



# 1-overview

version 13

## 1-overview

### Version 13.04

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## 1-Overview

Welcome to the User Manual for SALONGENIUS.

This file is available electronically under **F1-HELP**; we request that you consider the environment before printing copies of this file.

### Aim of this User Manual

This guide is to explain how the use of SALONGENIUS and what your purchase of the system brings to your business.

From an introduction to the equipment, through starting the system up to the Section Guides and Reports guides, this document should be your first point of call.

### Section Guides

This User Manual is broken down into several sections:

1. Overview (this guide)
2. Appointments
3. Clients
4. Sales
5. Manager
6. Loyalty Schemes
7. Marketing
8. Reports
9. Stock
10. Waiting List Manager
11. FAQ's
12. Training
13. Colleges

Page number include the section number as a prefix e.g. 1-4 is the 4th page in Overview section.

### Introducing SALONGENIUS

In short, it is a Salon Information Management System. It can:

- Manage your diary; booking clients and scheduling staff
- Manage your sales; tracking sales, technical histories and monies
- Manage your stock; check and track stock usage, valuation and ordering
- Manage your promotions; target clients based on specific criteria
- Manage your staff; target staff performance and analyse progress

and much, much more.

### The point of an Information System

#### Data Quality

Why Data Quality? Agreed, surely the Appointment Diary, or at least the Sales screen, are probably the most obvious starting points when introducing SALONGENIUS.

However, nearly all the functions in SALONGENIUS either create or change the data stored and in order for that data to become useful information to build your business, it needs to be "quality" data.

***It is essential that you set standards for data quality for your business and that all of your Team are aware of how it can affect them and/or their clients.***

### Why is quality data important?

Let's imagine a manufacturer brings out a new product. You have received delivery of your first items of that new product but you have not created the Stock Specification record to be used within SALONGENIUS.

How do you sell it to the customer waiting now? Almost certainly you will select in SALONGENIUS a similar product and adjust the price of it to that of the new item; as this works so well you might be tempted to carry on like this some time.

The money's right, so what's wrong?

Correct; the money at the end of the day will balance and if this is all that matters to your business then maybe an electronic till would have been a better investment for you.

**REMEMBER - SALONGENIUS is an Salon Information Management System that can give you much more than a till!**

Your retail reports will indicate you are selling more of the similar product than before although the turnover for this product will change. This may lead you to make future orders based on this usage, resulting in you over-ordering a product that is not selling as well as the reports would have you believe; on top of that you will not order enough of the new item that is more popular, possibly losing you sales!

This is just a simple example; the implications can be even more significant with regard to services, staff wage commission and most importantly, customer care.

### Who in your business is responsible for quality data?

Everyone! Although Reception is the main role that will directly control and affect the quality of the data in the system, it is important that the whole team is aware of how their role interfaces with that of Reception (and other areas) that use SALONGENIUS. In fact it can be covered by a process of good Communication and good Teamwork.

How often do we see clients return to Reception only to be asked "What did you have done today?" At each stage of the clients' visit, staff should hand the client over to the next member of staff and make sure that all relevant information is passed on. That doesn't mean to say this is the only time they can let other members of the team know about significant changes or opportunities to care for that client.

### What data is involved?

This section briefly discusses the two main areas of data:

- SALONGENIUS Data - the basic data setup and configuration of the system
- Client Data - the dynamic client record data, sales data and business transaction data

We will look at each of these areas in turn. If you want more detailed information about these areas of data, please refer to the main sections later in this guide.

### SALONGENIUS Data Quality

How the basic data is configured within the system will have a direct affect on:

- The correct data being used e.g. correct prices and times
- The ease of use of the system e.g. easier selection of Services etc.
- Minimising potential mistakes e.g. restricting who can do which services
- Maximising business analysis e.g. sales of service contributing to correct category

In this section we will look at the various areas of data setup and summarise the relationships between data and the importance of getting it right.

## Pre-installation Data Preparation

Your Distributor will usually have provided a Data Preparation service prior to initial installation of your SALONGENIUS system. This involves a process of collecting information about your business e.g. services, prices, times, staff etc. to permit the creation of a data set that can be used effectively by you from the point of installation.

***If changes are required after installation it remains the responsibility of the salon to make the changes; however your Distributor may be able to assist but might decide to make a charge accordingly.***

### Licence

Your copy of the software will be licenced to your business and will most likely be licenced to your salon name. This can be changed after installation but an administration charge may be levied.

### Staff Data Quality

The important fields on the staff record are those that “link” with other data in SALONGENIUS, although it is recommended to have the staff record as complete as possible as required by your business.

Fundamental fields are the Price Level and Time Level fields; these “link” to the price and time set in the Service records and define the appointment duration and price that normally appear for that staff doing or selling the service.

### Fundamental Data

Since the system is based on appointment and sales data, getting these settings correct directly affect how easy the system is to use most of the time without having to continually adjust times or prices.

Another important field to consider is the Department field; read on through Service Data Quality to find out why.

### Service Data Quality

Service records have several fields, the settings of which should be carefully considered, but no Service record fields should be left blank.

Linked to the Staff record Price Level and Time Level fields are the settings on the Costs & Times page of the Service Record. This defines the prices charged at each Price Level and the appointment durations at each Time Level for that service; as mentioned above this is fundamental to the efficient operation of SALONGENIUS.

### Other important fields are:

- Technical - setting if the sale of this service contributes to Technical or non-technical turnover.
- History- selects the type of Service History record (to allow the recording of technical notes for every sale of that service)

Finally, let's consider the Available to Staff field.

This determines which departments or staff can be booked for the service. Provided staff are set as being a member of the correct department on their staff records, the most common use of the Available to Staff field is to set a service as being available to a Department (i.e. all staff within that department). If this is set correctly, then SALONGENIUS will only present for selection the services available to the member of staff selected, thus preventing mis-bookings and incorrect sales.

## Other SALONGENIUS Data

To conclude this section, consideration should also be given to the following data:

- Appointment Data - setting the Diary hours and Staff hours to reflect your opening times and staff rota
- Stock Data - making sure that you have the correct products, at the correct prices and stock levels
- Course and Package Data - combining service and stock data to meet your customer requirements
- Discounts - maintaining Discount records in line with your marketing and promotional activity will make using and tracking easier
- Gift Vouchers - having correct Gift Records to coincide with your customer service

Please take time to refer to the relevant sections later in this Guide to make sure that you have a good understanding (and know where to refer back to when you need it again in the future) of the data settings and quality.

Having considered the foundations of good standards of quality data in SALONGENIUS, now we will consider the need to continue those standards through the rest of the data that we collect.

## How to choose your clients

It would be nice if you could but you may not always be in that fortunate position. However, you can determine the quality of the data you maintain on your clients.

Your SALONGENIUS system allows you to operate your business at a similar level of client data quality to that of major high street supermarket chains. If your Team collect and maintain the correct data and you will:

- Know where clients live and how to contact them
- Know what services clients like
- Know who clients like to see
- Know what products clients like to use
- Know how much clients spend and how often they visit you

Using the Client Record effectively will enable you to utilise and maintain SALONGENIUS as an Salon Information Management System that is integral to your business.

## Client Personal Data

This is data fundamental to any client service based business and how much or how little you collect will be determined by your client demographics and your marketing plans.

The most popular form of client contact is via mobile phone. This allows SMS reminders to be sent by the Appointment Diary as well as promotional and pro-active communication when required. It is commonly felt to be the most effective because it provides a near instant method of communication, is widely acceptable to clients and is cheap and easy to use.

However, this does not mean that you should ignore the collection of email details and postal mailing details. Even if you do not intend to do a lot of postal marketing, the ability to select clients based on their address can be invaluable.

### **Driving Personal Data Quality**

What details you ask of your client and at what stage varies from business to business. Many salons will request and record minimal details when the New Client books e.g. Title, First and Last names and a contact telephone number (preferably mobile number to allow an SMS reminder).

When that New client arrives steps should be taken to collect more information about that client but care should be taken not to "scare them off" by asking too much, too soon.

The recommended way is to use the Today's Data Quality reports in the Diary to drive your collection of data based on the clients booked in each day.

Salons may also consider incentive schemes to New clients to encourage them to complete the salons' own data collection forms accurately; maybe a monthly draw for New clients only.

### **Data Protection**

Whichever method(s) are used to collect the required information it is important to maintain compliance with any data handling regulations.

***In the UK, the Data Protection Act requires all businesses to comply. This applies not only to the clients' personal data but also to their sales and history data and includes paper records as well as electronic data. Please refer to the Information Commissioner Office website [www.ico.gov.uk](http://www.ico.gov.uk) for current regulations regarding compliance and notification.***



# Getting Started

## Starting the day

### Equipment

If the computer is switched off then:

1. Make sure the other equipment is turned on e.g. screen etc
2. Check you have enough paper in the report printer
3. Check you have enough till rolls
4. Switch the Computer on via the power button

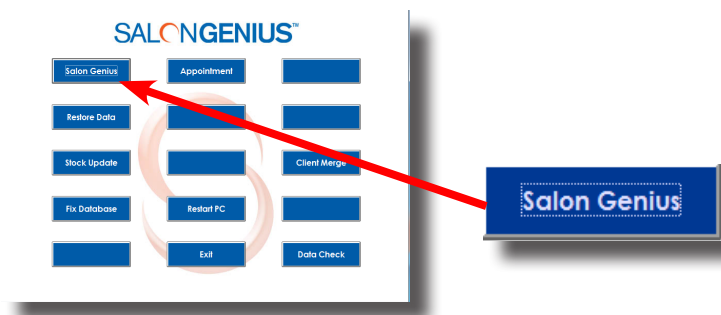
When the Computer is started it proceeds through the operating system start-up screens to eventually come to rest at the SALONGENIUS Switchboard.

If the computer has not been switched off, you need to make sure that the SALONGENIUS Switchboard is visible. To do this double-click on the SALONGENIUS icon.

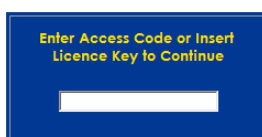


### Starting SALONGENIUS

Select the **SALONGENIUS** button.



### Licence Key Dongle

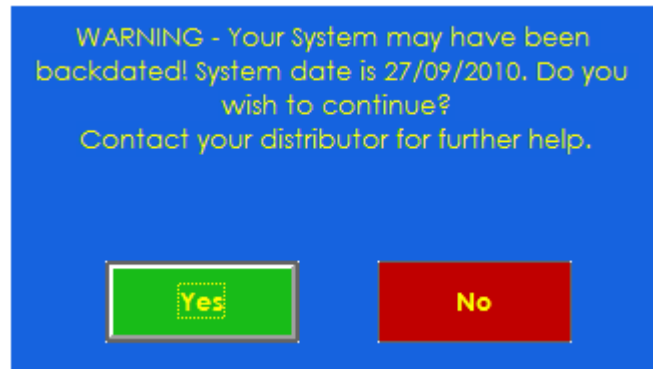


You need to make sure that your Licence Key Dongle is plugged in to the (main) computer.

- **DO's** - Keep it plugged in during the day, Keep it in the Safe at night
- **DON'TS** - Place near speakers, telephones etc., Leave it in the front of the computer or lying around on the desk or **LOCK IT IN THE TILL**
- Just press **ENTER** on the keyboard will start SALONGENIUS in Back-Office mode which is **UNABLE TO TAKE SALES** (sales and If your operator names will be missing). To correct, exit SALONGENIUS and re-start correctly.

## Back Date Warning

If the computer time has been changed the system will warn the user. It is not recommended that the computer date is changed, forward or back.



## Float Entry

If configured as a Till system the Float Entry screen will then be displayed



Entering the Till Float helps Cashing-Up by inputting to SALONGENIUS the amount of cash in the till at the start of the day.

There is **NO DECIMAL POINT**. In the example above, £100.00 is entered as 10000 and then selecting the **ENTER** on the keypad.

## Archive warning

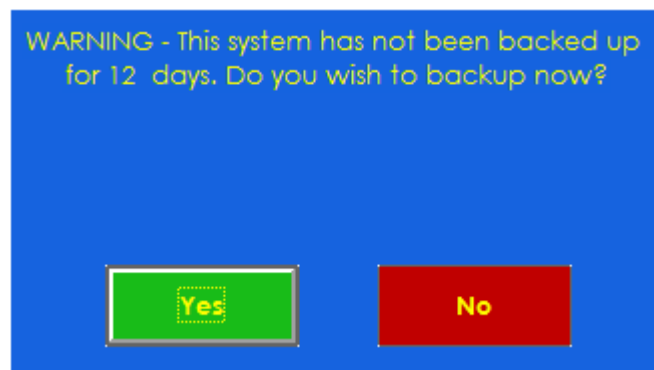
Over time as the data builds up, you will see an **ARCHIVE/PURGE** warning about:

- Sales data older than 2 years
- Client History data older than 2 years
- Client record data for clients who have not returned within the last 2 years
- Appointment data older than 6 months

Select **YES** to view the statistics.

## Backup warning

SALONGENIUS will warn every time it is started when its' data has not been backed-up for 24 hours or more. If you see this warning, assume the SALONGENIUS data has NOT been backed-up and take the time to do it now before you get busy. Select **YES** and follow the backup procedure.



- Select **YES** and follow the backup procedure
- Select the required device (if configured for more than one device)
- Ensure the device is plugged in or the CD is in
- Select **OK** to start the backup

## The need for Backups

Imagine the following Scenario:

Your shop is ram-raided, smashing the front window. Bolt croppers are used to cut all the cables to the equipment so it could be easily removed. You are left with a crime scene and an insurance claim.

The damage and replacement equipment should be covered by insurance.

But what about the **SALONGENIUS** data and even your own data?

The backup function in **SALONGENIUS** only knows about **SALONGENIUS** data and with it your system can be recovered. Without the **SALONGENIUS** data you will have lost the business figures e.g. sales, client records etc.

### BACKUP YOUR SALONGENIUS DATA AND KEEP IT SAFE

So when its closing time on a Saturday night and everyone wants to get down the wine bar and its coat on and off out the door, REMEMBER - It'll take only 2 minutes to do the back-up, just enough time to get your coat and things together, and tonight could just be that night for a ram-raid!

## Other Data Backup Disclaimer



The integral backup facility in SALONGENIUS will **ONLY** copy the SALONGENIUS & Appointment data to an external device for safe-keeping.

**IMPORTANT:** If you have other important data, documents and files on the computer it is **YOUR RESPONSIBILITY** to make appropriate copies for safe keeping

## SALONGENIUS Main Menu

| SALONGENIUS™          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | SALONGENIUS    |               |               |                |          |  |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|---------------|---------------|----------------|----------|--|
| F1 - HELP             | <div style="border: 2px solid blue; width: 100%; height: 100%; position: relative;"> <div style="position: absolute; top: 50%; left: 50%; transform: translate(-50%, -50%); font-size: 2em; font-weight: bold;">6</div> <div style="position: absolute; bottom: 10px; right: 10px; border: 1px solid blue; padding: 2px;"> <div style="border: 1px solid blue; width: 100%; height: 100%; position: relative;"> <div style="position: absolute; top: 50%; left: 50%; transform: translate(-50%, -50%); font-size: 1.2em; font-weight: bold;">7</div> </div> </div> </div> |                |               |               |                |          |  |
| F2 - SYSTEM MANAGER   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F3 - FINANCIAL        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F4 - STOCK & SERVICES |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F5 - REPORTING        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F6 - MARKETING        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F7 - CLIENTS          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |               |                |          |  |
| F8 - STAFF            | Casual Sale                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Staff Purchase | Shop Use      | Damaged Stock | Transfer Stock |          |  |
| F9 - EXIT             | Petty Cash                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Print Docket   | Price Check   | Client F10    | Time Clock     |          |  |
| 10 Jan 2012           | Email                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | SMS            | Backup System | Memo          | Appt System    | 11:06:19 |  |

## Main Menu

The SALONGENIUS Main Menu will now be displayed.

1. **Top Line** – Displays the Salon name
2. **Right panel** – Used for data selection and number pad
3. **Bottom panel** – Sales Control Functions
4. **Bottom line** – Action Control Functions
5. **Left panel** – Dynamic Menu
6. **Middle Panel** – Used to display Data
7. **Data Entry box** – Used to enter data to search for client names, products etc

## Client List

The screenshot shows the SALONGENIUS Main Menu interface. It features a top header with the SALONGENIUS logo and a date/time display. Below the header is a grid of function keys (F1-F7) and a central area with a large blue square (6) and a green rectangle (7). The bottom section contains a grid of transaction keys (F8-F9) and a status bar with a date, time, and system status. Numbered callouts are placed as follows: 1 points to the top header; 2 points to the top right grid; 3 points to the Client F10 key; 4 points to the Backup System key; 5 points to the F4 - STOCK & SERVICES key; 6 points to the large blue square; 7 points to the green rectangle.

| SALONGENIUS™          |             | SALONGENIUS    |               |
|-----------------------|-------------|----------------|---------------|
| F1 - HELP             |             |                |               |
| F2 - SYSTEM MANAGER   |             |                |               |
| F3 - FINANCIAL        |             |                |               |
| F4 - STOCK & SERVICES |             |                |               |
| F5 - REPORTING        |             |                |               |
| F6 - MARKETING        |             |                |               |
| F7 - CLIENTS          |             |                |               |
| F8 - STAFF            | Casual Sale | Staff Purchase | Shop Use      |
| F9 - EXIT             | Petty Cash  | Print Docket   | Price Check   |
| 10 Jan 2012           | Email       | SMS            | Backup System |
|                       |             | Memo           | Appt System   |
|                       |             |                | 11:06:19      |

To select client records from the Main Menu type start typing the client last name e.g. J to see the first client whose last name starts with J

The screenshot shows the Client List screen. It features a list of client names (Isaacs, Jackson, Jagger, James, Jamieson, Jang Bahadur) and a search bar. The list is sorted by Last Name. The search bar contains the letter 'J'. The screen also includes a 'Sort By:-' section with buttons for Last Name, First Name, Phone, Post Code, Email, New Client, Enter, and Cancel ESC. The bottom right corner has a 'Page Dn' button.

| Client Names |           |             |  |
|--------------|-----------|-------------|--|
| Isaacs       | Shanaze   | KW148UU     |  |
| Jackson      | Glenda    |             |  |
| Jackson      | Joanna    |             |  |
| Jackson      | L         | 01888924370 |  |
| Jagger       | Cj        |             |  |
| Jagger       | T         |             |  |
| Jagger       | V         |             |  |
| James        | B         |             |  |
| James        | Dj        |             |  |
| James        | Janice    |             |  |
| James        | M P       | 01065477033 |  |
| James        | Vicky     |             |  |
| Jamieson     | Daisy     |             |  |
| Jamieson     | Lynda     |             |  |
| Jamieson     | S J       |             |  |
| Jamieson     | Shanaze   |             |  |
| Jang Bahadur | Charlotte |             |  |
| Jang Bahadur | Ella      |             |  |
| Jang Bahadur | Maria     |             |  |
| Jang Bahadur | Mollie    |             |  |
| Jang Bahadur | Vincent   |             |  |

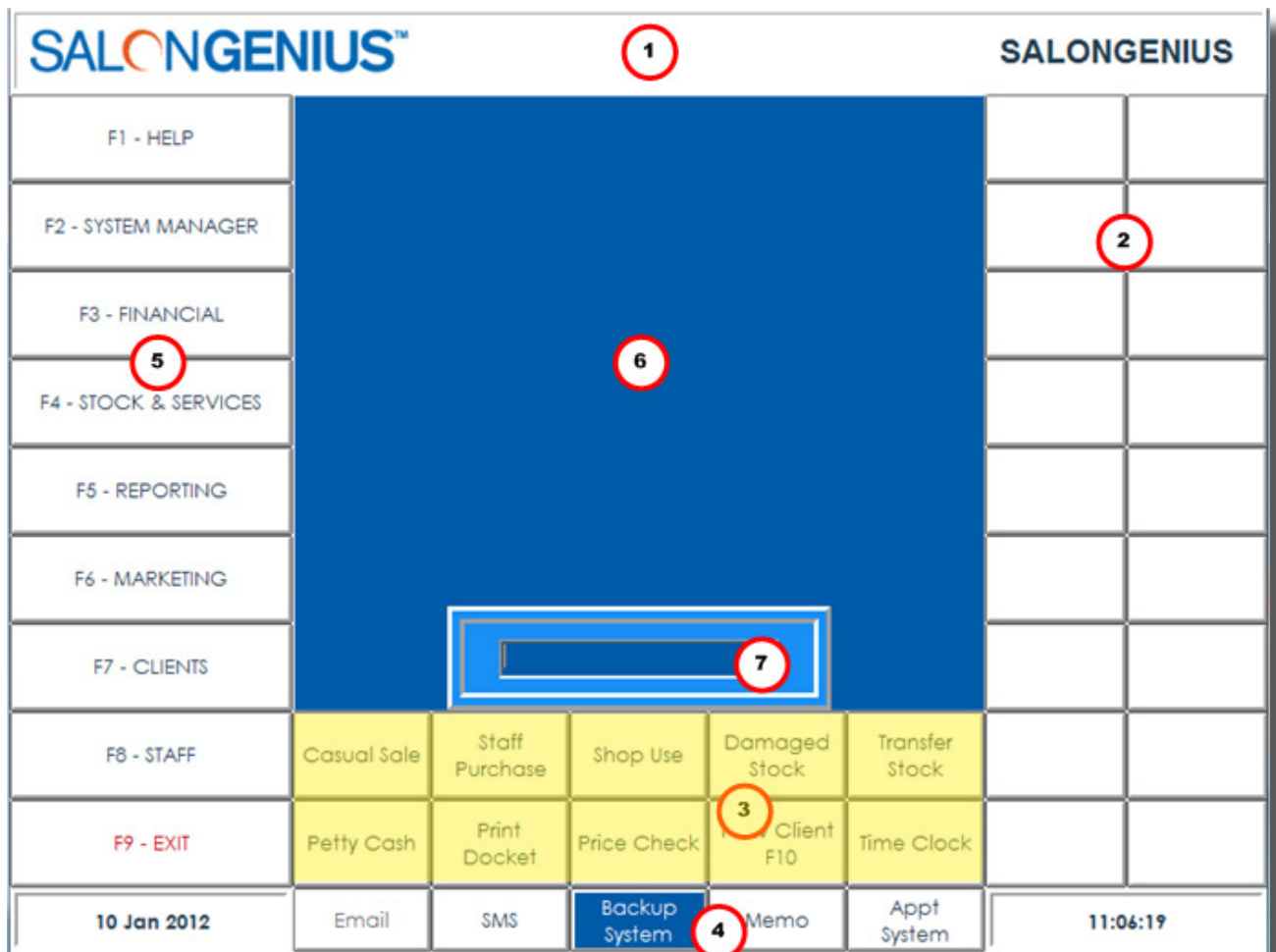
## **Client List**

The Client list, displayed when selecting a Client Record at either the Main Menu or in the Appointment Diary when booking a service, allows ordering of client records by five options:

- Last Name - last name
- First Name - firstname or initial
- Phone - phone or mobile field
- Post Code - postcode
- Email - email address

In all cases, the more that is entered, the better the list is filtered. If no record is found matching the entry, no highlighted record is presented.

## Sales Control Functions



The following are the Sales Control functions in area 3:

- **CASUAL SALE** – Sell with no tracking to client records – uses the system as a till!
- **STAFF PURCHASE** – Sell products to staff members at discount
- **SHOP USE** – Track products out of stock for use in the salon
- **DAMAGED STOCK** – Tracks damaged products out of stock
- **TRANSFER STOCK** – Transfer products out of stock to a destination
- **PETTY CASH** – Track Petty Cash use (See **Quick Guide to...Petty Cash**)
- **PRINT DOCKET** – Only on Till systems to reprint the last receipt
- **PRICE CHECK** – Check the service prices/times or stock prices/levels
- **NEW CLIENT** – Add a new client record
- **TIMECLOCK** – If configured allows staff timekeeping

## Action Control Functions

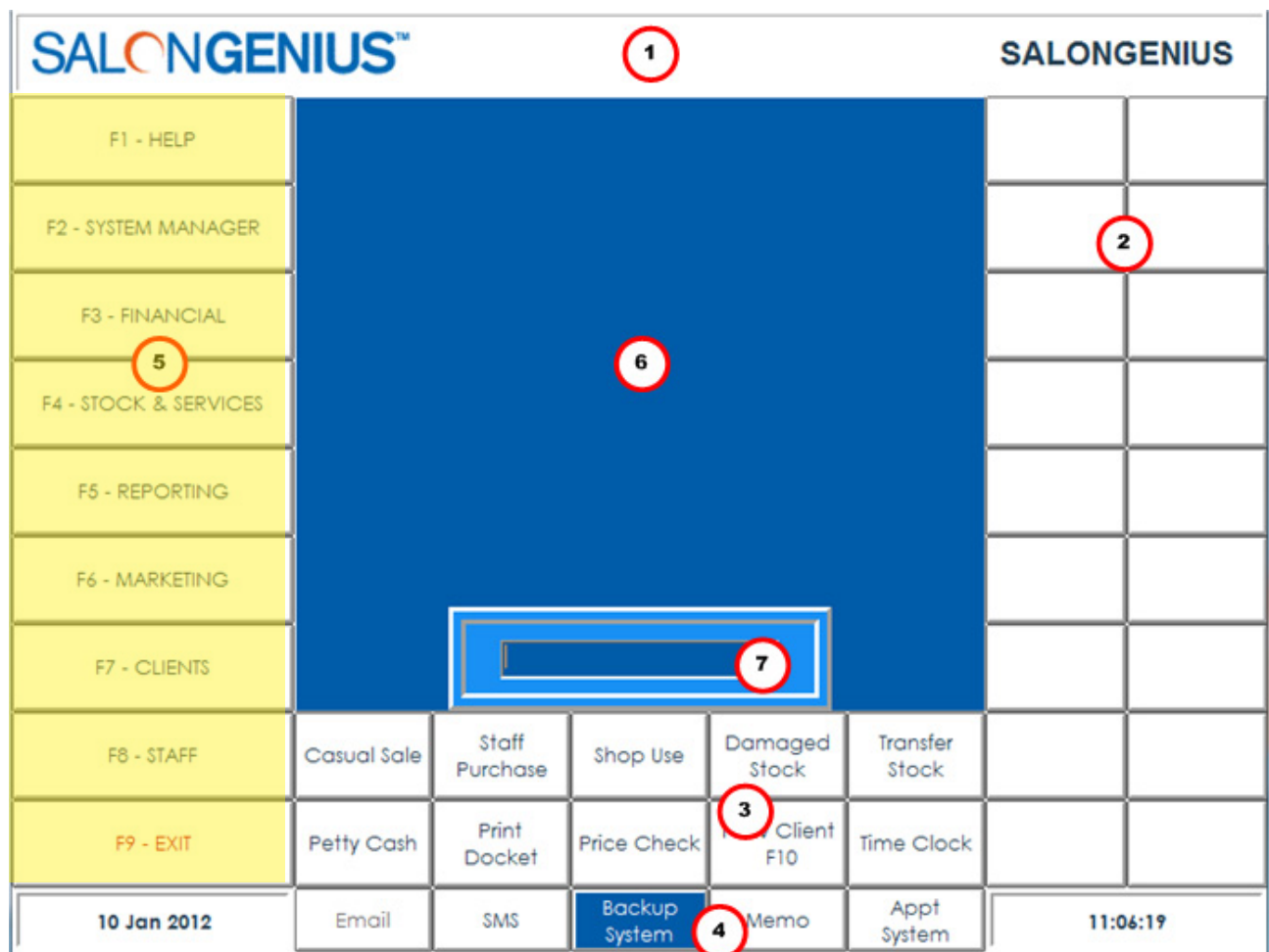
|                         |              |                |               |               |                |          |  |
|-------------------------|--------------|----------------|---------------|---------------|----------------|----------|--|
| SALONGENIUS™            |              | 1              |               | SALONGENIUS   |                |          |  |
| F1 - HELP               | <div>6</div> |                |               |               |                |          |  |
| F2 - SYSTEM MANAGER     |              |                |               |               |                | 2        |  |
| F3 - FINANCIAL          |              |                |               |               |                |          |  |
| 5 F4 - STOCK & SERVICES |              |                |               |               |                |          |  |
| F5 - REPORTING          |              |                |               |               |                |          |  |
| F6 - MARKETING          |              |                |               |               |                |          |  |
| F7 - CLIENTS            |              |                |               |               | <div>7</div>   |          |  |
| F8 - STAFF              | Casual Sale  | Staff Purchase | Shop Use      | Damaged Stock | Transfer Stock |          |  |
| F9 - EXIT               | Petty Cash   | Print Docket   | Price Check   | 3 Client F10  | Time Clock     |          |  |
| 10 Jan 2012             | Email        | SMS            | Backup System | 4 Memo        | Appt System    | 11:06:19 |  |

The following are the Bottom Line functions in area 4:

- **EMAIL** – If configured check for & receive Email messages – highlights in **blue** if messages are waiting to be received
- **SMS** - If configured check for & receive SMS messages – highlights in **blue** if messages are waiting to be received
- **BACKUP SYSTEM** – Start Backup process – highlights in **blue** is system not backed up for 3 days or more
- **MEMO** – Allows system Memo maintenance – highlights in **blue** if Memo for today
- **APPT SYSTEM** – start/change to the Appointment Diary



## Dynamic Menu



The following are the main sections of the Dynamic Menu in area 5:

- **F1 – HELP** – System information and help
- **F2 – SYSTEM MANAGER** – Managerial functions
- **F3 – FINANCIAL** – Performance and Commissions
- **F4 – STOCK AND SERVICES** – Maintain services, stock & stock control etc.
- **F5 – REPORTING** – Reports and Cashing-up
- **F6 – MARKETING** – Select and target clients with letters, text and email
- **F7 – CLIENTS** – Client Pending Histories, CCM and Client Retention
- **F8 – STAFF** – Maintain staff records
- **F9 – EXIT** – Exit SALONGENIUS to Switchboard or jump from any level of the Dynamic Menu to Main Menu (here)



To view the Menu Map click to this icon

## Client Life Cycle

The life cycle of a client follows a typical pattern:

1. The client rings the salon to book an appointment
2. The client arrives in the salon (on the day and in time!) for their appointment and are greeted at Reception and moves through the salon for the services
3. The client returns to Reception to settle the bill and hopefully make another appointment



## Client Books

We will use the Diary to navigate to:

- Correct day...
- Correct column and time...
- Select start time...
- Select Client Name, or
- Add New Client
- Client Names, Address, Telephone(s)
- Select Service(s)
- Select options & Save

The diagram illustrates the workflow for navigating the SALONGENIUS Client Books system. It consists of three main screenshots and a sequence of six steps represented by a large green arrow at the bottom.

**Screenshot 1: SALONGENIUS Diary (Tue 10 Jan 2012)**  
This screenshot shows a calendar view with columns for different staff members: LIZZIE OXENHAM, VIKKI POW, NICKI BATSTONE, JESSICA GAMMELL, and JESSICA GAMMELL. The time slots range from 10:45 to 13:00. A red arrow points from the 'Navigate to correct day/date' step to the date 'Tue 10 Jan 2012'.

**Screenshot 2: Client Details Form**  
This screenshot shows a form for entering client details. It includes fields for Phone Number, Mobile Number, Receive Phone, Receive SMS, Email Address, and Book Online. A red arrow points from the 'Navigate to correct Column & Time' step to the 'Phone Number' field.

**Screenshot 3: Service Selection Screen (Wed 11 Jan 2012)**  
This screenshot shows a service selection screen for 'Mens Cut & Blow Dry'. It includes a table for selecting services, a 'Notes' section, and a 'Save' button. A red arrow points from the 'Select the Intersection of the start time in the correct Column' step to the '10:00' time slot.

**Sequence of Steps:**

- Navigate to correct day/date
- Navigate to correct Column & Time
- Select the Intersection of the start time in the correct Column
- Select Client or add New Client
- Set required Switches
- SAVE

## Client Arrives

Use the Diary screen to to:

- Select the clients' Appointment
- Set IN SALON to YES & SAVE
- Client Bill is created in the OPEN BILL list

| SALONGENIUS Tue 10 Jan 2012                                                  |                                         |                                             |                                    |                     |          |                    |         |           |                     |  |             |
|------------------------------------------------------------------------------|-----------------------------------------|---------------------------------------------|------------------------------------|---------------------|----------|--------------------|---------|-----------|---------------------|--|-------------|
| Styling                                                                      |                                         |                                             | Technical                          |                     |          | Juniors            |         |           | Management          |  |             |
| LIZZIE OXENHAM (1)                                                           |                                         |                                             | VIKki POW (4)                      |                     |          | NICKI BATSTONE (4) |         |           | JESSICA GAMMELL (3) |  |             |
| <                                                                            | LIZZIE OXENHAM (1)                      | VIKki POW (4)                               | NICKI BATSTONE (4)                 | JESSICA GAMMELL (3) |          |                    |         |           |                     |  | >           |
| 10:45                                                                        | * C GABLE Mens Cut & Blow Dry           | Marina Raines Cut & Blow Dry Ladies         | Brenda Heals Cut & Blow Dry Ladies |                     |          |                    |         |           |                     |  | Page Up     |
| 11:00                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  | ↑           |
| 11:15                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  |             |
| 11:30                                                                        |                                         | * HEATHER CACKETT (1) Cut & Blow Dry Ladies | Meeting                            |                     |          |                    |         |           |                     |  | NOW         |
| 11:45                                                                        | Geraldine Addcott Cut & Blow Dry Ladies |                                             |                                    |                     |          |                    |         |           |                     |  | Next 7 Days |
| 12:00                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  |             |
| 12:15                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  | ↓           |
| 12:30                                                                        | Y Venn Cut & Blow Dry Ladies            | Lunch                                       |                                    |                     |          |                    |         |           |                     |  |             |
| 12:45                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  | Page Dn     |
| 13:00                                                                        |                                         |                                             |                                    |                     |          |                    |         |           |                     |  |             |
|                                                                              | Rooms / Equipment                       | Day Sheet                                   | Previous Week                      | Previous Day        | Next Day | Next Week          | 6 Weeks | Year View | Options             |  |             |
| Waiting List 10 Jan 2012 13:28 In Salon Du... Late ... Email SMS SALONGENIUS |                                         |                                             |                                    |                     |          |                    |         |           |                     |  |             |

|                                                               |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
|---------------------------------------------------------------|-------------|----------------------------------------------------------|----------|----------------------------------------------------------|-------------|----------------------------------------------------------|--|----------------------------------------------------------|--|----------------------------------------------------------|--|
| Mens Cut & Blow Dry                                           |             |                                                          |          |                                                          |             | Wed 11 Jan 2012                                          |  |                                                          |  |                                                          |  |
| Mr C Gable                                                    |             |                                                          |          |                                                          |             | 07886544331 Checked: 10/01/12                            |  |                                                          |  |                                                          |  |
| Last 7 Visits: YYYYYYY                                        |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Start Time                                                    | Finish Time | Operator                                                 | Discount | Service Total                                            | Visit Total |                                                          |  |                                                          |  |                                                          |  |
| 10:00                                                         | 10:45       | LIZZIE OXENHAM                                           | 0.00     | 32.00                                                    | 32.00       |                                                          |  |                                                          |  |                                                          |  |
| Special Service Account: 60.00 Last Skin/Elasticity Test: / / |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| <input type="checkbox"/> Yes <input type="checkbox"/> No      |             | <input type="checkbox"/> Yes <input type="checkbox"/> No |          | <input type="checkbox"/> Yes <input type="checkbox"/> No |             | <input type="checkbox"/> Yes <input type="checkbox"/> No |  | <input type="checkbox"/> Yes <input type="checkbox"/> No |  | <input type="checkbox"/> Yes <input type="checkbox"/> No |  |
| In Salon                                                      |             | Requested Operator                                       |          | Remind Client                                            |             | Remind Client                                            |  | Salon Freq: 15.5                                         |  |                                                          |  |
| Notes Associated Appts Repeat Relationships                   |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Client Notes                                                  |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Don't talk about the divorce                                  |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Appointment Notes Edit                                        |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Save Another Service Move Repeat Return to Diary              |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |
| Save and Remind New Appointment Cancel                        |             |                                                          |          |                                                          |             |                                                          |  |                                                          |  |                                                          |  |

Navigate to correct day/date

Select the correct booking

Set IN SALON

SAVE

## Client Pays

Using SALONGENIUS screen to:

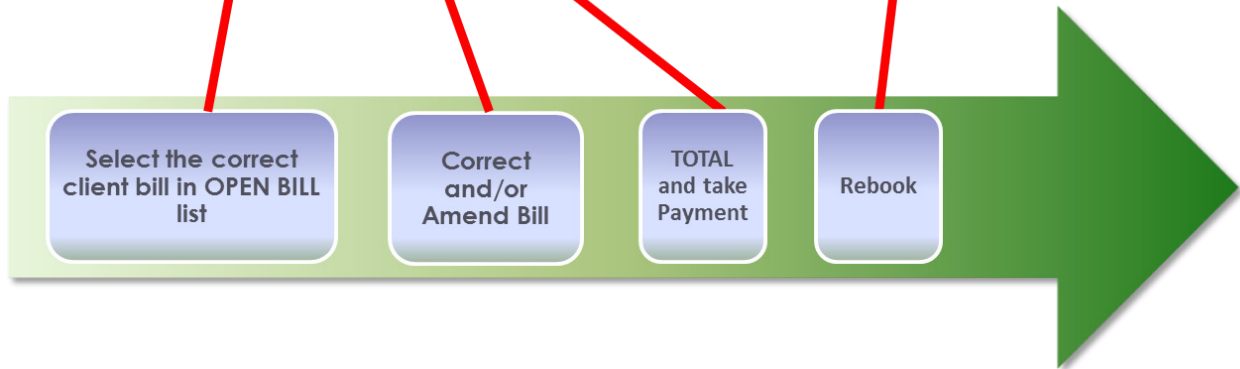
- Select the clients' bill from the OPEN BILL list
- Complete the bill
- Select TOTAL and payment method
- Rebook the client

|                   |           |                   |        |                 |                   |               |           |                       |                                     |                |           |
|-------------------|-----------|-------------------|--------|-----------------|-------------------|---------------|-----------|-----------------------|-------------------------------------|----------------|-----------|
| Beauty            | Juniors   | <b>Mr C Gable</b> |        |                 |                   |               |           | E39.64<br>31/12/2012  | <input checked="" type="checkbox"/> | Artec Range    | GHD Irons |
| Management        | Reception | No                | Op     | Qty             | Items             | 121.00        | Amount    |                       |                                     | Hi             | Kerastase |
|                   |           | 1                 | LIZOKE | 1               | Moment & Blow Dry | 18%           | 27.20     |                       |                                     |                |           |
| Styling           | Technical | 2                 | MAMMA  | 1               | Mel 2             | 18%           | 7.22      |                       |                                     | Label-M        | Model Me  |
|                   |           |                   |        |                 |                   |               |           |                       |                                     | TG Accessories | Test      |
|                   |           |                   |        |                 |                   |               |           |                       |                                     | TIGI           | TON&OUT   |
|                   |           |                   |        |                 |                   |               |           |                       |                                     | Wella          | Packages  |
|                   |           | Service           | 27.20  | Sun charges     | 6.00              | 20% 5.76      | Total     | 34.42                 |                                     |                |           |
|                   |           | Retail            | 7.22   |                 |                   |               | Tendering | 0.00                  |                                     |                |           |
|                   |           |                   |        |                 |                   |               | Change    | 0.00                  |                                     |                |           |
|                   |           | 2 Of 2 Items      |        | Enter           |                   |               |           |                       |                                     |                |           |
|                   |           | Gift              |        | Revise / Redo   |                   | Cancel        |           | Cancel EIC            |                                     |                |           |
|                   |           | Discount          |        | Retail Products |                   | Sale Products |           | Refund                |                                     |                |           |
| Previous Products |           |                   |        |                 |                   |               |           | 16 January 2013 14:30 |                                     |                |           |

The screenshot shows a web interface for scheduling appointments. At the top, a green banner reads "Select Next Appointment Date". Below this, a green box indicates the "Last Visit: 14/01/2012 (8 Weeks)". There are two main sections for selecting appointment frequency: "Client Frequency (4 Weeks)" and "Salon Frequency (15 Weeks)". Each section contains a grid of buttons for different time intervals (1, 2, 3, 4, 5, 6, 7, 8, 9, 10 weeks) with corresponding dates. The "8 Weeks" button in the Client Frequency section is highlighted in green. Below the grids are two large buttons: "No Thanks" (red) and "Already Rebooked" (green). A red arrow points to the "No Thanks" button. At the bottom, a blue bar contains the text "Next 1 Appointments Fri 20/01/2012 @ 10:00 - Mens Cut & Blow Dry LUZZIE OXENHAM".

| Select Next Appointment Date             |                         |                         |                                          |                          |
|------------------------------------------|-------------------------|-------------------------|------------------------------------------|--------------------------|
| Last Visit: 14/01/2012 (8 Weeks)         |                         |                         |                                          |                          |
| 1 Week<br>(23/01/2012)                   | 2 Weeks<br>(30/01/2012) | 3 Weeks<br>(06/02/2012) | 4 Weeks<br>(13/02/2012)                  | 5 Weeks<br>(20/02/2012)  |
| 6 Weeks<br>(27/02/2012)                  | 7 Weeks<br>(05/03/2012) | 8 Weeks<br>(12/05/2012) | 9 Weeks<br>(19/03/2012)                  | 10 Weeks<br>(26/03/2012) |
| Client Frequency (4 Weeks)<br>13/02/2012 |                         |                         | Salon Frequency (15 Weeks)<br>30/04/2012 |                          |
| No Thanks                                |                         |                         | Already Rebooked                         |                          |

Next 1 Appointments  
Fri 20/01/2012 @ 10:00 - Mens Cut & Blow Dry LUZZIE OXENHAM



## Equipment & Startup

### Turning on the equipment

Please ensure that the printers and screen are turned on before starting the computer.

#### Computers

##### Leaving Computers on out of hours

Computers may be left turned on (although exited to Switchboard or the desktop) to allow scheduled scans and backups to continue to run.

If you use Online Bookings or 24/7 then your Data Server computer **MUST** be left running (although exited to Switchboard or Desktop) to allow the webservice to reference your data.

**RECOMMENDATION:** Computers should be restarted every 2-3 days. Restart your computers following the same principles listed below.

##### Data Server

If you have only one computer then this will be your data server computer.

If you have more than one computer using SALONGENIUS then one of your computers will be setup as your data server computer. This means the SALONGENIUS data is stored on this computer and all the other computers will communicate via your network with this computer to access the same data.

That is why this computer must be the one that is started/restarted before the others.

##### Turning On

Most computers will have a power button (indicated by ①) and there will usually be a green light to show power on.

Pressing this button when no green light is showing will turn the computer on.

##### Turning Off

Computers should be shutdown correctly using the operating system shutdown option: START - SHUTDOWN

**WARNING:** Pressing and Holding this button when the green light is on should only be used when a computer is completely frozen and unresponsive so causing the computer to power off.

#### Mice and Keyboards

Both mice and keyboards usually plug in to the computer and get their power from the computer.

#### Dongle

The SALONGENIUS supplied Dongle is registered for your use only and plugs in to the computer and gets its power from the computer.

If your Dongle is not plugged in, or faulty, your SALONGENIUS system will not start.

#### Screens

Most screen will have a power button (indicated by ①) and there will usually be a green light to show power on.

Pressing this button when no green light is showing will turn the screen on.

Turning the screen off will cease display of computer information even though the computer is still running.

#### Printers

Most printer will have a power button (indicated by ①) and there will usually be a green light to show power on.

Pressing this button when no green light is showing will turn the printer on.

Turning the printer off will cease printing functionality even though the computer is still running.

Most systems will have a Report printer and one or more Receipt printers

Report printers usually use normal A4 copier paper and will require periodic replacement of toner cartridges as they are depleted. Be sure to follow the manufacturers instructions for loading paper, toner cartridges and for operation.

Receipt printers usually use thermal paper till rolls. There is no ink/toner that requires replacement. Be sure to follow the manufacturers instructions for loading till rolls and for operation.

## Till

The cash drawer connects to the Receipt printer and gets what little power it uses from the Receipt printer. Therefore if the Receipt printer is turned off then the Till drawer will not open.

## Scanners

Barcode scanners plug in to the computer and usually get their power from the computer.

## Memory Stick / Pendrive

The Pendrive usually plugs in to the computer and get its power from the computer.  
The Pendrive is used to backup your SALONGENIUS data

## Biometric Fingerprint Readers

Fingerprint Readers plug in to the computer and usually get their power from the computer.

## OCIUS Chip & Pin devices

SALONGENIUS supplied Chip & Pin devices plug in to the computer but usually get their power from their own power connection.

## Backing-up data

IMPORTANT: Please read and understand the difference between SALONGENIUS data and other data you might have stored on the computer e.g. documents, forms, accounts, music etc.

### Manual SALONGENIUS Backup

SALONGENIUS provides a backup function that creates a compressed copy of the SALONGENIUS data on the Data Server and copies it to the configured backup device (usually a pendrive).

### Automatic Backup

A additional cost option (called 24/7) can be installed on your Data Server to allow automatic backup, via the internet, to a remote server computer.

The service is scheduled to operate at least once every 24 hours, usually overnight, to automatically create a backup of the SALONGENIUS data and also any other critical/important data on the computer.

Thus, the Data server computer would need to be left running (although exited to Switchboard or desktop).

**WARNING:** Failure to leave the computer running or failure of internet connectivity when the backup is scheduled remains the responsibility of the user and not of SALONGENIUS.

## Other Data

If you have other data on your computer that you feel should be backed-up for security purposes, the manual SALONGENIUS backup function **DOES NOT** create a compressed copy of it.

If you require this data to be backed-up you should copy the data yourself, using your Operating System facilities, or consider the *Automatic Backup* option described above.

**WARNING:** SALONGENIUS cannot be held responsible for the loss or corruption of any software,

information and/or data installed on computers using the SALONGENIUS system, that is not part of the SALONGENIUS system.



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