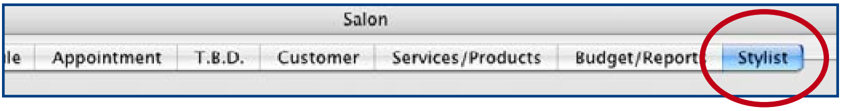
Salon

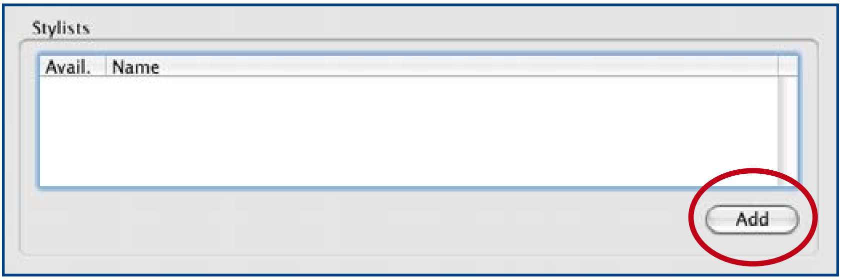
Quick Start Guide

Step 1: Enter a Stylist

Click the “Stylist” tab at the top of the window.



Push the “Add” button.



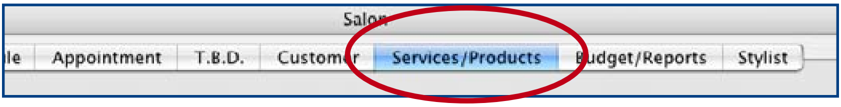
The text “Unnamed” should already be selected for you. Type the name of the stylist you wish to enter.

You can now click outside of the name box, or hit the return key to enter the name.

Salon runs as a two week demo of one stylist if there is no registration code entered. To purchase a registration code to continue using Salon and to be able to enter more stylists, email Scott Siegrist at scott@ss76software.com.

Step 2: Enter Services

Click the “Services/Products” tab at the top of the window.



Push the “Add” button under the services box. Type the name of the service, ex: “Men’s Haircut”, the time to schedule for that service (in minutes), the cost to the customer for that service, and any additional information you wish to include about that service.

Each scheduled appointment shows up on the calendar within a colored box. You have the ability to set a different color for each service, to make it easier to read your appointment calendar at a glance.

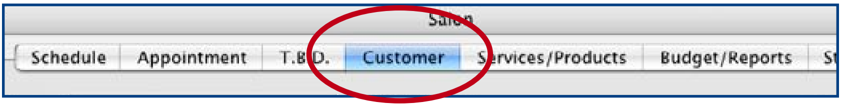
Click the colored box at the end of the row for the service you just entered.

A color picker window will open, allowing you to choose a color for the service. Choose a color and click "OK".

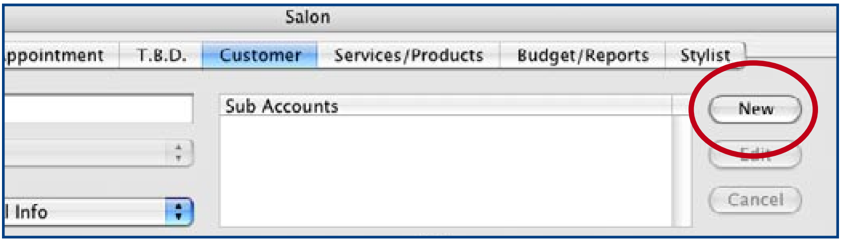
You can continue entering as many services as you like.

Step 3: Enter Customers

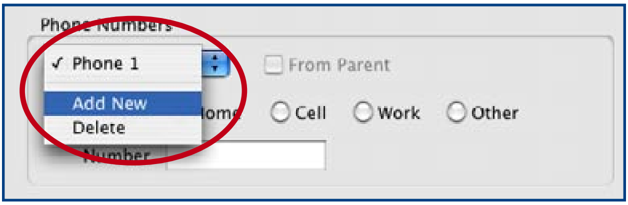
Click the "Customer" tab at the top of the window.



Push the "New" button in the upper right corner of the window.

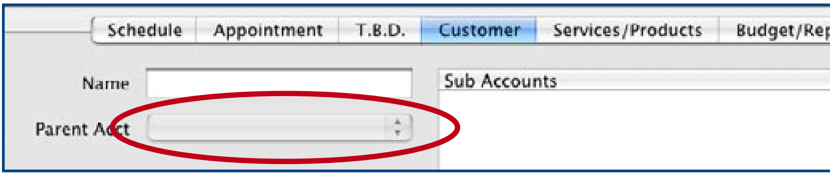


Enter the full name of the customer. Enter a phone number and select what type of phone number it is. You can add as many phone numbers for a customer as are needed by clicking the phone number pull down menu.



Continue entering the customer's information. There are blanks for address, birthday, email, hairstyle information and general information. You may keep the customer's birthday (month and day) to send birthday cards with special offers, etc.

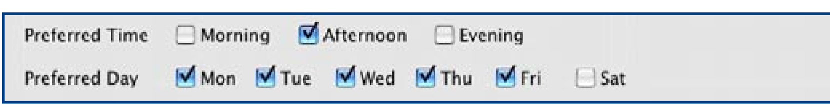
There is a pull down menu for "Parent Account".



You can select a parent account for the new customer you are entering. That way, family information is easier to update and locate. If you choose a parent account, the phone numbers and address from the parent account carry over to the sub-account. You can add phone numbers and an address that are specific to the sub-account if needed.

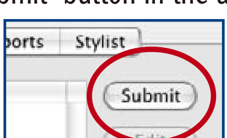
Clicking on the "Personal Info/Appointment History" pull down menu and selecting "Appointment History" brings you to a screen with more information about the customer.

You can enter your customer's preferred times and days for appointments.



This screen is also where you will see your customer's previous appointments and product purchases.

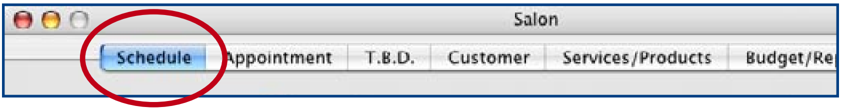
When you are finished entering the information for this customer, push the "Submit" button in the upper right corner of the window.



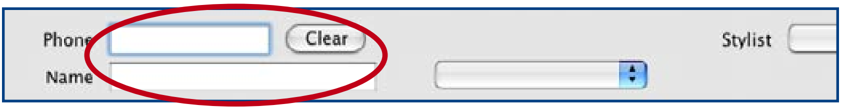
You can continue to enter as many customers as you like.

Step 4: Schedule Appointments

Click the "Schedule" tab at the top of the window.

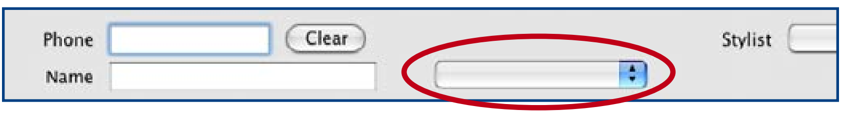


Type in the name or phone number of the customer you wish to schedule.

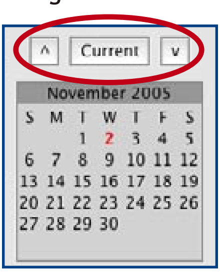


If more than one customer is found with the number or name entered, there is a black triangle to the right of the name blank. Click that trianlge to show a list of the matches and select the customer you wish to schedule.

You could also choose the customer from a list of all of the entered customers using the pull down menu to the right of the customer name blank.

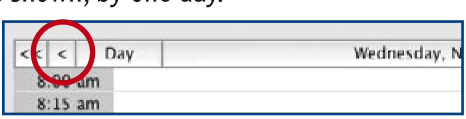


Once your customer is chosen, find the date you wish to schudule. There are a couple of ways to select a date. Click a date on one of the mini calendars on the right.

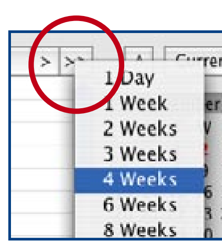


Scroll from month-to-month through the mini calendars using the arrows above them.

Click the single arrows just to the outside of the selected date to change the date shown, by one day.



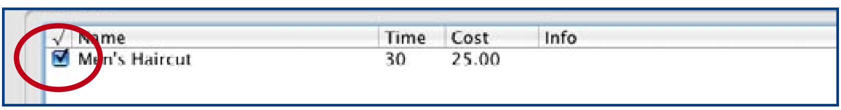
Click on the double arrows outside of the single arrows and select a number of weeks to jump in the calendar.



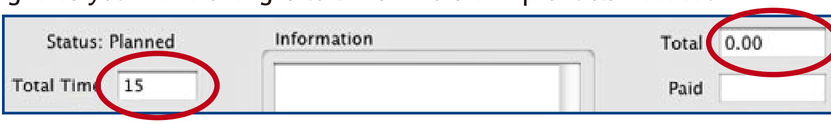
When the calendar is showing the date you need, right click (Control-Click on Macintosh) on the time you need to schedule the appointment for.

Select "Schedule Appointment" from the menu that pops up. This takes you to the appointment tab to enter the information for this appointment.

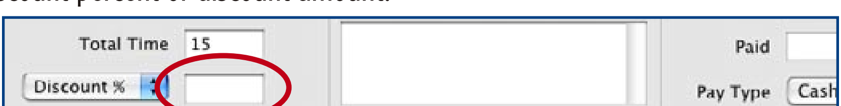
Click the check boxes next to any services needed for this appointment. If you have products entered and know that your customer will be buying certian products at this appointment, click the check boxes next to the needed products also.



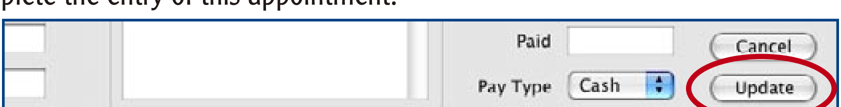
You will see that the "Total Time" and "Total Cost" for the appointment are changed as you make changes to the services and products needed.



You can manually change the time needed or cost by simply typing a new amount in those boxes. You could also change the cost amount by entering a discount percent or discount amount.



Push the "Update" button in the lower right corner of the window to complete the entry of this appointment.

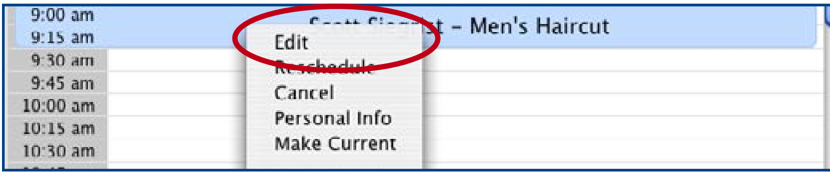


You will now see the appointment that you have entered showing on the calendar.

Step 5: Editing an Appointment (Checking Out)

Click the “Schedule” tab at the top of the window.

Right click (Control-Click on Macintosh) on the appointment you wish to edit.



Select “Edit” from the menu that pops up. You are taken to the appointment tab. Make any changes needed. If the customer’s appointment is done and you have been paid, enter an amount in the “Paid” blank and select the type of payment. Push the “Update” button in the lower right corner of the window. If you entered a Paid amount, this appointment is now showing as paid on the calendar.

To reschedule an appointment within the same day, hold down the mouse button on the appointment in the calendar and drag the appointment to the needed time. Release the mouse button and the appointment is moved.

Feel free to contact me with any questions, concerns, feature requests, etc.

ss76 software

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