to your Transaction



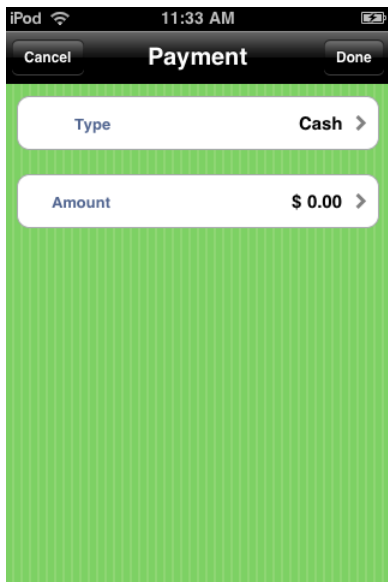
To ADD a TIP, touch Tip button and enter a dollar amount and touch **Done** button in upper right hand corner.



STEP 6 Entering Payments

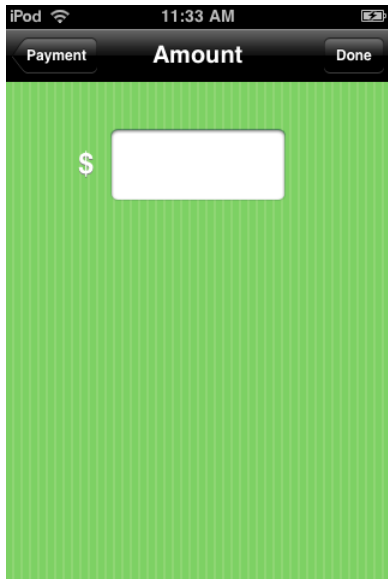
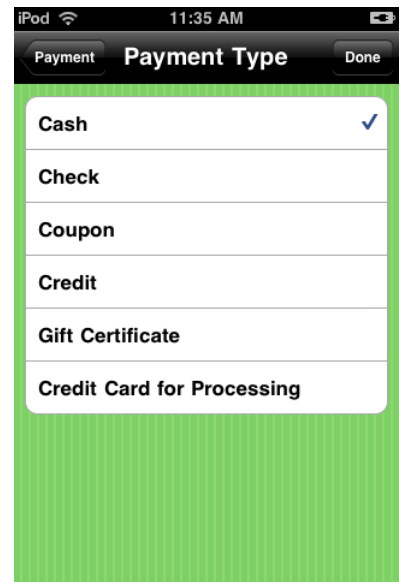


→ To ADD a Payment, touch Add Payment button.



Select a Type of Payment by touching Type. Available payment types are: Cash, Check, Coupon, Credit, or Gift Certificate

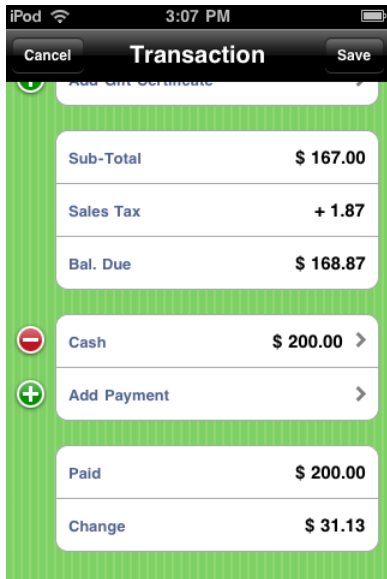
You may only use Credit Card for Processing if you have signed up with Authorize.Net for the Service (see Chapter 10)



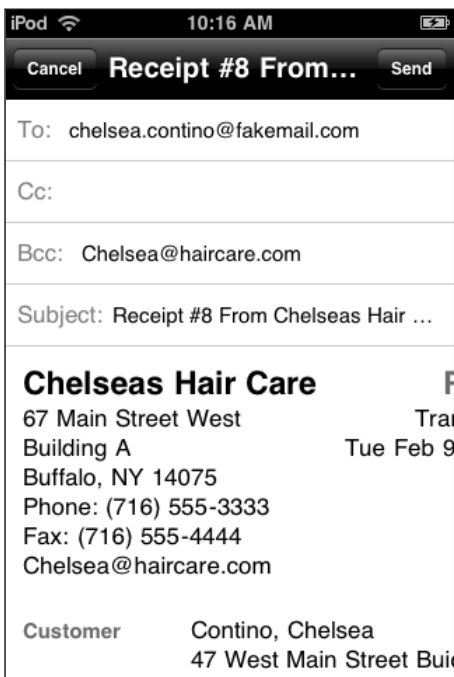
To enter a Payment Amount, touch Amount and the screen below will appear for you to enter a dollar amount for the Payment

Once you have entered a Payment Amount, the screen below will appear with your totals including any Sales Tax to be charged. This screen will also indicate if you owe any change back to your customers in the window labeled: Change.

STEP 7 You must **SAVE** the transaction when completed by touching **Save Button** in upper right hand corner of Transaction screen. Your transaction is now complete and if payment is complete, your transaction is CLOSED. If the Client has not payed in full, the transaction will remain OPEN.



STEP 8 When you are completed with the transaction, the screen below will appear asking you if you want to email the receipt. From this screen, you can either cancel emailing of the receipt to the customer or send receipt to customer. In order to be able to email receipts to your customer, always confirm their email address during any services you perform for them.

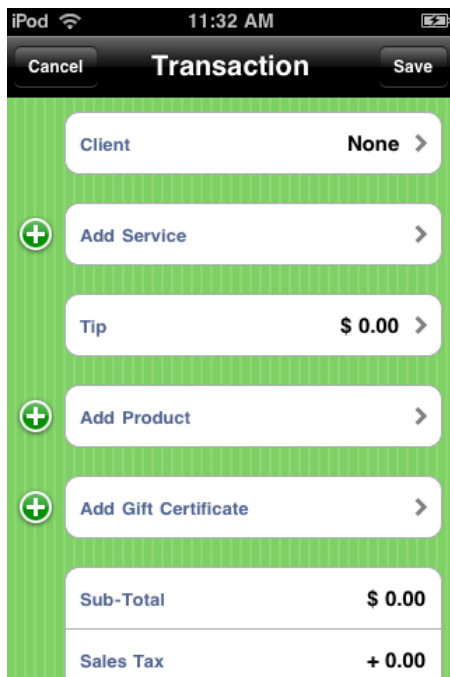


To Email a Receipt to your customer, touch Send button

To Cancel Emailing a Receipt to your customer, touch Cancel button.

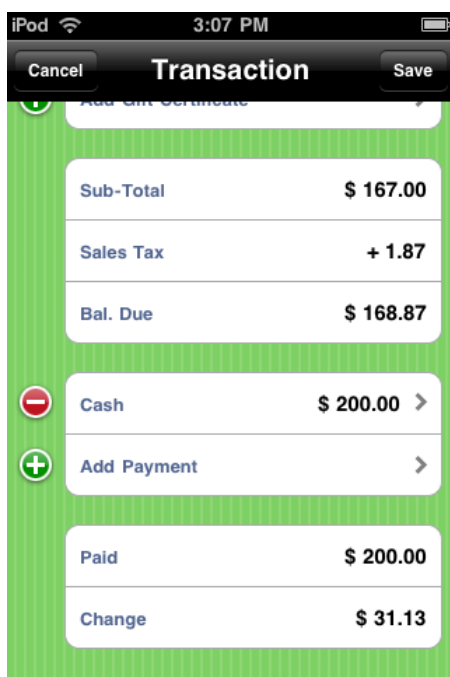
How To Check Out Using New Transaction

As indicated earlier in this chapter, there are a few different ways to check out a Client. The first method was using the Schedule. The second method to check out a Client is the New Transaction function in the Register. The only drawback of using the New Transaction function is that you have to manually add the Client and Services to the transaction. If you check out a Client from the Schedule, the Client name and Service performed is automatically transferred to the transaction.



As seen here, just begin your transaction by starting at the top and entering the Client. If you do not want to attach the transaction to a Client, you can use the 'Guest' client that appears in your client list.

Add Services, Products, Tips and Gift Certificate sales. After you are done, the transaction will subtotal and tax any taxable products & services giving you a Balance Due.



SAVE

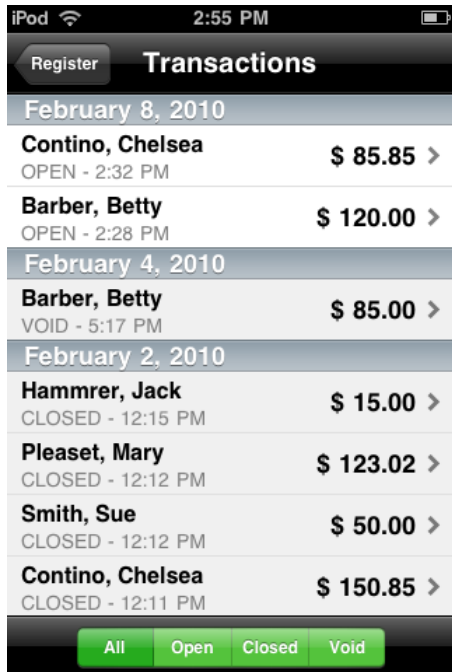
Once you have the balance due, enter Payment information by touching the 'Add Payment' button.

The payment data will be calculated if you use more than one payment type. The transaction will automatically calculate any Change that needs to be returned to Client.

When you are happy with the transaction, touch **SAVE** in the upper right hand corner of the New Transaction Screen. If you do NOT use the SAVE

option, your transaction will not be saved.

Transactions – Open, Closed & Voided



Register Transactions	
February 8, 2010	
Contino, Chelsea OPEN - 2:32 PM	\$ 85.85 >
Barber, Betty OPEN - 2:28 PM	\$ 120.00 >
February 4, 2010	
Barber, Betty VOID - 5:17 PM	\$ 85.00 >
February 2, 2010	
Hammrer, Jack CLOSED - 12:15 PM	\$ 15.00 >
Pleaset, Mary CLOSED - 12:12 PM	\$ 123.02 >
Smith, Sue CLOSED - 12:12 PM	\$ 50.00 >
Contino, Chelsea CLOSED - 12:11 PM	\$ 150.85 >

There are three statuses of Transactions:

- Open
- Closed
- Voided

Open Transactions

An OPEN transaction is a transaction in which you have attempted to Check Out your Client, but you touched SAVE before entering complete payment information for Service & Products purchased. If a transaction does have a payment listed but that payment does not cover the entire billing transaction, the transaction will remain OPEN.

At any time, you may display your transactions, open, closed and voided using the Current Transactions function in the Register App. To EDIT an OPEN transaction, simply touch the transaction in Current Transactions and when the Transaction is displayed, you can touch the EDIT button and revise the Transaction.

**** Note:** If you leave a transaction OPEN and do the Daily Closeout, that OPEN transaction will automatically be changed to the CLOSED status without the Payment. At that point, the only thing you can do is VOID the transaction and re-enter a new transaction with the completed information.

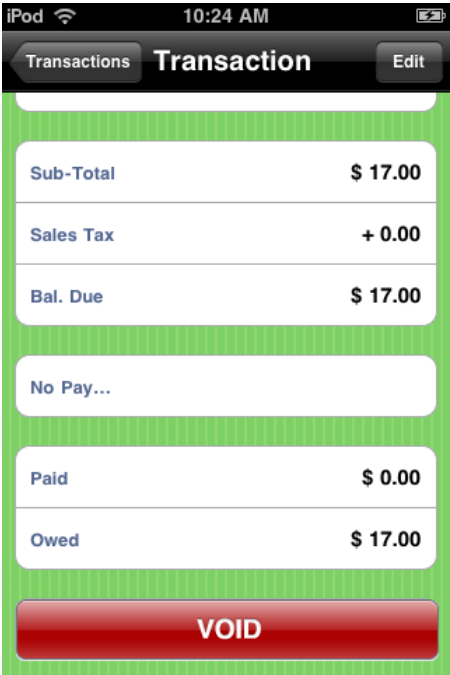
**** Note:** You may NOT change the date of a transaction

Closed Transactions

A CLOSED transaction is a completed transaction; in other words, your Client has been invoiced for Services & Products and has made Payment in Full for the Invoice. If for any reason you need to delete the transaction, use the VOID transaction option described later in this chapter.

Voided Transactions

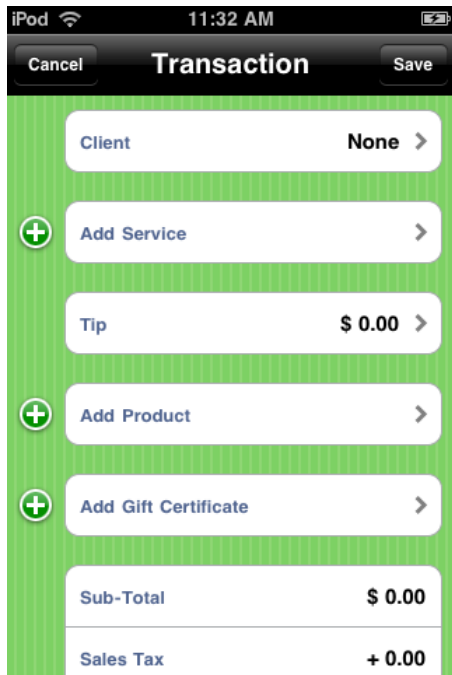
A VOIDED transaction occurs when you view a previously entered transaction, whether Open or Closed, and you choose to Void it by hitting the large red VOID button at the bottom of the transaction screen. Voiding a transaction is just like deleting the transaction. During the Daily Closeout function, Voided transactions will be permanently deleted.



→ To VOID a transaction, touch VOID button

How to Sell Gift Certificates

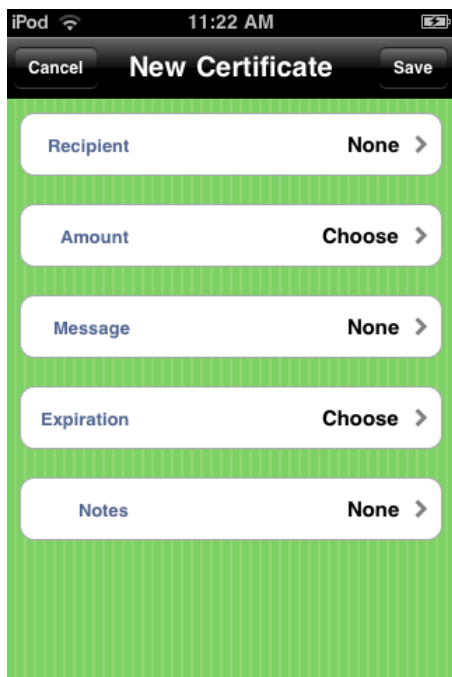
The Register App is where you can sell and redeem Gift Certificates. To sell a Gift Certificate, you can either start a New Transaction or you can put the Gift Certificate directly on your Clients bill in the Check Out function.



To add a Gift Certificate to any transaction as a sale item, simple touch the Add Gift Certificate button in the Transaction screen.

← To ADD a Gift Certificate, touch Add Gift Certificate button

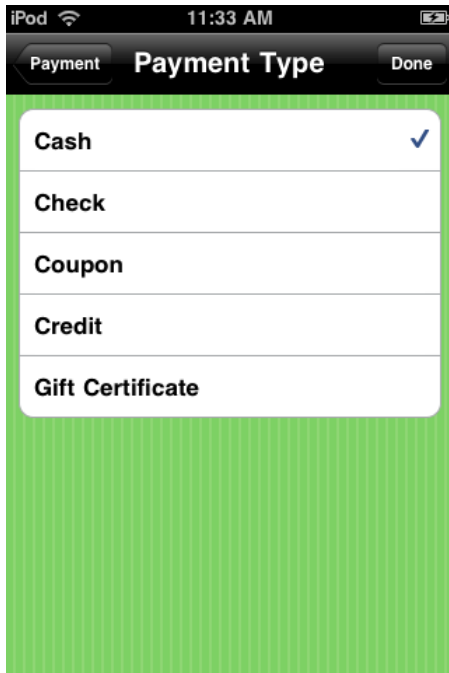
Once you choose to add a Gift Certificate to a Transaction, the screen below will display allowing you to enter the information needed to process a Gift Certificate.



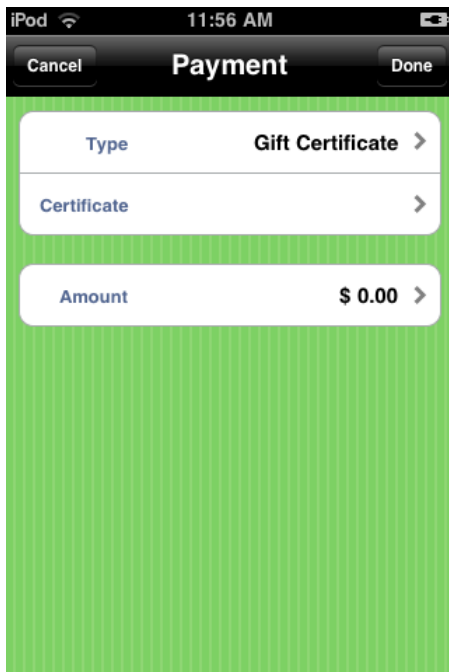
Enter: The Recipients Name, dollar amount of Gift Certificate, any message you want displayed on Gift Certificate and an Expiration Date for the Gift Certificate. Optionally, you may enter some notes regarding the Gift Certificate. The Notes portion of the Gift Certificate is private and will not print on the Gift Certificate.

How to Redeem Gift Certificates

The Register App is where you can utilize a previously sold Gift Certificate as payment towards a Clients Services & Products. To use a Gift Certificate as part or all of a payment, select the Payments button in the Transaction, and select Gift Certificate as payment type.



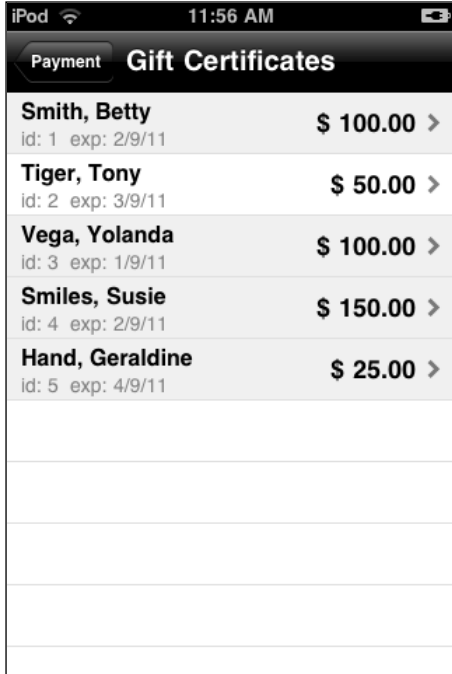
← Select GIFT CERTIFICATE to redeem a Gift Certificate



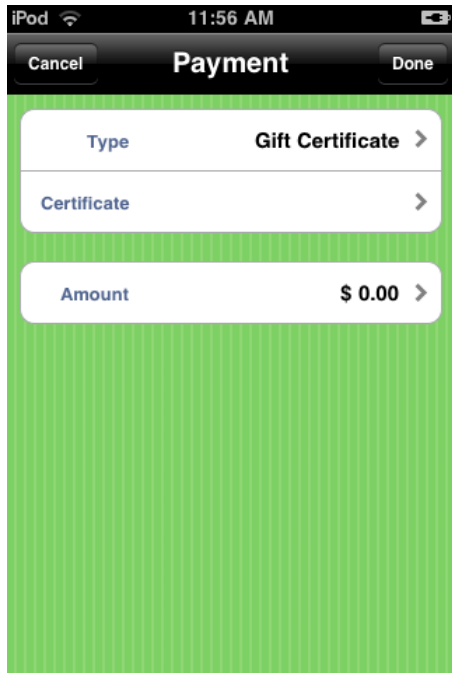
When you select Gift Certificate as payment method, the screen to the left will appear. At this point, you need to indicate which Gift Certificate is being redeemed.

← Touch Certificate button to view Gift Certificates that have been issued.

Now, you must select which Gift Certificate is being redeemed using the list on the screen.



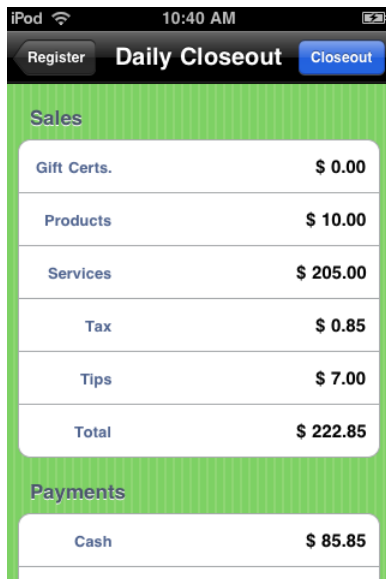
This screen will only display the redeemable value left on a Gift Certificate. If a Gift Certificate has been fully redeemed, a value of zero will display. If a Gift Certificate has been previously redeemed for less than the entire amount, the balance remaining on the Gift Certificate will display.



The last thing that you need to do to use a Gift Certificate as payment is to indicate the amount of money they are applying against the Gift Certificate. It is NOT necessary to redeem the entire dollar amount of the Gift Certificate all at once. You may simply apply any amount of money available on the Gift Certificate.

Daily Closeout

The Daily Closeout totals all your transactions since the last Daily Closeout and puts this information into a handy report for future reference. In this report, you can clearly see the detail for your Sales and Payments. You may go into the Daily Closeout function multiple times in a day to just view your totals. Until you hit the blue **CLOSEOUT** button in this function, totals will continue to accumulate.



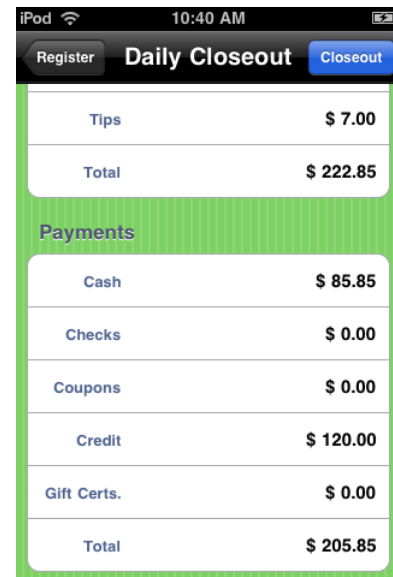
The screenshot shows the 'Daily Closeout' screen with a 'Closeout' button in the top right. The 'Sales' section is highlighted in green and includes a table with the following items:

Sales	
Gift Certs.	\$ 0.00
Products	\$ 10.00
Services	\$ 205.00
Tax	\$ 0.85
Tips	\$ 7.00
Total	\$ 222.85

The 'Payments' section is also visible below the sales table, with a table containing:

Payments	
Cash	\$ 85.85

← To CLOSEOUT for the day, touch CLOSEOUT



The screenshot shows the 'Daily Closeout' screen with a 'Closeout' button in the top right. The 'Tips' section is highlighted in green and includes a table with the following items:

Tips	
Tips	\$ 7.00
Total	\$ 222.85

The 'Payments' section is also visible below the tips table, with a table containing:

Payments	
Cash	\$ 85.85
Checks	\$ 0.00
Coupons	\$ 0.00
Credit	\$ 120.00
Gift Certs.	\$ 0.00
Total	\$ 205.85

Most stylists choose to do their Daily Closeout everyday at the end of their business day. Before running the Daily Closeout, it is very important to close any OPEN transactions.

After you have run the Daily Closeout, your Current Transactions should be a blank screen. You may print out the Daily Closeout from the Reports App.

Chapter 9 - Reports

Chapter

9

The Reports App allows you to print various reports using the information already entered into your PSA. All reports can be displayed on your devices screen; but, for easier reading, we allow you to email the reports to your company's email address as stated in the SETTINGS app.

The Reports App has six different report and samples of these reports can be found in the next few pages.

The image displays three screenshots from the Reports App on an iPad. The top screenshot shows the 'Reports' menu with options like 'Closeout History', 'Closeout Totals', 'Product History', 'Product Inventory', 'Credit Payments', and 'Transaction History'. The middle screenshot shows the 'Closeout Totals' report being shared via email, with fields for 'To:', 'Cc/Bcc, From: chasinzinna@gmail.com', and 'Subject: Closeout Totals'. The bottom screenshot shows the 'Report Range' screen with a date selector and a 'Generate' button.

Closeout Totals Report Content:

Closeout Totals
Start Date: None
End Date: None

Sales		Payments	
Services	\$0.00	Cash	\$0.00
Tips	\$0.00	Checks	\$0.00
Products	\$0.00	Coupons	\$0.00
	\$0.00	Credit	\$0.00
	\$0.00	Gift Certificates	\$0.00
	\$0.00	Total	\$0.00

Total Difference: \$0.00

Date Selector:

November	27	2008
December	28	2009
January	29	2010
February	30	2011
March	31	2012

Most reports can be printed using a date span or choosing an individual day.

To generate a report, select the report and select a date or date span. If you would like your entire history in the report, turn Entire History button to 'ON'. At that point, a date is not required.

If you would like a report for just one day, enter the same day in the Start and End areas.

If you would like a report for a date span, touch START and select a date, then touch END and select a date.

When you have made your date selection, touch the **GENERATE** button in upper right hand corner.

Closeout History Report

When you generate a CLOSEOUT HISTORY report, the following screen will display:



Date	Time	Value
February 11, 2010	2:18 PM	\$ 1122.85
February 2, 2010	12:16 PM	\$ 338.87

On this screen, you will pick the Closeout Date for the report that you would like by touching the date. You may scroll down to see more dates. Dates are sorted newest to oldest.

The Daily Closeout Report will first appear on your device. If you would like to print the report out, use the EMAIL icon in the upper right hand corner of the screen. Your report will by default email to your company's email address as setup in Settings.

Sales	
Services	\$ 265.00
Tips	\$ 50.00
Products	\$ 22.00
Gift Certs.	\$ 0.00
Tax	\$ 1.87
Total	\$ 338.87

Payments	
Cash	\$ 88.02

Tax	\$ 1.87
Total	\$ 338.87

Payments	
Cash	\$ 88.02
Checks	\$ 50.00
Coupons	\$ 0.00
Credit	\$ 200.85
Gift Certs.	\$ 0.00
Total	\$ 338.87

When you click on the EMAIL button, the following screen will display:

Cancel **Salon Exceptional Closeout Totals** Send

To: lisac@salontechnologies.com

Cc/Bcc:

Subject: Salon Exceptional Closeout Totals

Salon Exceptional **Closeout Totals**
 67 Main Street West Start Date: Tue Feb 12:11
 Building A End Date: Tue Feb 12:15
 Buffalo, NY 14075
 Phone: (716) 555-3333
 Fax: (716) 555-4444
 lisac@salontechnologies.com

Sales	Payments
Services	Cash

You can scroll around this screen and you can touch the SEND button and the report will go to your email. Once received in Email, you can print out the report for your records.

Closeout Totals (Consolidated)

The Closeout Totals (Consolidated) Report is very similar to Closeout History with the exception that you can print totals for a date range. For instance, instead of just printing out one day, you can select to print a day, week, month, year, etc. The report will combine all totals for all days selected.

This report can be very useful to determine any Sales Tax that you have received through purchases.

Product History Report

The Product History Report shows all Inventory transactions for a given time span or date. With this report, you can easily see the status of your Inventory. This report is also emailable by hitting the EMAIL button in the upper right hand corner.



Product Name	Quantity Change
Max Control Gel 2/8/10 - Sold As Retail	- 1
Extreme Max Hold 2/2/10 - Sold As Retail	- 1
Light Gel 2/2/10 - Sold As Retail	- 1
Hair Accessories 2/2/10 - Added To Inventory	+ 10
Cleane Rinse Shampoo 2/2/10 - Added To Inventory	+ 25
Extreme Max Hold 2/2/10 - Added To Inventory	+ 25
Barely There Hair Spray 2/2/10 - Added To Inventory	+ 30
Light Gel 2/2/10 - Added To Inventory	+ 30
Max Control Gel 2/2/10 - Added To Inventory	+ 25
Extreme Moisture Condi...	+ 05

Product Inventory Report

The Product Inventory Report lists your Products Inventory status. You can easily see where a product needs to be reordered. By touching the product, you can view Product Information & Vendor Information for ordering.

Product Name	Min.	Current	Max.	
Conditioner				
Extreme Moisture Conditioner	10	25	25	>
Sensitive Skin Conditioner	0	0	0	>
Gel				
Max Control Gel	10	24	25	>
Light Gel	10	29	30	>
Hairspray				
Barely There Hair Spray	10	30	30	>
Extreme Max Hold	10	24	25	>

Credit Payments History Report

The Credit Payments History Report lists all credit card processed transactions. The newest transaction is on the top of the screen and the oldest at the bottom.

June 1, 2010	
Allenson, Jacob APPROVED - 3:56 PM	\$30.00 >
Abs, Abby VOIDED - 3:46 PM	\$144.99 >
Abs, Abby VOIDED - 3:37 PM	\$900.00 >
Abs, Abby APPROVED - 3:33 PM	\$1.00 >
Abs, Abby VOIDED - 3:34 PM	\$200.00 >
Abs, Abby APPROVED - 3:30 PM	\$30.06 >
Tranny, David VOIDED - 3:17 PM	\$125.00 >
Allenson, Jacob APPROVED - 3:12 PM	\$44.00 >

← You may touch a Credit Payment and view the entire transaction as shown below.

Credit Payments **Credit**

Amount: 25.00 Tip: 5.00 Total: \$30.00

Card #: Ending in 0012 Code: ***

Exp. MM YY Charge

Status: Approved!
Date: June 1, 2010 3:56 PM
Amount: \$ 30.00
Trans. ID: 2153187637

Transaction History Report

The Transaction History Report is used to view or print your transactions after you have done the Daily Closeout. The Daily Closeout moves all transactions to History.

From this option, you can view the entire receipt for a client or you can email a copy of the receipt to the client again. You may also VOID a transaction in this option. Once you VOID a transaction, your Daily Closeout totals will change so you might want to reprint the report for your records.

The screenshot shows a mobile application interface for a Transaction History Report. At the top, it displays 'iPod' and '3:39 PM'. Below the status bar, there is a 'Report Range' button and a 'Transactions' title with a share icon. The report is organized by date, with sections for 'February 10, 2010' and 'February 9, 2010'. Each transaction entry includes the client name, the amount, and the time the transaction was closed. At the bottom of the screen, there are four buttons: 'All', 'Open', 'Closed', and 'Void'.

Date	Client Name	Amount	Time
February 10, 2010	Allenson, Jacob	\$ 25.00	CLOSED - 11:37 AM
	Allenson, Jacob	\$ 45.00	CLOSED - 11:34 AM
	Barber, Betty	\$ 75.00	CLOSED - 11:32 AM
	Jones, Henry	\$ 60.00	CLOSED - 11:31 AM
	Allenson, Jacob	\$ 17.00	CLOSED - 11:30 AM
February 9, 2010	Barber, Betty	\$ 120.00	CLOSED - 12:10 PM
	Guest	\$ 25.00	CLOSED - 11:50 AM
	Frost, Jack	\$ 150.00	

Chapter 10 - Credit Card Processing



Overview

Processing Credit Card transactions in the PSA app is completely **optional**. The following chapter will describe the changes you need to make in the setup of your PSA.

First, you need to ensure that you have a connection to the internet from your device. If you have an iPod Touch or iPad, make sure your WiFi is connected.

Before setting up Credit Card Processing in the PSA app, you must sign up with either NetPay or Authorize.Net for the service.

We prefer that you use NETPAY because there are no SETUP fees involved. NetPay will take your information and provide you with the appropriate API Login & Transaction Key for processing through the credit card gateway.

How to Contact NetPay

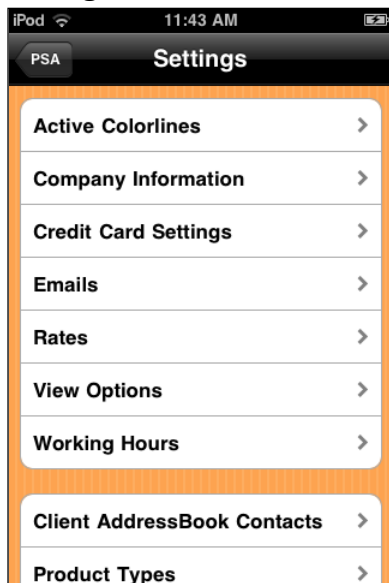
<http://www.netpaybankcard.com/admin/onlineapplication.php?mid=32>

If you already use Authorize.Net, contact them using the following link:

<http://reseller.authorize.net/application/?id=5553696>

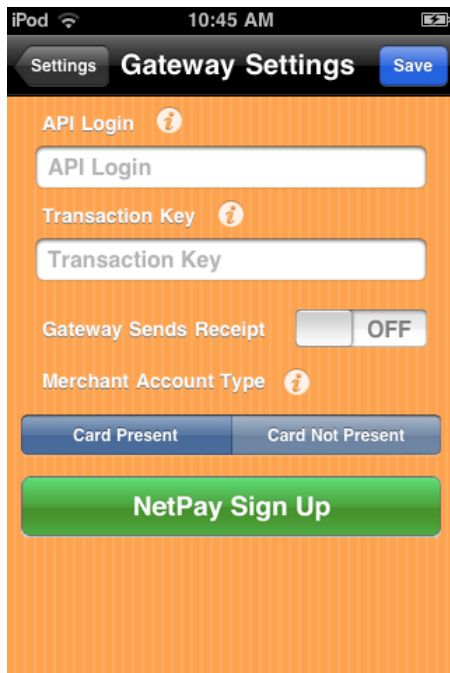
Update Credit Card Settings in Settings Module

Once you have signed up for the service on NetPay or Authorize.Net, you will be given an **API Login** and a **Transaction Key**. You will need to input these values into the Settings module of PSA under Credit Card Settings as shown in the



screens below:

← Credit Card Settings

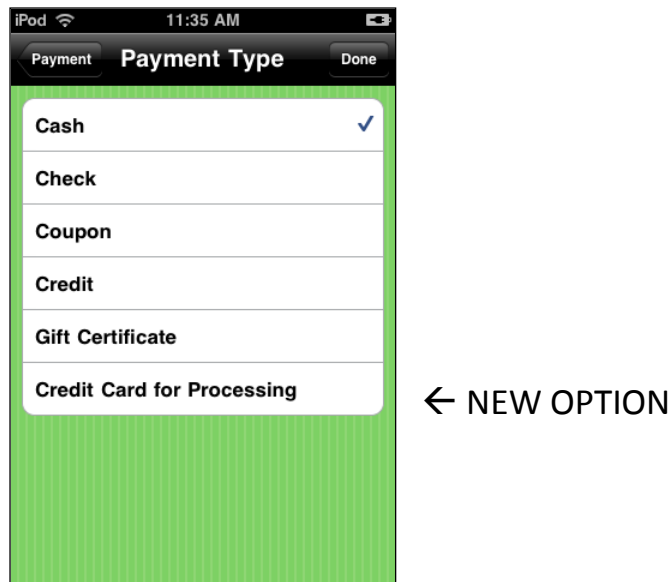


← API Login (Get from Authorize..net)

← Transaction Key (Get from Authorize.net)

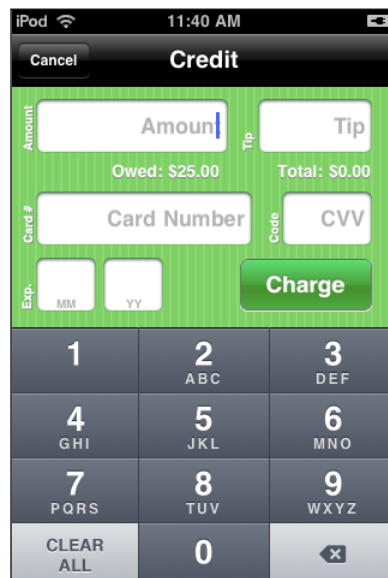
How to Process a Credit Card Payment

After you have inputted all the required settings to process Credit Cards from your device, you will also notice a new PAYMENT type in the Register module.



On the screen above, if you are **NOT** using Credit Card Processing and your Client hands you a credit card, choose **Credit** from the above options. The PSA app will work the usual way.

If you **ARE USING** Credit Card Processing and your Client hands you a credit card, choose **Credit Card for Processing**. After selecting this option, the screen below will display:



To process a Credit Card Payment, you must fill in all of the above fields.

AMOUNT - Enter the total amount due from Customer.

The amount the Client owes for Services & Products is listed just below the Amount box. If you put a tip on previous screen, you do NOT have to enter the tip on this screen.

TIP - You can enter the TIP either in this place or on previous Register screens.

If you enter a Tip on this screen, the Total will be calculated and displayed below the Tip box. If you entered a Tip on previous screen, you do NOT need to enter it here.

Card Number Enter the Credit Card Number as it appears on the card.

CVV - CVV is the security code that appears on the back of your Credit Card in the signature box. Some card have a 3 digit CVV and others have a 4 digit CVV.

Expiration Month - Enter a the Expiration Month from the Credit Card. You may enter any digit from 1 to 12.

Expiration Year - Enter the Expiration Year from the Credit Card. You may enter any digit from 10 thru 99, i.e. 2010 = 10.

CHARGE - Once you have entered all the above information, touch CHARGE

After you have touched the CHARGE button, the transaction will be processed thru your internet connection. You will receive a message back indicating whether or not the transaction was successful. If you receive an error message, correct the information on the charge screen and touch CHARGE again.

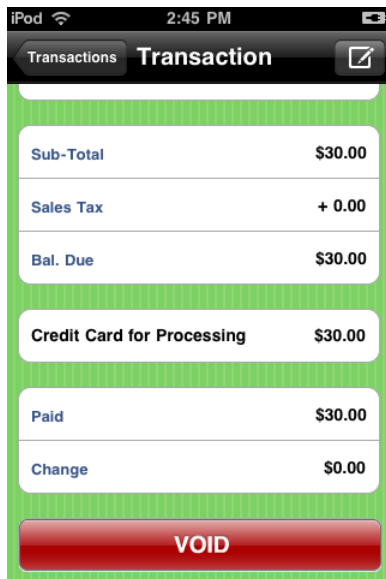
Also, you may use more than one credit card for a Clients transaction. Enter each card as two separate payments.

Refunds & Voids

When processing credit card transactions, you may have instances where you need to

Void a transaction. Anytime you VOID a transaction, the Credit Card Payment is AUTOMATICALLY REFUNDED to your Client's Charge Card.

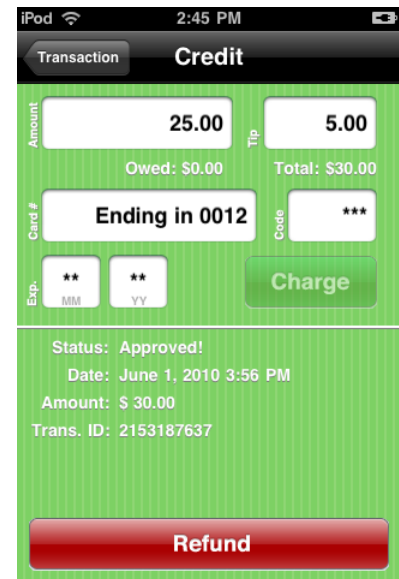
If you need to REFUND a Transaction BEFORE you have run the Daily Closeout, select the transaction in the Register: Current Transactions.



← Touch CC for Processing button and screen to the right displays

← Touch VOID or

Touch REFUND →



It does not matter if you use VOID or REFUND, they both will refund your Customers Credit Card payment.

You cannot use the VOID option after 120 days has passed since the Transaction went through. You must instead use the Authorize.Net web interface.

Authorize.net also provides a very easy user internet interface for checking transactions and printing reports. We do NOT store any Credit Card numbers in your PSA app. All Credit Card Numbers are safely stored in the Authorize.Net system.

Credit Cards Accepted

The following Credit Cards are accepted using the Authorize.Net Credit Card Gateway:

American Express

Discover

Visa

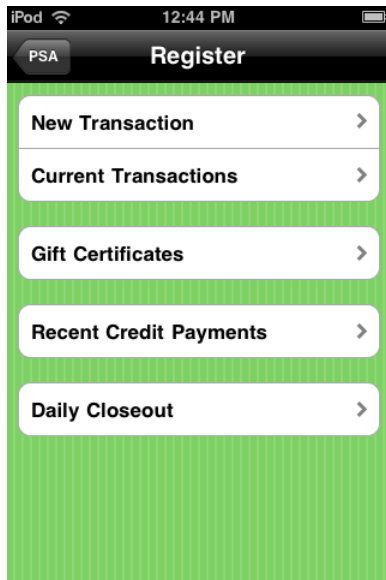
Mastercard

JCB

Diners Club

Credit Card Reporting

In the Register module, you will also find a new feature: Recent Credit Card Payments. This option will list all your Credit Card charges in the order they happen. You may use this option only to view charges. To change any transactions, you must go thru Transaction History.



← NEW OPTION

