Touch Suite SALON TS®

User Manual

Important Numbers

Serial Number	
Merchant Number	
User ID	
Password	
Bank Number	
Voice Authorization Number	
Agent	
Agent Phone Number	

Contents

1 Getting Started

Package Contents

Your TouchSuite Salon package includes the following components:

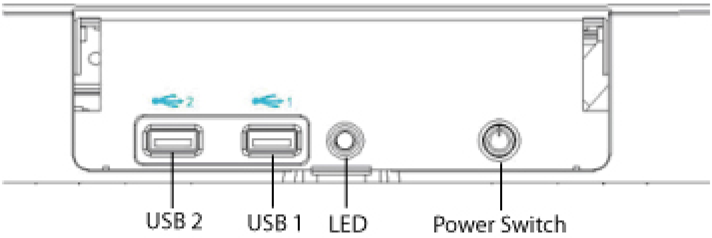
- Main Terminal
- Cash Drawer
- Barcode Scanner*
- Receipt Printer
- Keyboard
- USB Headset*
- Battery Backup*
- Report Printer*
- Pin Pad*
- Pole Display*
- USB Cable
- LAN / Ethernet Cable
- Screen Cleaner Kit
- Sample Gift Card

**Optional Items*

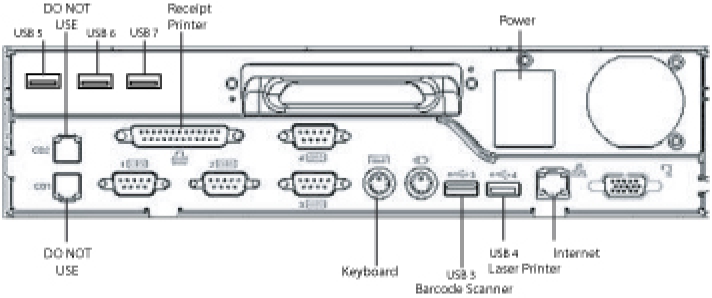
The TouchSuite main terminal is a durable, smart and compact unit specifically designed for retail/POS applications.


Touch Suite

Front View



Rear View



IMPORTANT: Some hardware differences should be noted. You may have a terminal that looks like the above. If not, don't panic. We have released other versions of our terminal. Most notably, the USB ports may be different. On some versions you have 2 USB ports in front, others have 1. The USB3, USB4 ports on the back may instead be USB ports 2-5 (4 on the back instead of 2).

You can use any of the ports in these same areas when referenced below. If you have any questions you can call technical support.

Hardware Setup

IMPORTANT: You must complete all steps before powering on the components. Some steps may be optional if that component did not come with your system (denoted by an *).

TouchSuite installation is very basic and can be completed by the average user in under 20 minutes by following the instructions in numeric order. A step-by-step QuickSetup Guide with helpful pictures is included in your shipment. A QuickSetup Video is also available within our website knowledgebase. General support is available at http://support.touchsuite.com.

STEP 1 – Battery Backup*

a) Placement: Set the Battery Backup behind the area where you plan to set up your TouchSuite system or underneath the desk you will be using (provided that all cables can reach it).

b) Power: Plug the Battery Backup power cable into the nearest power outlet. (You may use an additional power strip or extension cord if the battery backup does not reach the nearest power outlet).

NOTE: This unit allows your system to run on battery power for several minutes in the event of a power outage and also protects the operating system from power surges.

STEP 2 – Cash Drawer

a) Placement: Set the cash drawer on the desk where you plan to use it. Since the cash drawer will pop open after each transaction, you should not place anything in front of it.

b) Power: No power cord required.

c) Connections: Plug the Cash Drawer cable (looks like a telephone cord) into the port underneath the cash drawer unit. (It will eventually be connected to the receipt printer).

The Cash Drawer/Receipt cable is the 6 wire (conductor) flat cable that comes with your TouchSuite System. Not the 2 wire (conductor) flat cable the may be included with your Battery Backup.

d) Other: A cash drawer key and duplicate key are provided to lock and unlock the cash drawer as needed. Straight up and down is ‘unlocked’. Turn right to ‘lock’. Turn left to manually ‘pop open’. (Once your system is up and running, you will be able to open the drawer without using the key by pressing the ‘Open Drawer’ button in the ‘Back Office’ section of the program).

STEP 3 – Main Terminal

a) Placement: Set the main terminal display on top of the cash drawer. Turn the terminal around so that the back is facing you, as you will need to attach various cords in steps 4 thru 8. Unscrew/remove the back housing for access to all ports: To do this, press gently on top of the housing and loosen the two thumb screws (one on each side). Locate the finger-sized buttons (one on each side). Press the buttons together and lift the housing up and toward you.

b) Power: Attach the Main Terminal power cable to the terminal and insert the other end into the Battery Backup in the area marked Battery + Surge.

NOTE: In the event of a power outage, the battery backup will beep loudly. You should immediately back up your data and shut down the system. Battery power acts as a safety net. It is not for extended use.

c) Connections: In the next steps, you will connect the Receipt Printer, Barcode Scanner, Laser Printer, Pin Pad, Pole Display, Broadband and Keyboard in various ports of the main terminal (Steps 4 thru 10).

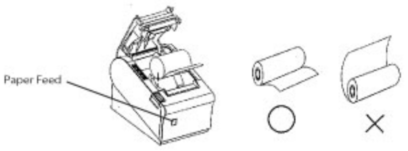
STEP 4 – Receipt Printer

a) Placement: Set the Receipt Printer adjacent to the Main Terminal.

b) Power: Attach the Receipt Printer power cable to the back of the Receipt Printer. The opposite end is the A/C adapter. Plug the provided A/C adapter cord into the A/C adapter and attach the opposite end into the Battery Backup in the area marked Battery + Surge.

c) Connections:
   i. Plug the Printer cable (numerous grooves) into the back of the Receipt Printer and close the metal clasps.
   ii. Connect the other end into the Main Terminal long pink port (25 pinholes).
   iii. Plug the Cash Drawer cable (the one left disconnected in Step 2) into the back of the Receipt Printer.

d) Other: Remove tape from the printer housing. Press the black button at top right of the unit to lift the paper cover. Remove the test printout and tape strip from inside the unit. Unwrap the receipt paper from its gold foil package. Insert receipt paper (as pictured below). Unroll some paper past the opening and close cover.



NOTE: Thermal receipt paper is standard 3⅛” single-ply. (3” paper is also acceptable). Refill rolls and economy packs are available at your local office supply store. Thermal paper is heat activated (i.e., it does not use ink) so it is important to buy the correct ‘thermal’ paper for use with TouchSuite.

STEP 5 – Barcode Scanner*

a) Placement: Set the Barcode Scanner adjacent to the main terminal.

b) Power: No power cord required.

c) Connections: Plug the Scanner cable (USB) into the Main Terminal in the port marked USB3.

STEP 6 – Laser Printer*

a) Placement: Set the Laser Printer on the desk or a nearby table where you plan to use it.

b) Power: Attach the power supply cord at the back right of the laser printer and insert the opposite end into the Battery Backup in the area marked only Surge (note that the battery has two sides – one marked *Surge* and one marked *Battery & Surge.* It is important to plug this power cord on the correct side marked only *Surge*).

c) Connections: Attach the USB cord to the back left of the laser printer at the area marked USB and connect the opposite flat end into the back of the main terminal in the port called USB4.

d) Other: Insert toner cartridge and paper. (Open the front panel of the Laser Printer by pulling it toward you, unwrap and shake the toner cartridge and insert. Close front cover. Pull out paper tray and add paper. Close tray.)

NOTE: An indicator light lets you know when the ink *toner cartridge* should be replaced. You can purchase additional toner at your local office supply store. The toner part # is printed on a sticker inside the toner compartment. Or simply write down your printer brand/model (e.g., Brother HL-2140) so you can choose the appropriate toner at the store.

STEP 7 – Pin Pad*

a) Placement: Set the Pin Pad near the main terminal. Make sure clients have easy access to enter their pin codes.
b) Power: No power cord required.
c) Connections: Plug the cable (USB) into the Main Terminal in one of the back USB ports if available or in the front USB port next to the power button.
d) Other: Make sure your merchant account is setup to handle debit transactions.

STEP 8 – Pole Display*

a) Placement: Set the Pole Display near the main terminal. Make sure clients can view the display.
b) Power: No power cord required.
c) Connections: Plug the cable (USB) into the Main Terminal in one of the back USB ports if available or in the front USB port next to the power button.
d) Other: Refer to the Backoffice portion of the manual in order to set up the pole display message.

STEP 9 – Broadband

a) Connections: Attach your broadband LAN/Ethernet (router) cable (looks like a large telephone cord) into the Main Terminal Ethernet port. If your Broadband is not yet installed, you should still attach the provided cable into the Main Terminal, leaving the other end disconnected, and proceed to the next step.

NOTE: TouchSuite requires a high-speed internet connection such as DSL or cable Internet. If you do not currently have high-speed, you must contact an Internet service provider (e.g. your local phone or cable company) and have it installed.

STEP 10 – Keyboard

a) Placement: Set the Keyboard where you plan to use it (not in front of the cash drawer, as the drawer needs to pop open).

b) Power: No power cord required.

c) Connections: Plug the Keyboard cable (purple connector) into the Main Terminal round purple port.

STEP 11 – Replace Housing

a) Placement: Replace the back housing of the Main Terminal.
   i. To do this, simply place the housing back on top of the system.
   ii. Push the housing forward and down until it clicks in place.
   iii. Press gently on top of the housing and tighten the thumb screws on each side.

b) Turn the Main Terminal around so that the front is now facing you.

STEP 12 – Power On

Power on your devices in the following order:

a) Battery Backup *(on/off button at top left of unit)*.

b) Laser Printer *(on/off button at right-hand side of unit)*.

c) Receipt Printer *(on/off button at back left of unit).*

d) Main Terminal *(on/off button at front below logo, under plastic cover)*. *You can tilt the monitor back for easier access to this button.*

NOTE: TouchSuite processes credit cards using American Bancard merchant services. Please have your merchant account info available when powering on TouchSuite for the first time, as you will be prompted to enter it into the program. Call your TouchSuite representative for further assistance. You may also skip sections as necessary and add the information later with the help of TouchSuite customer support.

Software Startup Wizard

When you power on the main terminal, the TouchSuite Salon software will load automatically. This may take a few minutes. You will be guided by the Startup Wizard to enter important information that will enable proper setup. You may skip sections as necessary and add the information later with the help of TouchSuite customer support.

NOTE: Do not skip 'SuperUser Setup'. This setting gives you access to all section of the program.

License Agreement

Read and accept the End User License Agreement.

Welcome Screen

Read the welcome message and press 'Next' to continue.

TouchSuite System

Select your TouchSuite product from the drop-down list. Press 'Next' to continue.

a) 'Salon' for Hair Salons and Spas
b) 'Pro' for General Retail
c) 'Pets' for Groomers, Pet retail and Pet Boarding Industries
d) 'Café' for Quick Service Food Establishments

Company Information

Enter your business contact information, including name, address and phone numbers. Press 'Next' to continue.

Business Hours

Enter your business hours using the drop-down lists. Press ‘Next’ to continue.

Tax Information

Enter your local sales tax rate information. Press ‘Next’ to continue.

System Date/Time

Set your local time and date by pressing the ‘Set Date/Time’ button at the center of the screen and adjusting the settings on the pop-up. Press ‘Next’ to continue.

Merchant Account

Check [√] the box next to your Processing Platform and enter your Merchant ID number(s) as directed by TouchSuite Customer Service. **If this information is not yet available, you may continue the setup process.** Importantly, you will not be able to process payments until this information is entered. Press ‘Next’ to continue.

> NOTE: Your merchant account settings are provided by TouchSuite Customer Service at 561-948-7288. You will not be able to complete this section until you call this number for assistance.

SuperUser Setup

Enter the name of an owner or manager who will have access to all sections of the program. (Enter first name, last name, staff type, and unique 4-digit passcode). Press ‘Next’ to continue.

Staff Members

Enter each staff member one at a time (first name, last name, staff type and unique 4-digit passcode). Press ‘Save’ after each entry. You will notice that each entered staff member appears in a window below. (To delete a staff member from the list, touch the name on the list and press ‘Delete’). You can always modify this list later.

However, the more thorough you are at this stage, the easier it will be for you to start using the system right away. Press ‘Next’ when finished.

Verify Internet

Press the ‘Test Internet’ button to verify your Internet is working properly. Press ‘Next’ to continue.

Email Setup

Enter the POP information for the email you will be using with TouchSuite. If you do not have this information available, it can be added later in the Back Office section. Call your Email provider for proper settings. Press ‘Next’ to continue.

Verify Email

Press the ‘Test Email’ button to verify your email is working properly. If your Internet is not installed or you did not enter your email settings on the previous page, you may bypass this section and proceed to the next step. Press ‘Next’ to continue.

Print for Your Records

Review the customer support information on your screen and print for your records. Press ‘Next’ to continue.

Start TouchSuite

Read the final message and press ‘Start TouchSuite Salon’.
You will be taken to the Home Screen.

NOTE: For instructions on building your database, please review Chapter 2 ‘Basics’.

2 Basics

TouchSuite Salon at a Glance

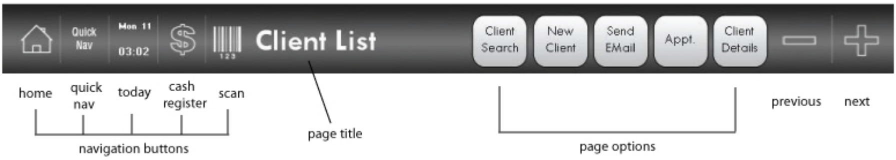
Simple design and a high-resolution touch screen make it easy to learn and use TouchSuite Salon. Simply tap a section and type your information.

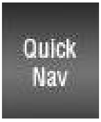
Home Screen

Main menu choices are displayed in large boxes. At the bottom of the screen is the *navigation bar* (NavBar), which provides you with options and tools you need, based on the section you are viewing.

Navigation Bar

The NavBar is always present on your screen. It tells you the title of the page you are on. It also provides you with options and tools. The buttons on the left are the ones you always need access to (Home, QuickNav, Today's Book, Register, Scan). The buttons on the right vary for each page, based on the needs of that page (New Client, Send EMail, etc).



Button:	Use For:
Home 	This button will take you back to the home screen.
QuickNav 	This button opens up an additional navigation bar to access other commonly used sections.
Today 	This button tells you the current time and date. **If you touch it, you'll go directly to today's appointment schedule.** So, it's super easy to get to the most important page in the program – today's schedule.
Register 	This button takes you to the cash register. You can check-out customers, take payments and gift cards, apply discounts, scan products for purchase, view open tickets,

	edit tickets, open the cash drawer, print receipts and more.
Scan 123	This button quickly takes you to the cash register and opens the scan pop-up.
Minus/Plus − +	These buttons are for Previous and Next. In the Book day view, for example, 'Plus' will take you to the next day and 'Minus' will take you to the previous day.

Page Options

GENERAL

Button:	*Use For:*
Save	Use this button to save changes to your database.
Delete	Use this button to delete selected info from the database.
Print	Use this button to print the entire list or report you are viewing.
Print Page	Use this button to print only the current page of a report.

CLIENTS

Button:	*Use For:*
Search	Use this button to search for clients who fit specified criteria.
Clear Search	Use this button clear the search results and go back to the full client list.

New Client	Use this button to add a new client to the database.
Send EMail	Use this button to send an Email to a selected Client.
Appt.	This button takes you to the Book to make an appointment for the selected client from the Client List. (If there are any existing appointments for this client, they will be displayed on an alert pop-up).
Save New	Use this button to save a new client, and immediately clear the screen to enter the next new client.

STAFF

Button:	*Use For:*
New Staff	Use this button to add a new staff member to the database.
Week	Use this button to view the current week schedule for a selected stylist.
Print Dailys	Use this button to print daily sheets for your staff members.
Appt.	Use this button to go to the book month view directly from the staff section.
Staff Reports	Use this button to access staff-specific reports (appropriate access level required).

SERVICES

Button:	*Use For:*
New Service	Use this button to add a new service to the database.
Package Bundles	Use this button to access the Packages & Bundles feature.

PRODUCTS

Button:	*Use For:*
Search	Use this button to do an advanced search for products (by size, type, color, etc).
Clear Search	Use this button to clear the search results and go back to the full product list.
Company Use	Use this button to remove shop-use products from your inventory.
Package Bundles	Use this button to access the Packages & Bundles feature.
Clone	Use this button to make a copy (i.e., reuse) information from an existing product or product order to create a similar product or product order.
New Product	Use this button to add a new product to the database.

BOOK

Button:	*Use For:*
Find Openings Mode	Use this button to select an *openings chart* of appointments for all staff/technicians for a future week.

Flexpedia	Use this button to search for the perfect itinerary for a client who wants multiple services on the same business day.
Week	Use this button to view the *openings chart* of appointments for all staff/technicians for the current week.
Month	Use this button to go back to the month view for selecting a date to view in the book.
Visual Flexpedia	Use this button to filter the book day view – to view selected staff members only.
Text Dailys	Use this button to text daily appointments to your staff/technician's mobile phone. (TouchSuite SMS account required).
Print Dailys	Use this button to print daily sheets for all staff/technicians.
Split/Full Screen Toggle	Use this button to Close or Open the Wait List window. ** Future version.

CASH REGISTER

Button:	*Use For:*
Find Open Ticket	Use this button to find saved tickets that have not yet been checked out.
Save Ticket	Use this button to save a client ticket and check out later.
Search	Use this button to search for products, packages, and bundles to add to a client ticket.
Quick Client	Use this button to quickly add a new client to the database while

	still in the checkout screen.
Clear All	Use this button to clear the current ticket info from the Ticket Manager.
Reprint	Use this button to access a receipt list and gift certificate list, and reprint a client receipt or gift certificate.

VENDORS

Button:	*Use For:*
Receiving Manager	Use this button to access the Receiving Manager feature.
New PO	Use this button to begin a new purchase order.
New Vendor	Use this button to add a new vendor to the database.

TIMECLOCK

Button:	*Use For:*
Modify	This is for manager use only – to view and edit staff timeclock data.
Insert	Use this button to add new timeclock data for a staff member who did not clock-in on a particular day.
Update	Use this button to update an existing clock-in that needs correction.

Page Tabs

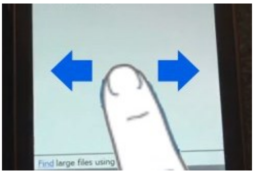
Page tabs and sub-tabs at the bottom of screen help you navigate various sections

Dynamic Drop-Down Lists

Once inside a program section (ie, clients, staff, etc), you'll notice that many data entry fields use dynamic drop-down lists (eg, area code, staff type, product category, etc) that recall frequently used entries so you don't have to retype common information. You may select an item from these drop-downs or add a new entry by typing into the same text box. The system will remember your new entry and add it to the drop-down for future use.

Finger Swipe

Navigate appointments and menu items on select screens … with a simple finger-swipe gesture. You may also use the scroll bar in these areas if you prefer.



Help Screens

For help on any page, simply touch the NavBar. A help screen pop-up will appear. Tabs at the top of the screen help you navigate the various help modules: *Help Manual, Snippets* and *Support*.

Help Manual

The *Help Manual* gives you step-by-step instructions for tasks related to the section of the program you are currently viewing. Simply use the scroll bar on the right-hand side to move the page down as you read this helpful information.

To view the Help Manual:

1. Touch any blank area on the NavBar.
2. The ‘Help Manual’ tab should already be selected.
3. Simply read the manual on screen (use the scroll bar to move the page down).
4. Touch ‘Close’ at the bottom of the page when finished.

> NOTE: To view the entire Help Manual, tap any blank area on the NavBar while on the *Home* screen.

Snippets

Snippets are short video tutorials to help you quickly learn how to use specific TouchSuite features. (e.g., double book, apply discount, etc.). They are generally 1 to 2 minutes long.

To view a Snippet:

1. Touch any blank area on the NavBar.
2. Select the ‘Snippets’ tab.

3. Make sure your USB headset is connected to one of the USB ports at the front of the terminal. (To access a USB port, simply tilt the touchscreen back and lift up the plastic cover).
4. Select a video ‘Snippet’ from the drop-down list.
5. Touch ‘Play’.
6. Touch the ‘Stop’ [■] button to stop this video at any time, if desired. (If the playback controls [stop, play, pause, etc.] are not visible, simply tap the screen and they will reappear).
7. Touch ‘Close’ at the bottom of the page when finished.

NOTE: To download additional Snippets, simply touch ‘Download More’ and the most recent videos will be delivered to you in a few moments.

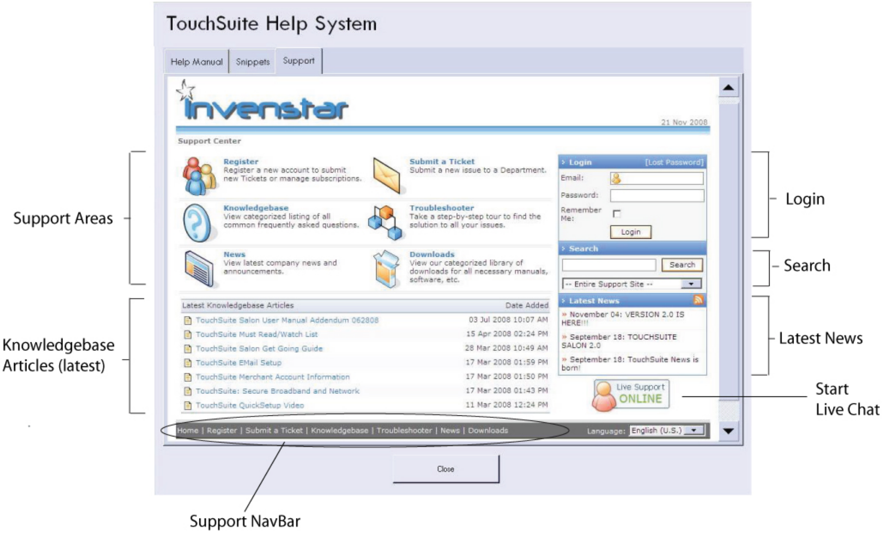
Support (Online)

Support is where you can find answers to most of your questions, start an online chat with a TouchSuite specialist, or review dozens of helpful articles in our knowledgebase.

To access support:

1. Touch any blank area on the NavBar.
2. Select the ‘Support’ tab.
3. Tap any section or file name and press ‘Enter’ on your keyboard.
4. Use the Support NavBar at the bottom of the support screen to navigate to different pages. (Use the scroll bar to move the page down).

5. Touch ‘Close’ at the bottom of the pop-up when finished.



Register Register a new account to submit new Tickets or manage subscriptions.

Submit a Ticket Submit a new issue to a Department.

Knowledgebase View categorized listing of all common frequently asked questions.

Troubleshooter Take a step-by-step tour to find the solution to all your issues.

News View latest company news and announcements.

Downloads View our categorized library of downloads for all necessary manuals, software, etc.

Latest Knowledgebase Articles	Date Added
TouchSuite Salon User Manual Addendum 062808	03 Jul 2008 10:07 AM
TouchSuite Must Read/Watch List	15 Apr 2008 02:24 PM
TouchSuite Salon Get Going Guide	28 Mar 2008 10:49 AM
TouchSuite EMail Setup	17 Mar 2008 01:59 PM
TouchSuite Merchant Account Information	17 Mar 2008 01:50 PM
TouchSuite: Secure Broadband and Network	17 Mar 2008 01:43 PM
TouchSuite QuickSetup Video	11 Mar 2008 12:24 PM

» November 04: VERSION 2.0 IS HERE!!!

» September 18: TOUCHSUITE SALON 2.0

» September 18: TouchSuite News is born!

NOTE: You do NOT need to create a Login to use TouchSuite Support. The Login section on this page can be disregarded.

Release Notes

Release Notes give you details on new features added to TouchSuite in each software upgrade.

To view release notes for any TouchSuite software release:

1. Touch any blank area on the NavBar.
2. Select the ‘Release Notes’ tab.
3. Choose a release version number (the highest number is the latest software release).
4. Use the scroll bar at page right to move page up and down.
5. Touch ‘Close’ at bottom of pop-up when finished.

Building Your Database

Use the following 7 steps (in the order listed) to get going:

> NOTE: You may have completed a few of these steps in the startup wizard.

STEP 1 – Set Up Passcode

Make sure you add yourself as a staff member with 'SuperUser' status and 'manager' employee type, and select a unique 4-digit passcode. (You will need this passcode to enter certain sections). To set up your logon passcode:

1. Touch 'Staff' on the Home Screen.
2. Touch 'New Staff' on the NavBar.
3. Fill out the form.
4. *Employee Type:* choose 'Manager'. (Note: Manager is needed to use the Till feature.)
5. *Access Role*: choose 'SuperUser'
   (NOTE: The access role determines which sections of the program this staff member will be able to access. See Chapter 4: 'Staff' / Set Access Role for further instructions).
6. Enter a unique 4-digit number in the Passcode box.
7. Touch 'Save'.

STEP 2 – Set Up Services

Your system is pre-loaded with sample data; keep what you like, make adjustments, or just delete for your store.

> NOTE: Touch 'Services' on the Home Screen to go to Service List.

Add New Service

1. Touch ‘New Service’ on the NavBar.
2. Fill out the form.
3. Touch ‘Save’.
4. Repeat as desired.

NOTE: *Deducted Cost* is money subtracted from staff commissions (useful for charge-backs). Enter $0.00 in this field if you do not wish to take money off the top for this service.

Helpful Hint: If you add all your staff into the system first, as you add new services you can add them to the staff at that time.

Delete Service

1. Touch a Service on the Service List.
2. Touch the ‘Service Details’ tab at page bottom.
3. Touch ‘Delete’.
4. Press ‘OK’ when prompted.

Edit Service

1. Touch a Service on the Service List.
2. Touch the ‘Service Details’ tab at page bottom.
3. Make changes.
4. Touch ‘Save’.

NOTE: Touch ‘Service List’ or ‘Home’ on the NavBar when finished.

STEP 3 – Set Up Staff

NOTE: Touch ‘Staff’ on the Home Screen to go to the Staff List.

Add New Staff Member

1. Touch ‘New Staff’ on the NavBar.
2. Fill out the form.
3. Touch ‘Save’.
4. Touch the ‘Contact Information’ sub-tab.
5. Fill out the form.
6. Fill out the forms for each sub-tab as desired.
7. Touch ‘Save’.

Add/Edit Staff Services

1. Touch a staff member row on the Staff List.
2. Touch the ‘Staff Details’ tab at page bottom.
3. Touch the ‘Services’ sub-tab.
4. Move services back and forth based on what the Staff member can do by touching the arrow buttons.
    a. *All* services are on the left.
    b. The *staff member’s* services are on the right.
5. Touch ‘Save’.
6. Touch ‘Staff List’ or ‘Home’ on the NavBar when finished.
7. Repeat for other staff members.

Add/Edit Staff Work Schedules

1. Touch the ‘Schedules’ tab at page bottom.
2. Select a staff member in the left-hand column.
3. Adjust the schedule.
4. Choose how long to repeat this schedule.

5. Touch ‘Save Schedule’.

NOTE: Touch ‘Staff List’ or ‘Home’ on the NavBar when finished.

STEP 4 – Set Up Vendors

NOTE: Touch ‘Vendors’ on the Home Screen to go to the Vendor List.

Add New Vendor

1. Touch ‘New Vendor’ on the NavBar.
2. Fill out the form.
3. Touch ‘Save’.
4. Repeat as desired.

Set Your Default Vendor

1. Touch a vendor on the Vendor List main page.
2. Touch the ‘Details’ tab at page bottom.
3. Touch the ‘Default Vendor’ check box.
4. Touch ‘Save’.

NOTE: Touch ‘Vendor List’ or ‘Home’ on the NavBar when finished.

STEP 5 – Set Up Products

NOTE: Touch ‘Products on the Home Screen to go to Product List.

Hint: Be sure to review the Products chapter for more information regarding setting up products. You may want to go back and setup your products more thoroughly with the rich features that allow you to track your product sales in great detail. (Customized Fields and Categories)

Add Product

1. Touch ‘New Product’ on the NavBar.
2. Scan the product’s bar code or type in the 12 to 14 digit number manually into the SKU field. (TouchSuite can also auto-generate a SKU number for you if your product does not have a barcode. Simply touch the ‘Generate SKU’ button near the SKU field).
3. Fill in the Product Details form.
4. Fill in each sub-tab as desired. (Note: The ‘Inventory’ sub-tab allows you to enter your inventory numbers using the ‘Add to Inventory’ field.)
5. Touch ‘Add Vendor’ and touch a vendor in the list. (Note: If you set a default vendor up then you do not need to do this step.)
6. Touch ‘Save’.
7. Repeat this process as desired.

NOTE: If you are entering a list of products that are very similar to each other, you can use the ‘Clone’ button. A new product will be started with info carried over from the original one. Then you may edit as desired, and save the new product.

NOTE: Another method to add product in quickly is to use the Receiving Manager. Refer to the ‘Receiving Manager’ section in the Products chapter.

NOTE: Touch ‘Product List’ or ‘Home’ on the NavBar when finished.

STEP 6 – Set Up Clients

NOTE: Touch ‘Clients’ on the Home Screen to go to the Client List.

Add Client

1. Touch ‘New Client’ on the NavBar.
   (You will be taken to the new ‘Client Card’ sub-tab).
2. Fill out the form.
3. Touch ‘Save’.
4. Or you can touch ‘Save New’ to enter one client after the next.

NOTE: You must at least enter a ‘Client First Name’. You may go back at a later time to enter additional data.

NOTE: Touch ‘Client List’ or ‘Home’ on the NavBar when finished.

STEP 7 – Book First Appointment

Book Appointment

1. Touch ‘Book’ on the home screen.
2. Touch a date.
   (Staff members working that day are across the top, hours of the day are down the side).
3. Touch a desired time block for a Staff member.
   (Appointment Builder appears).
4. Select a client from the Client List.
5. Select service(s) from the Service List.
6. Touch ‘Save’.

3 Clients

Clients is designed for simple customer management. It also includes integrated tracking tools that work behind the scenes to maximize scheduling and marketing.

Tabs at the bottom of the page help you navigate: *Client List* and *Details.* The *Details* view shows you the details of a particular client selected from a list. Sub-tabs help you navigate to the specific information you are looking for: *Client Card, Client Information, Personal Information* and *History*.

To the left of the client list is a *Display Panel* where you can view a client's appointments as well as view all clients on the *Waiting List*. (See instructions for these features on the following pages).

Add Client

To add a new client to the database:

1. Touch 'Clients' on the home screen.
2. Touch 'New Client' on the NavBar.
3. Touch a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press the 'Tab' button on the keyboard to go to the next field (or select a different field by tapping it).
6. Select sub-tab at page bottom (i.e. Client Card, Contact Info, Personal Info, History) to enter additional data.

7. Touch ‘Save’ when finished. (Or you may touch ‘Save & New’ to enter one client after the next).

NOTE: You must at least enter a ‘Client First Name’. You may go back at a later time to enter additional data.

To view a client’s details:

1. Touch ‘Clients’ on the home screen.
2. Use the scroll bar to find the desired customer
3. Touch the desired client row.
4. Touch the ‘Details’ tab at page bottom.
5. Select a sub-tab at page bottom (i.e. Client Card, Contact Info, Personal Info, History) to view each section.
6. Touch ‘Client List’ when finished to return to the Client List.

Edit Client

To edit an existing client:

1. Touch ‘Clients’ on the home screen.
2. Use the scroll bar to find the desired customer
3. Touch the desired client row.
4. Touch the ‘Details’ tab at page bottom.
5. Tap a text field you wish to edit.
6. Type information into the field using the keyboard.
7. Select a sub-tab at page bottom (i.e. Client Card, Contact Info, Personal Info, History) to edit additional data.
8. Touch ‘Save’ when finished.

Delete Client

To delete an existing client:

1. Touch ‘Clients’ on the home screen.

2. Use the scroll bar if necessary to find the desired customer.
3. Touch the desired client row.
4. Touch the 'Details' tab at page bottom.
5. Touch 'Delete' on the NavBar
6. Press 'OK' when prompted by the system.

NOTE: If you accidentally delete a client, they can be reactivated. See the Back Office instructions in the 'Summary' section.

Sort Clients

You can easily sort your client list by any of the column headers on the page (e.g. first name, last name, etc.) To sort your client list:

1. Touch 'Clients' on the home screen.
2. Tap a column title (e.g. first name) on the page.
3. Tap the same column title to return to the original format.

Add Photo

To add a photo for an existing client:

1. Touch 'Clients' on the home screen.
2. Use the scroll bar to find the desired client.
3. Touch the desired row.
4. Touch the 'Details' tab at page bottom.
5. Insert the memory stick with the stored photos into the front panel of the monitor.
6. Touch 'Import Photos' on the lower right-hand side of the screen. (The first photo on the memory stick will automatically appear. If it does not, touch 'Load Images').
7. Touch the desired client name in the client list box.
8. Touch 'Next' or 'Previous' to view each photo on the memory stick.

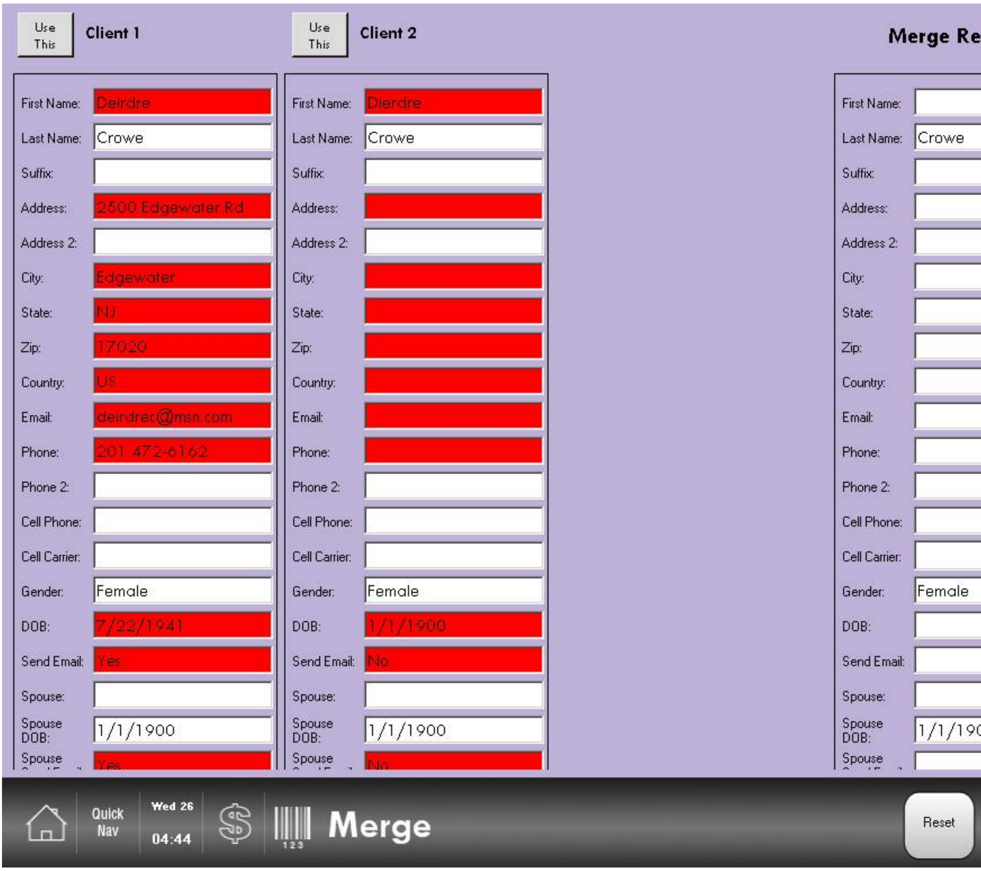
9. Touch ‘Save’ to add each selected photo to the client’s gallery.
10. Repeat steps 8 and 9 until finished.
11. Remove memory stick.

Merge Client Cards

If you have duplicate clients in your database, simply merge the data into one client card.

To merge client data:

1. Touch Clients on the home screen.
2. Touch a client name (a checkbox appears at the right hand side of this row).
3. Touch the duplicate name (a checkbox appears at the right hand side of that row as well).
4. Touch ‘Merge’ at page bottom right.
5. A new screen will appear with the client name/info in Column 1 and the duplicate client/name info in Column 2. (Data discrepancies are highlighted in red).
6. Choose which one has the most and best data and then Touch ‘Use This / Client 1 or 2’ to carry over info from that chosen column to the ‘Merge Results’ column.
7. Scroll down and tap on any row of either column to bring the data into the ‘Merge Results’ column. Repeat until all the data is in the ‘Merge Results’ column.
8. Edit ‘Merge Results’ column as desired. (History info from both
files will be merged automatically).
9. Touch ‘Save’ when finished.



	Client 1	Client 2	Merge Re
First Name:	Deirdre	Dierdre	
Last Name:	Crowe	Crowe	Crowe
Suffix:			
Address:	2500 Edgewater Rd		
Address 2:			
City:	Edgewater		
State:	NJ		
Zip:	17020		
Country:	US		
Email:	deirdrec@msn.com		
Phone:	201 472-6162		
Phone 2:			
Cell Phone:			
Cell Carrier:			
Gender:	Female	Female	Female
DOB:	7/22/1941	1/1/1900	
Send Email:	Yes	No	
Spouse:			
Spouse DOB:	1/1/1900	1/1/1900	1/1/190
Spouse	Yes	No	

Make Appointment

You can schedule a New Appointment directly from the client page. This is useful, as the computer will remember where you started and automatically fill in appointment data.

To schedule an appointment for an existing client:

1. Touch ‘Clients’ on the home screen.

2. Use the scroll bar to find the desired customer.
3. Touch the desired client row.
4. Touch 'Appt' on the NavBar.
   (If there is an existing appointment for this client, an appointment info pop-up will appear. You can simply select 'New' to add another appointment. If there is no existing appointment, you will go directly the 'month view' to select a date).
5. Touch the desired appointment day.
6. Touch the desired appointment time block.
7. Select a service from the list menu.
8. If desired, select additional service.
9. Touch 'Save' when finished.

NOTE: To *remove* a service from an appointment, just tap the unwanted service in the *Booked Service List* and touch *Remove.*

NOTE: If a client has an Existing Appointment, then info about that appointment will be displayed when tapping Appt (and related menu options will become available).

Edit Appointment

From the Book

To edit an appointment from the Book, please refer to the instructions in Chapter 7 'Book'.

From the Client List

To edit an appointment from the client list:

1. Touch 'Clients' on the home screen.
2. Touch the desired client row.
3. Touch 'Appt' on the NavBar.
   (An appointment info pop-up will appear).

4. If there is an existing appointment for this client, the appointment popup will display. Select the appointment you want to modify.
5. Select ‘Modify’ on the pop-up.
6. Edit the appointment.
7. Press ‘Save’ when finished.

Add Client to Waitlist

You can add a client to a waitlist if you are unable to book them for an appointment they would like.

To add a client to a waitlist:

1. Touch ‘Clients’ on the home screen.
2. Use the scroll bar to find the desired customer.
3. Touch the desired client row.
4. Touch ‘Add to Waitlist’ on the bottom left-hand side of the page.
5. Select a staff from the drop down menu.
6. Press ‘Save’ when finished.

NOTE: The waitlist is for your reference only. Clients on the waitlist are not scheduled automatically. You should check the waitlist anytime an appointment is cancelled in the Book to try and fill the open time block. You may also view the Waitlist Report in *Reports*. **Future versions will have the waitlist available on the book view. Check the ‘Enable Wait List’ in the BackOffice System Preferences sub-tab.

Remove Client from Waitlist

To remove a client from the waitlist:

1. Touch ‘Clients’ on the home screen.
2. Touch the desired customer name inside the waitlist box.
3. Touch ‘Delete from Waitlist’.

Send E-Mail to Client

You can send an e-mail to a selected client directly from the client list summary page.

To send a client e-mail:

1. Touch ‘Clients’ on the home screen.
2. Select a client from the Client list.
3. Touch ‘Send Email’ on the NavBar.
   (the email address fills in automatically if available).
4. Type in a subject and message.
5. Press ‘Send Email’.

NOTE: You can also send e-mails to a group recipient list based on selected criteria. To do this, follow the instructions in Chapter 10: ‘Marketing’ for Create Email and Create Distribution List.

Print Client Card

To print a client card:

1. Touch ‘Clients’ on the home screen.
2. Touch the desired client name (use the scroll bar if necessary).
3. Touch ‘Print Client Card’ on the Tab Bar.

Print Client List

To print the client list:

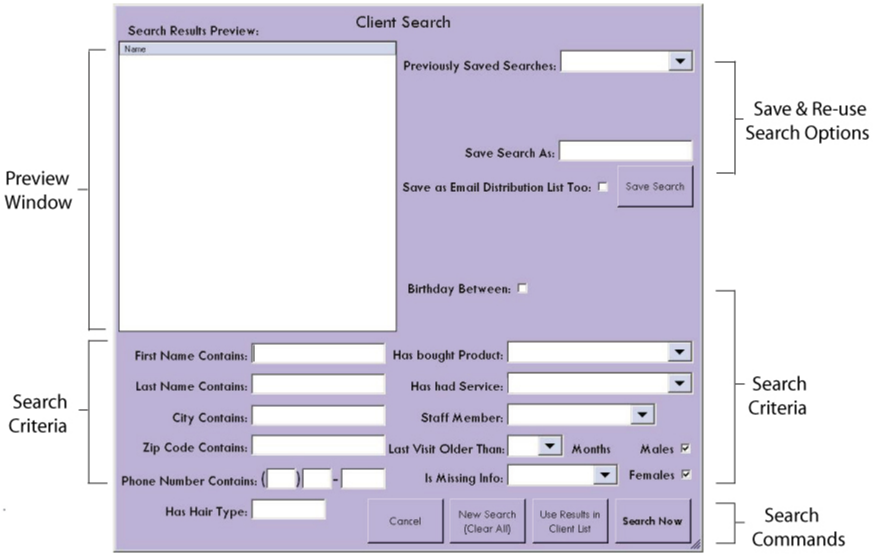
1. Touch ‘Clients’ on the home screen.
2. Touch ‘Print List’ on the Tab Bar.

Client Search

Client Search allows you to generate a list of existing clients who fit specified criteria (eg, clients in a specific area code, clients who have purchased a particular product/service). You can then save, print or use the list for email or texting.

To conduct a client search:

1. Touch ‘Clients’ on the home screen.
2. Touch ‘Client Search’ on the NavBar. (The Client Search pop-up appears).
3. Enter your search criteria on the lower half of the pop-up. (Use the drop downs or type directly into a field. The resulting list will only include clients who meet ALL the criteria). (Use a Previously Saved Search by selecting from the top-right drop-down).
4. Touch the ‘Search Now’ button at bottom of the pop-up. (In a moment, your list will appear in the Preview window).
5. Touch ‘Use Results in Client List’ to proceed. (You can then print this list or start an email or text).



NOTE: To save a Client Search, type a name in the ‘Save Search As’ field (eg, April Birthdays, etc). Press ‘Save Search’ to keep and use this list at any time.

4 Staff

Staff is designed for simple employee management.

The main view is the *Staff List*, a summary list of all staff members. On each staff/technician's row, you will see an abbreviated schedule, with asterisks (*) by hour, denoting if there is an existing appointment booked for that staff.

To the left of the staff list is a *Display Panel* which allows you to manage a selected staff's waitlist. It also displays a photo of the selected staff (if you have imported a photo). (See instructions for these features on the following pages).

Tabs at the bottom of the page help you navigate Staff: *Staff List, Details, Schedule,* and *Reports.*

The *Details* view shows you all data on a particular staff member. Sub-tabs help you navigate to the specific information you are looking for: *Employee Information, Contact Information, Personal Information, Preferences*, *Services, Credit Cards* and *Financial Reports*.

Add Staff Member

To add a new staff member to the database:

1. Touch 'Staff' on the home screen.
2. Touch 'New Staff' on the NavBar.

3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press ‘Tab’ on the keyboard to go to the next field. (Or select a different field by tapping it).
6. Set the Staff member’s Access Role (see next section)
7. Select another ‘Tab’ at page bottom (i.e. Employee Info, Contact Info, Personal Info, Preferences, Services, Credit Cards) to enter additional data.
8. Touch ‘Save’ when finished.

NOTE: *First Name*, *Employee Type* and *Passcode* are mandatory fields. These must be entered before you are able to save the new staff data.

Set Staff Access Role

The Access Role determines which areas of the program a staff member has access to. (e.g., if you don’t want them to have access to your financial Reports but you do want them to be able to book appointments). You can choose from a number of different access levels (Guest User, Staff I, Staff II, Admin I, Admin II, Super User). For a description of these access levels touch ‘Access Role’ near the last text box and review the pop-up chart:

To set a staff member’s access role:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired Staff member’s row.
3. Touch the ‘Details’ tab at page bottom.
4. Select an Access Role from the drop-down list at the bottom center of the page. (For a description of these access levels, touch ‘Access Role’ directly above the drop-down list. Then ‘Close’ pop-up).
5. Press ‘Save’ when finished.

View Staff Member Details

To view a staff member's details:

1. Touch 'Staff' on the home screen.
2. Touch the desired staff member's row.
3. Touch the 'Details' tab at page bottom.
4. Select a 'Tab' at the bottom of the screen (i.e. Employee Info, Contact Info, Personal Info, Preferences, Services) to view each section.
5. Touch 'Staff List' when finished to return to the Staff List.

Edit Staff Member

To edit an existing staff member:

1. Touch 'Staff' on the home screen.
2. Touch the desired staff member row.
3. Touch the 'Details' tab at page bottom.
4. Select a 'Tab' at the bottom of the page.
5. Tap a text field you wish to edit.
6. Type information into the field using the keyboard.
7. Repeat steps 4 thru 6.
8. Touch 'Save' when finished.

Set Preferences for Staff Member

To set preferences for an existing staff member:

1. Touch 'Staff' on the home screen.
2. Touch the desired staff member row.
3. Touch the 'Details' tab at page bottom.
4. Select the 'Preferences' sub-tab at the bottom of the page.
5. Tap the checkbox next to the preference you would like to set. (To uncheck this box, simply tap again).
6. Touch 'Save' when finished.

NOTE: If you enable ‘Staff Appointment Text Messages to Cell Phone’ please note that their provider’s messaging rates still apply.

NOTE: The ‘Show This Employee In The Book’ checkbox is in the Preferences tab. The default is checked, so if you do not want the employee to show up on the appointment book you must uncheck this box.

Set Services for Staff Member

You can customize the service list (including service time needed and any special pricing) for each staff/technician. The system will remember this information when you book an appointment for this staff.

NOTE: When a new staff member is added, they have no services associated with them (except for a few sample services that come with the system). So you must set up this list before you are able to book appointments for them. Alternatively, you can add the services to the staff when creating your services.

To customize a service list for each staff member:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff member row.
3. Touch the ‘Details’ tab at page bottom.
4. Select the ‘Services’ sub-tab at the bottom of the page.
5. Add house services from the left hand-side of the page to the employee’s list on the right by tapping a service and using

the add arrow (>). Or remove services from the employee’s list on the right by tapping a service and using the remove arrow (<).

6. Now select a service in the employee’s list you wish to customize.
7. Update the time needed to perform the service as well as any special pricing in the text fields below the list box.
8. Touch ‘Update Employee Service’ when finished.

Add Staff Merchant Account (for multi-MID Locations)

To enter a staff member’s merchant account:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff member row.
3. Touch the ‘Details’ tab at page bottom.
4. Select the ‘Credit Card’ sub-tab at the bottom of the page.
5. Enter the Staff Merchant Account Info provided by your TouchSuite agent.
6. Touch ‘Save’ on the NavBar when finished.

View Staff Financials

Staff members can access their own financial reports directly from the staff section:

To view staff member financials:

1. Touch 'Staff' on the home screen.
2. Touch the ‘Reports’ tab at page bottom.
3. Enter the staff member's passcode.
4. Select the desired date range from the top right drop-down lists.
5. Touch the desired report name.

(The report will be displayed on screen in a few moments).

Set Schedule for Staff Member

Staff Schedule is where you set the weekly work schedule for each staff member. If their schedule is consistent from week to week, you can simply select a schedule repeat for a specified period of time. You can also make one-time adjustments for any staff member if, for example, that employee wants to work on a day they usually don't. Importantly, if an employee is not scheduled on a particular day, their name will not appear in the book for that day, and no appointments can be made for them.

NOTE: If you select 'Default to Business Hours', your staff will have the same schedule as your regular business hours. Work schedules are customizable at any time.

To set a staff member's schedule:

1. Touch 'Staff' on the home screen.
2. Touch the 'Schedule' tab at page bottom.
3. Touch an employee on the left-hand side list box.
4. Set their start and end times for each day using the drop down menus next to each day of the week.
5. Select a frequency for this schedule to repeat.
6. Press 'Save Schedule' when finished.

To set an alternating-week schedule for a staff member:

1. Touch 'Staff' on the home screen.
2. Touch the 'Schedule' tab at page bottom.

3. Touch an employee on the left-hand side list box.
4. To the right of the current week schedule, check the box for ’14-day schedule’.
5. Set the start and end times for each day using the drop down lists.
6. Select a frequency for this schedule to repeat.
7. Press ‘Save Schedule’ when finished.

Sort Staff Members

You can easily sort your staff list by any of the column headers on the page (e.g. first name, last name, etc.) To sort your staff list:

1. Touch ‘Staff’ on the home screen.
2. Tap a column title (e.g. first name) on the page.
3. Tap the same column title to return to the original format.

Add Photo

To add a photo for an existing staff:

1. Touch ‘Staff’ on the home screen.
2. Touch the ‘Details’ tab at page bottom .
3. Insert the memory stick with the stored photos into the front panel of the monitor.
4. Touch ‘Import Photos’ on the lower right-hand side of the screen. (The first photo on the memory stick will automatically appear. If it does not, touch ‘Load Images’).
5. Touch the desired staff member in the staff list box.
6. Touch ‘Next’ or ‘Previous’ to view each photo on the memory stick.
7. Touch ‘Save’ to add each selected photo to the staff member’s gallery.

8. Repeat steps 6 and 7 until finished.
9. Remove memory stick.

Make Appointment

To schedule an appointment from the staff page:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff row.
3. Touch ‘Appt’ on the NavBar.
   (This will take you to the ‘month view’).
4. Touch the desired appointment day.
   (This will take you to the ‘day view’).
5. Touch the desired appointment time block under staff.
6. Select a client from the drop-down menu.
7. Select a service from the list menu.
8. If desired, select an additional service.
9. Touch ‘Save’ when finished.

NOTE: To *remove* a service from an appointment, just tap the unwanted service in the *Booked Service List* and touch *Remove.*

Edit Appointment

To edit an appointment, please refer to the instructions in Chapter 7 ‘Book’.

Add to Staff’s Waitlist

To add a client to a staff’s waitlist:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff’s row.
3. Touch ‘Add to Client’ on the bottom left-hand side of page.

4. Select a client from the drop down menu.
5. Press ‘Save’ when finished.

NOTE: The waitlist is for your reference only. Clients on the waitlist are not scheduled automatically. You should check the waitlist anytime an appointment is cancelled in the Book to try and fill the open time block. You may also view the Waitlist Report in ‘*Reports’ on the Book tab.*

View Staff Week

You can easily view appointments for the staff for one week.

To view a staff’s week:

1. Touch the ‘Week’ button on the NavBar.
2. If needed, navigate to other weeks by tapping the ‘+ / – ‘buttons.

Print Daily Sheet

You can print a daily sheet for any selected staff with scheduled appointments.

To print a daily sheet:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff’s row.
3. Touch ‘Print Dailys’ on the NavBar.
4. Daily Sheet will print from the receipt printer.

NOTE: You can also print daily sheets for all staff members with scheduled appointments directly from today’s book. See Chapter 7 ‘Book’ for instructions.

Delete Staff Member

To delete an existing staff member:

1. Touch ‘Staff’ on the home screen.
2. Touch the desired staff member row.
3. Touch the ‘Details’ tab at page bottom.
4. Touch ‘Delete’.
5. Press ‘OK’ when prompted by the system.

NOTE: If this staff has appointments already booked in the system, you should move or cancel these appointments to ensure proper customer service before deleting the staff member.

NOTE: Their passcode will not be able to be used again once they are deleted. Also make sure to run all staff payout reports *before* deleting a staff member.

NOTE: if you accidentally delete a staff member, they can be reactivated. See the Back Office section under ‘Summary’ for instructions.

5 Services

Services is designed for simple service management.

The main view is a *Service List*, a summary of all services you offer. Tabs at the bottom of the page help you navigate Services: *Services List* and *Details.* The *Service Details* view uses a simple layout for easy management.

Add Service

To add a new service to the database:

1. Touch ‘Services’ on the home screen.
2. Touch ‘New Service’ on the NavBar.
3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press ‘Tab’ on the keyboard to go to the next field (or select a different field by tapping it).
6. Select a standard time/duration for the service from the drop-down menu. OR type the number of days if this service spans days such as training.
7. Select a tax option if applicable.
8. If desired, select staff member(s) who can perform this service. (Their individual service lists will be updated with this new info).
9. Touch ‘Save’ when finished.

NOTE: *Service Name* and *Standard Time* are mandatory fields. Both must be entered before you are able to save the new service data.

NOTE: *Deducted Cost* is money subtracted from staff commissions (useful for charge-backs). Enter $0.00 in this field if you do not wish to take money off the top for this service.

NOTE: *Withholding* is money withhold per staff for various things such as education or training. See chapter 4 ‘Staff’ for more information.

Edit Service

To edit an existing service:

1. Touch ‘Services’ on the home screen.
2. Use the scroll bar if necessary to find the desired service.
3. Touch the desired service row.
4. Touch the ‘Details’ tab at page bottom.
5. Tap a text field you wish to edit.
6. Type information into the field using the keyboard.
7. Repeat steps 5 and 6.
8. Touch ‘Save’ when finished.

NOTE: Reports will be affected by this change. It is not recommended that you edit a *service name* unless you would like all reports for dates past and present to use this new name. Try creating a new service instead. Updating house pricing and service duration only affects future bookings.

Delete Service

To delete an existing service:

1. Touch ‘Services’ on the home screen.
2. Use the scroll bar if necessary to find the desired service.
3. Touch the desired service row.
4. Touch the ‘Details’ tab at page bottom.
5. Touch ‘Delete’.
6. Press ‘OK’ when prompted by the system.

Set Service as Taxable/Non-taxable

1. Touch ‘Services’ on the home screen.
2. Touch the desired service row.
3. Touch the ‘Details’ tab at page bottom.
4. Check [√] the box for each tax that is applicable. (To un-check, simply tap the box again).
5. Touch ‘Save’ on the NavBar.

Sort Services

You can easily sort your service list by any of the column headers on the page (e.g. service name, price, etc.) To sort your service list:

1. Touch ‘Services’ on the home screen.
2. Tap a column title (e.g. service name) at the top of the page.
3. Tap the same column title to return to the original format.

Packages & Bundles

<u>Package</u>: A group of services sold at once, used over time
(e.g. 5 Tanning Sessions).

Bundle: A group of products and/or services sold at discount, used right away (e.g. Women's Haircut, Redken Styling Product Set).

Package Manager*

Create and sell pre-paid service packages, and track them via Gift Cards. *Requires TouchSuite Gift Card account.

Create Package

To create a package:

1. Touch 'Services' or 'Products' on the home screen.
2. Touch 'Packages & Bundles' on the NavBar.
3. Touch the 'Package' radio button at top left of form.
4. Assign a SKU number (Touch 'Generate SKU' to have TouchSuite automatically assign a barcode number for this package. You can print this barcode later).
5. Enter a Name for this package.
6. Continue filling out the form (Make sure you have the correct 'Retail Price' and 'Taxable Price' for this Package).
7. Assign Services to Package as desired at top right window
    a. To add a service select 'Add a Service', highlight a service, and touch 'Add'.
    b. Edit the new line item in the Reference Window as desired. You can adjust Commission amount (the selling price the system will use to calculate commission) and Quantity (number of these services included in the package).
    c. Repeat to add other services. Press 'Finish'.
8. Touch 'Save' on the NavBar when finished.

Sell Package

To sell a package:

1. In Cash Register, simply add the Package as a line item.
    a. Use the ‘Search’ button on the NavBar.
    b. Touch 'Show Packages' at top left, and select the desired Package name on the list.
    c. Touch 'Add Pre-Pay' option (packages must be pre-paid in full).
    d. Touch 'Use'.
2. Take payment as usual.
3. Touch ‘Finish Transaction’ (The system will now ask you to scan a new Gift Card; package info goes on the gift card).
4. Simply schedule the services in the book as desired.

Redeem/Consume Package

As customer uses package, they simply hand their Gift Card to the receptionist at each Checkout. See instructions for ‘Redeem Gift / Gift Payments’ in Chapter 8: Cash Register. (TouchSuite keeps track of services used, services remaining).

Check Balance

Simply check the Gift Card balance as usual. (The pop-up now displays all package services and/or dollar amounts left on the card).

Bundle Manager

You can now create and sell bundled products and/or services at a discount. Bundles are typically used for same-day checkout.

Create Bundle

To create a discount bundle:

1. Touch ‘Products’ or ‘Services’ on the home screen.
2. Touch ‘Packages & Bundles’ on the NavBar.
3. Touch the ‘Bundle’ radio button at top left of form.
4. Assign a SKU number (Touch ‘Generate SKU’ to have TouchSuite automatically assign a barcode number for this package. You can print this barcode later).
5. Enter a Name for this package.
6. Continue filling out the form (Make sure you have the correct ‘Retail Price’ and ‘Taxable Price’ for this Package).
7. Assign Products and/or Services to Bundle as desired at top right window.
   a. To add a service select ‘Add a Service’, highlight a service and touch ‘Add’. You can continue to add others. Press ‘Finish’ when done.
   b. To add a product select ‘Product Search’, type your desired product name, highlight the desired product in the window, and touch ‘Add’. Repeat to add others. Press ‘Finish’.
8. Touch ‘Save’ on the NavBar when finished.

Schedule Bundle

Simply schedule any bundled service(s) in the Book as usual.

Checkout Bundle

To take payment:

1. In Cash Register, simply add the Bundle as a line item. (Use the ‘Search’ button, a custom QuickButton or Scan the bundle barcode to do this).

2. Take payment as usual.

6 Products

Products is designed for simple inventory management.

The main view is the *Product List*, a summary of all products in your inventory. The items in black are those that are well stocked. The items in red are running low and should be re-ordered soon. You can sort this list by checking a box at the bottom of the screen to show only professional ‘Shop’ supplies, ‘Retail’ products, products that are used ‘Both’ for supplies and retail sale, or a list of ‘All’ products.

You can see a product’s details by scrolling to the desired name, tapping that row, then press ‘Product Details’ tab at page bottom.

The *Product Details* view uses a simple layout for product management.

Customize Product Categories and Fields

Before adding products to your database, you will want to customize the information you track using custom *Product Categories* and *Fields.*

Custom Categories

To create your custom product categories:

1. Touch Products on the home screen.
2. Touch the ‘Category’ sub-tab at page bottom.

3. Create new Product Categories in the left-hand column (e.g. Hair); simply type your desired category title in an available text field. Select a custom background color for this category using the center drop-down list.
4. Create Subcategories in the right-hand column (e.g. Shampoos); simply type desired subcategory title in an available text field.
5. Touch ‘Save’ when finished.

NOTE: You must assign a category and subcategory to each product in your database in order for them to appear in the appropriate lists in Visual Ticket Builder. Refer to Visual Ticket Builder instructions in Chapter 8: Cash Register. Visual Ticket Builder is an optional tool.

Customize Fields

To create your custom product fields.

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Details’ tab at page bottom.
4. Touch the ‘Description’ sub-tab at page bottom.
5. Touch ‘Field Setup’ at lower page right.
6. Enter a Name for the type of information you want to track (e.g. Flavor, Length, Color, etc) in each available custom field.
7. Touch ‘Save’ when finished.

NOTE: When setting up Product Fields you should keep in mind that these will be used for all products. Therefore, you will want to choose names that work seamlessly across all your product types and categories.

Add Product

Add By Scanning

To add a new product into the database using the barcode scanner:

1. Touch ‘Products’ on the home screen.
2. Touch ‘New Product’ on the NavBar. (The cursor should already be in the SKU field).
3. Hold the barcode scanner in front of the barcode on the product. (The cursor should already be in the SKU field).
4. Press the button/trigger on the rear of the barcode scanner until you hear a beep. (The SKU number should now appear on screen).

NOTE: If your product does not have a barcode, you can have TouchSuite automatically generate one for you. Simply touch ‘Auto Generate’ next to the SKU field and your product will be assigned a SKU number. Then review section on Print Labels & Barcodes within this chapter.

5. Tap a text field you wish to type additional information into, and type information into the field using the keyboard.
6. Press ‘Tab’ on the keyboard to go to the next field (or select a different field by tapping it).
7. Touch another tab at page bottom (*Description, Cost/Price, Inventory, Bulk, Modifiers)* to enter additional info about this product.
8. Touch the ‘Inventory’ tab, and touch ‘Add Vendor’ at page center to associate this product with at least one vendor. (If you have set-up a default vendor, the default vendor will already be associated with this product. You can edit this information as necessary. Please see instructions on setting up a default vendor in Chapter 9: ‘Vendors’).
9. Touch ‘Save’ when finished.

NOTE: *Product Name, Retail Price* and *Vendor* are mandatory fields. All must be entered before you are able to save the new product data.

NOTE: ADD TO INVENTORY vs. ON HAND NOW
Add to Inventory refers to the quantity of items you just received from your vendor that you will now add to the database.
On Hand Now is automatically generated based on data TouchSuite already knows.

NOTE: The *SKU* number refers to the UPC Barcode on the product and is 12 to 14 digits long (depending on country of origin). SKU includes the number on the sides of the barcode, as well. In the example below, the SKU number is: 125002741350.

1 25002 74135 0

Add By Cloning

To add a new product that is very similar to an existing product in your database, you can use the Clone feature.

To add a new product by cloning:

1. Touch 'Products' on the home screen.
2. Touch a Product on the list that you would like to Clone.
3. Touch 'Clone' on the NavBar.
   (A New Product will be started with info carried over from the original one).

4. Now edit the information for the new product as desired.
5. Touch ‘Save’ when finished.

Edit Product

To edit an existing product:

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Details’ tab at page bottom.
4. Tap a text field you wish to edit, and type information into the field using the keyboard.
5. Touch another sub-tab at page bottom (*Description, Cost/Price, Inventory, Bulk, Modifier)* to enter additional info about this product.
6. Repeat steps 5 and 4.
7. Touch ‘Save’ when finished.

Update Existing Products with Categories

To update your existing products so they appear in the proper categories in Visual Ticket Builder:

1. Touch Products on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Details’ tab at page bottom.
4. Select the desired ‘Category’ and ‘Subcategory’ from the drop-downs.
5. Touch ‘Save’ when finished.

Create Custom Modifier(s)

Modifiers are popular in restaurants (e.g. extra sauce, no onions). Use them for pet salon and spa products in the Visual Ticket Builder however you like. Modifiers will appear at the center of the Ticket Builder at checkout.

To create custom modifier(s).

1. First create a modifier as a regular ‘new product’ per the instructions within this chapter.
2. Touch the ‘Details’ tab at page bottom.
3. Touch the ‘Modifier(s)’ sub-tab at page bottom.
4. Check [√] the “Is A Modifier” box at page top left.
5. Assign this modifier to:
   a. All Products: Check [√] the ‘Assign To All Items’ box at top.
   b. Select Category(s): Touch the ‘Assign By Category’ button at page top center, highlight desired categories, touch ‘Assign’.
   c. Select Product(s): Touch the ‘Search’ button at page bottom center. Search for product, highlight, and touch ‘Use’. Repeat as desired. Touch ‘Finish’ when done.
6. Touch ‘Save’ at page bottom right.

Apply Automatic Product Promotion at Checkout

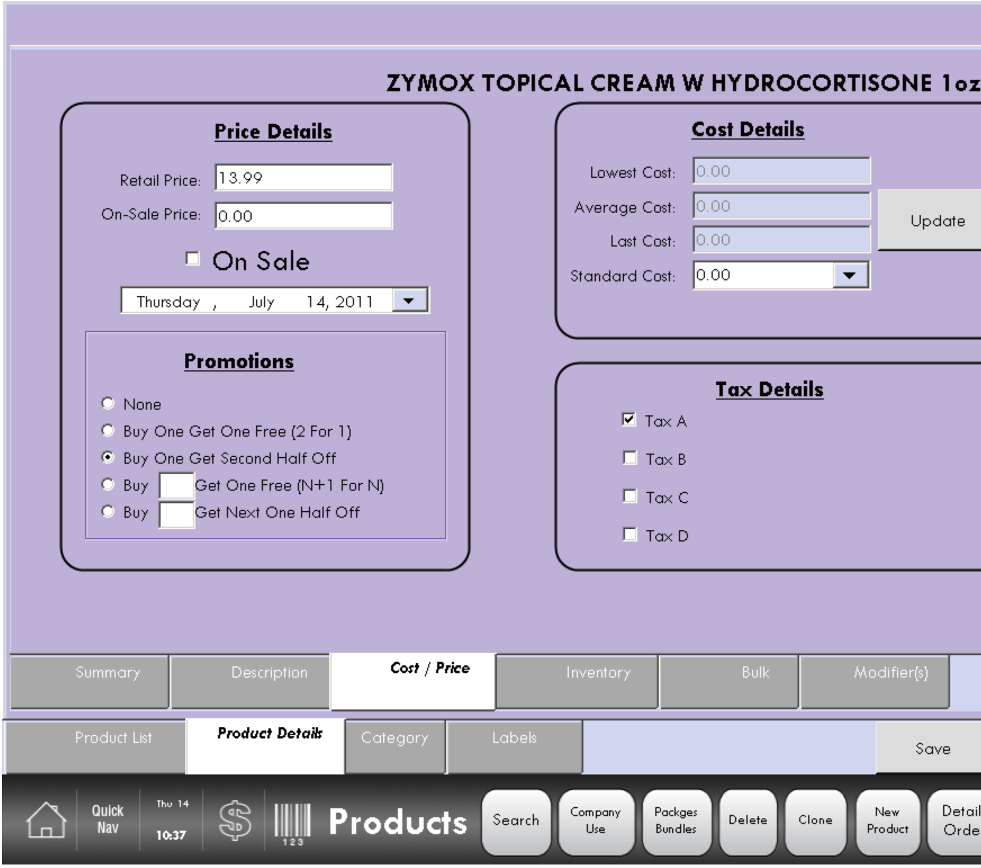
The following promotions have been added into the Product Details. Whichever one you select, will be automatically applied at checkout:

- Buy One Get One Free (2 for 1)
- Buy One Get Second Half Off
- Buy N Get One Free (N can be any number you choose – N+1 for N)

- Buy N Get Next One Half Off (N can be any number you choose)

To setup an automatic promotion:

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Details’ tab at page bottom.
4. Touch the ‘Cost/Price’ sub-tab.
5. Tap on the promotion you want to apply. Set the number for N if you choose one of the last two promotions.
6. Touch ‘Save’ when finished.



ZYMOX TOPICAL CREAM W HYDROCORTISONE 1oz

Price Details

Retail Price: 13.99

On-Sale Price: 0.00

☐ On Sale

Thursday , July 14, 2011

Promotions

○ None
○ Buy One Get One Free (2 For 1)
● Buy One Get Second Half Off
○ Buy ☐ Get One Free (N+1 For N)
○ Buy ☐ Get Next One Half Off

Cost Details

Lowest Cost: 0.00

Average Cost: 0.00

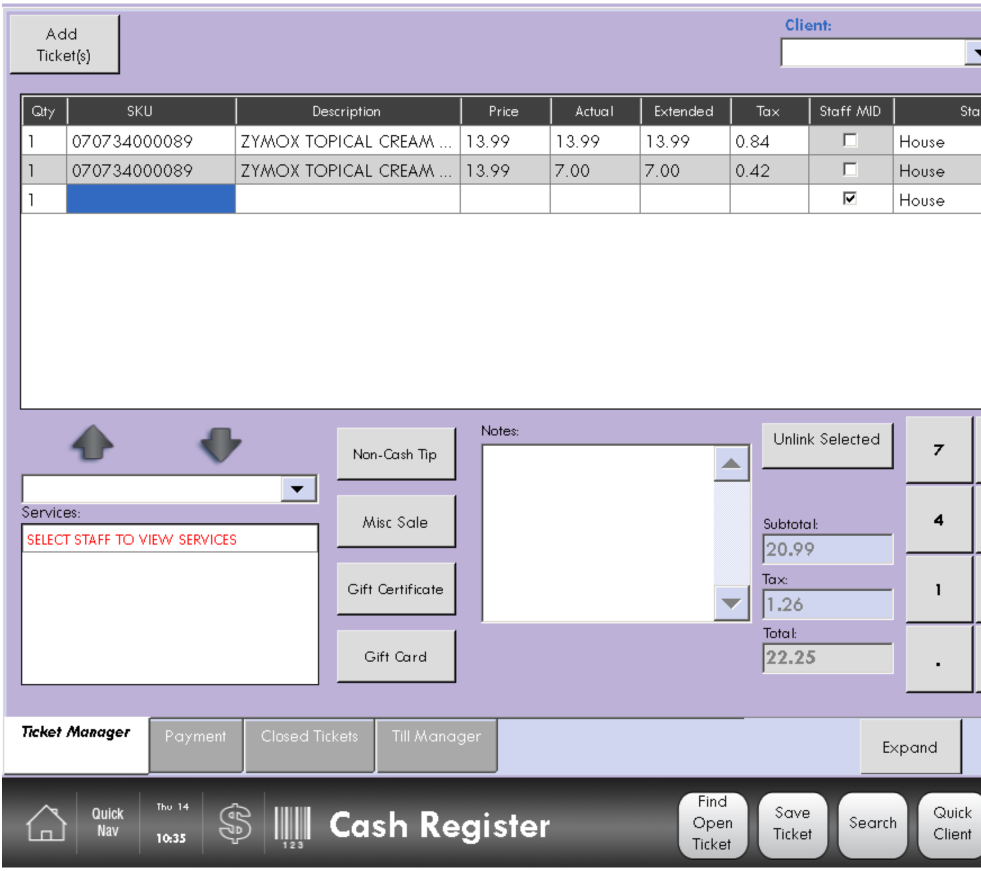
Last Cost: 0.00

Standard Cost: 0.00

Tax Details

☑ Tax A
☐ Tax B
☐ Tax C
☐ Tax D

In the cash register, as you scan the products into the SKU field, the additional product will display the promotion price. In this example we chose ‘Buy One Get Second Half Off’.



Qty	SKU	Description	Price	Actual	Extended	Tax	Staff MID	Sta
1	070734000089	ZYMOX TOPICAL CREAM ...	13.99	13.99	13.99	0.84	☐	House
1	070734000089	ZYMOX TOPICAL CREAM ...	13.99	7.00	7.00	0.42	☐	House
1							☑	House

SELECT STAFF TO VIEW SERVICES

Subtotal: 20.99

Tax: 1.26

Total: 22.25

Product Cost Averaging

To set the PO Cost for a product:

Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Cost/Price’ tab at page bottom.
4. Enter an amount in the Standard Cost text box
5. Touch ‘Save’ on the NavBar.

6. Touch the ‘Update’ Button at right of screen to update/calculate Lowest, Average, and Last costs.
7. Touch ‘Save’ on the NavBar.

Bulk Manager

Manage partial stock from larger containers (i.e., products inside boxes, boxes inside cartons, cartons inside cases, etc.) The Bulk Manager allows you to link items as ‘parent’ and ‘child’ of each other for better inventory control.

To assign a parent or child to any product:

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (e.g., ‘Carton of Moisture Shampoo’).
3. Touch ‘Details’ tab at page bottom..
4. Tap the ‘Bulk’ sub-tab at page bottom.
5. a. Touch ‘Add Parent’ at left to assign a parent for this product (e.g., ‘Case of Moisture Shampoo’).
    b. Touch ‘Add Child’ at right to assign a child for this product (e.g., ‘Bottle of Moisture Shampoo’).
6. Touch ‘Save Bulk Manager Info’ when finished.

> NOTE: Please review the Bulk Manager article for an example. The article can be found in the knowledgebase at TouchSuite.com.

Easy PO Builder

You can also create new purchase orders using the Easy PO Builder. Please refer to the instructions for ‘Easy PO Builder’ in the ‘Vendors’ section.

Remove Company-Use Product from Inventory

To track and remove a shop-use product from inventory:

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Company Use’ button on the NavBar.
4. Select a staff member associated with its use.
5. Enter a quantity of items used.
6. Add any notes related to its use that you’d like to track.
7. Touch ‘Remove’.

Delete Product

To delete existing product(s):

1. Touch ‘Products’ on the home screen.
2. Use the scroll bar if necessary to find the desired product(s).
3. Check [√] the box to the right of each product you would like to delete.
4. Touch ‘Delete’.
5. Press ‘OK’ when prompted by the system.

NOTE: To select ALL products for deleting, simply touch the ‘ALL’ column header at the top-right of page. (All products will be checked automatically). Don’t forget to uncheck any products you would like to keep before touching delete.

Sort Products

You can easily sort your product list by any of the column headers on the page (e.g. product category, price, etc.) To sort your list:

1. Touch ‘Products’ on the home screen.
2. Tap a column title (e.g. product category) at the top of the page.
3. Tap the same column title to return to the original format.

Additionally, you can filter your products using the Show: Checkboxes at the bottom of the list page. Show only Company products, only Retail products or All. All is the default.

Packages & Bundles

To create, sell, and track grouped products and/or services, please refer to the ‘Packages & Bundles’ instructions in the ‘Services’ section.

Print Product List

You can print your product list right from the Products List page.

1. Touch ‘Products’ on the home screen.
2. Sort the list any way you like using the instructions within this chapter.
3. Touch ‘Print’ on the bottom right-hand area of the page.

Add to Your Inventory

To add additional quantity to your inventory:

1. Touch ‘Products’ on the home screen.
2. Touch the desired product row (use scroll bar if necessary).
3. Touch the ‘Inventory’ tab at page bottom.
4. Touch the ‘Add to Inventory’ text box
5. Type a quantity using the keyboard.

6. Touch 'Save' when finished.

NOTE: ADD TO INVENTORY vs. ON HAND NOW
Add to Inventory refers to the quantity of items you just received from your vendor that you will now add to the database.
On Hand Now is automatically generated based on data TouchSuite already knows.

NOTE: Inventory can also be added when you use the Receiving Manager. Please refer to the instructions for 'Receiving Manager' in Chapter 10: Vendors' section.

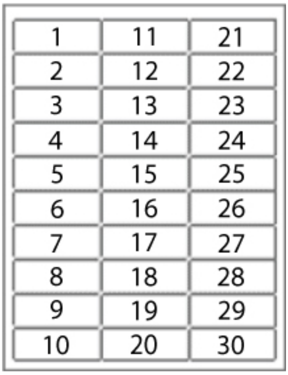
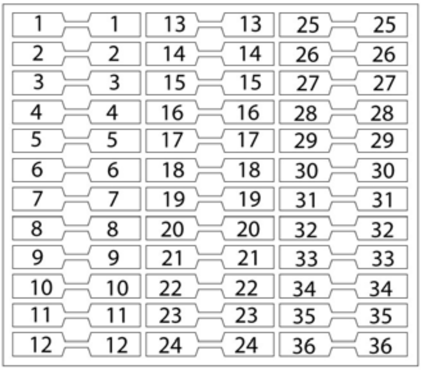
Print Labels & Barcodes

To print *product labels* (price/description), *barcode labels* (SKU numbers for scanning) or *barbell labels* (fold-over labels for smaller items):

1. Touch 'Products' on the home screen.
2. Touch any product on the list (use scroll bar if necessary).
3. Touch the 'Labels' tab at page bottom.
4. a. Highlight the product(s) in the left-hand window that you want to print by tapping them (note: touch again to un-highlight).
   -or-
   b. Touch 'Product Search' and begin to type the brand or product name in the search field. Highlight as many products on this new list as you like, and touch 'Use' on the pop-up.
5. Choose label type using the drop-down: Label, Barcode, or Barbell.
6. If you are printing a single product label, you can fill in a manual price in the Manual Price text box.

7. Choose a starting position on your label paper for the labels to print (see illustration).
8. Type the quantity of printouts you want for each product/barcode label. (NOTE: You can have TouchSuite print exactly the number of labels that mach your inventory count for each selected product. Simply select the 'Print for Quantity in Inventory' checkbox).
9. Touch 'Print'.

Start Positions:

Product/Barcode Labels	Barbell Labels
	

7 Book

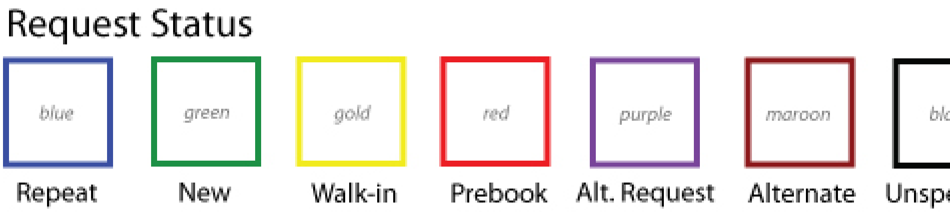
Book is designed for super-fast appointment management. On the home screen, the 'Book' button is located at the center.

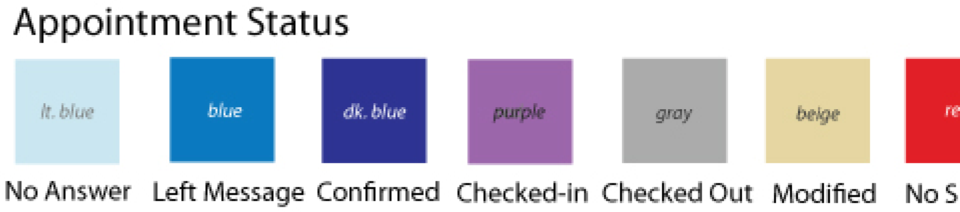
When you press Book on the home screen you go to the *Month View*, which shows you the current month. Simply tap a date to go to that day's schedule. Or navigate through other months using the '+/-' buttons on the NavBar.

Touch an open time block to bring up the Appointment Builder. (See instructions on the following pages for Setting Appointments).

If you touch a booked appointment, the Appointment Manager will appear. Here, you can view booking notes, confirm, check-in, check-out, move/modify or cancel this appointment at any time. (See instructions on the following pages).

All appointments are color-coded to let you know at a glance what the booking status is:





Make Appointment

Book Appointment

The most common way to make an appointment is through the Book. But you may also make appointments directly from a client page or a staff page. (See Chapters 4 and 5).

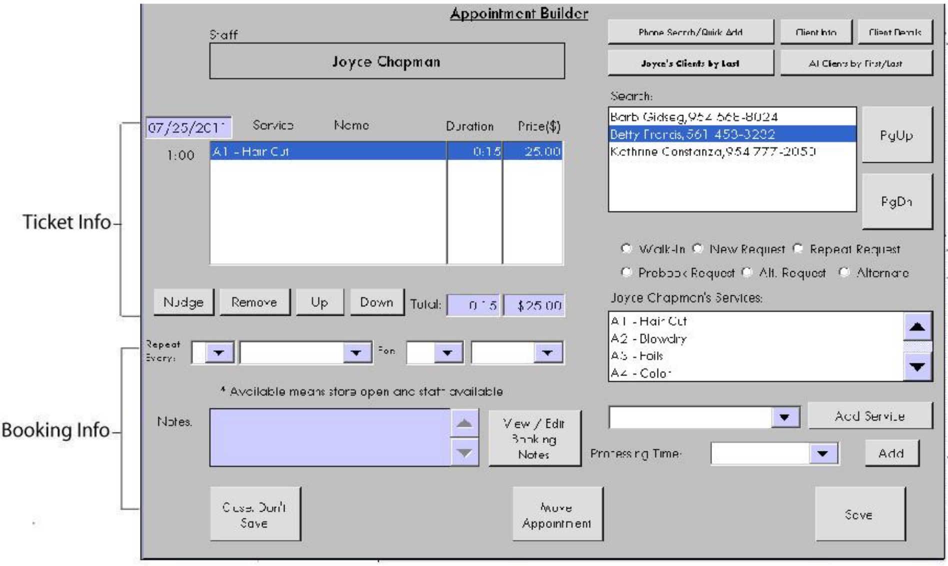
To schedule an appointment in the Book:

1. Touch ‘Book’ on the home screen.
2. If needed, navigate to other months by tapping the ‘+ / –‘ buttons on the NavBar.
3. Touch the desired appointment day. (Use the scroll bars if necessary to move the page up/down, left/right, or simply use a ‘finger-swipe’ swipe gesture anywhere on the page to move it around).
4. Touch the desired appointment time block. (The Appointment Builder appears).
5. Select a client from the client list.
   (You’ll notice this is a staff-specific list. To see the list of all clients, just tap the button called ‘All Clients’. Tap this button again to sort by first name or

last name. YOU CAN START TYPING THE CLIENT NAME ON THE KEYBOARD TO NARROW YOUR SEARCH. Press ‘Page Up or Page Down to scroll through the list. If this is a new client, press QuickAdd to quickly add them to your database without leaving the book).

6. Touch the desired service(s).
7. Touch ‘Save’ when finished.

NOTE: To *remove* a service from an appointment, just tap the unwanted service in the *Ticket Info Window* and touch *Remove.*



Staff: Joyce Chapman

07/25/2011

	Service	Name	Duration	Price($)
1:00	A1 - Hair Cut		0:15	25.00

Total: 0:15 $25.00

* Available means store open and staff available

Notes:

Search:

Barb Gidseg, 954 566-8024
Betty Francis, 561 453-3232
Kathrine Constanza, 954 777-2053

○ Walk-In ○ New Request ○ Repeat Request
○ Probook Request ○ Alt. Request ○ Alternate

Joyce Chapman's Services:

A1 - Hair Cut
A2 - Blowdry
A3 - Foils
A4 - Color

Processing Time:

Search for Client Name

While booking an appointment, you search for a client name by typing the client’s last name or first name (depending on whether you have selected ‘Client by Last Name’ or ‘Clients by First Name’).

To search for client name by typing:

1. Start to book a new appointment as usual.
2. Select a client list at top right ‘…By Last Name’ or ‘…By First Name’.
2. Touch any client name in the list box.
3. Now start typing the name you’re looking for.
   (the letters you type will appear just above the list box).

Phone Search for Client

You can easily look up a client by phone number from the Appointment Builder.

To search for client by phone number:

1. Touch an open time block in the Book. (The Appointment Builder appears).
2. Touch ‘Phone Search/ Quick Add’ on the Appointment Builder
3. Type the desired phone number. (The client with this phone number will be displayed on screen).
4. Touch ‘Use’ to select this client and start booking them for an appointment.

Quick Add Client

You can easily add a new client into the database while booking their first appointment.

To add this new client:

1. Touch the open time block in the Book that you wish to book your appointment for. (The Appointment Builder appears).
2. Touch 'Phone Search/ Quick Add' on the Appointment Builder.
3. Type the new client name and phone number.
4. Press 'Save'.

Check Client Details

You can check a client's details while making an appointment.

To check a client history while still in the book:

1. Touch an open time block in the Book. (The Appointment Builder appears).
2. Select a Client from the Client List.
3. Touch 'Client Details' at the top right of Appointment Builder.

NOTE: You will be brought to the actual details tab of the client. To get back to the appointment book, press the 'Today' button on the NavBar.

Check Client History

You can check a client's history while making an appointment (without leaving the book).

To check a client history while still in the book:

1. Touch an open time block in the Book. (The Appointment Builder appears).
2. Select a Client from the Client List.
3. Touch 'Client Info' at the top right of Appointment Builder.
4. Press 'Close' when finished.

'Book Again' Function

You have the option to ‘Book Again’ from the client info pop-up in the Book.

To use ‘Book Again’:

1. Start a new appointment as usual.
2. Select the desired client name.
3. Touch the ‘Client Info’ button
4. Highlight the previous appointment you wish to use.
5. Touch ‘Book Again’ on the pop-up. (The Appointment Builder auto-fills).
6. Edit the appointment as desired.
7. Touch ‘Save’.

Add Processing Time

You can add a ‘processing time’ between services using the Appointment Builder (e.g. deep conditioner, leave on formula for 30 minutes). The book will create an open space on the schedule so that other clients can be squeezed in during that time.

To set a processing time:

1. Follow steps 1 thru 6 for ‘Book Appt’ on previous page.
2. Select the desired processing time from the drop-down list called ‘Processing Time’.
3. Touch ‘Add’.
4. Touch the next desired service.
5. You can edit the order of your chosen services by touching one of them in the Ticket Info Window and pressing the *Up, Down* or *Remove* buttons.
6. Touch ‘Save’ when finished.

> HELPFUL TIP: You can always get back to today’s schedule by tapping the time & date ‘Today’ button on the NavBar.

Nudge Appointment

You can edit service duration and price on-the-fly using ‘Nudge’.

To nudge an appointment:

1. Follow steps 1 thru 6 for ‘Book Appt’ on previous page.
2. On the Appointment Builder, at the top left ‘Ticket Info’ window, touch the service you wish to modify.
3. Touch ‘Nudge’. (a pop-up will appear).
4. Edit the service time and price as desired.
5. Touch ‘Save’ on the pop-up.
6. Touch ‘Save’ on the Appointment Builder.

Create Standing Appointment

You can create a standing appointment (i.e. one that repeats on a regular schedule) for any client.

To set a standing appointment:

1. Follow steps 1 thru 6 for ‘Book Appt’ on previous page.
2. On the Appointment Builder, select a frequency for this appointment to repeat (e.g., repeat every 4 weeks for 1 year, etc).
3. Touch ‘Save’ when finished.
   (A confirmation pop-up will appear with all booked appointments in the series).
4. Touch ‘Print’ or ‘Cancel’ on confirmation pop-up.

Add Booking Notes

To add booking notes while making an appointment:

1. Follow steps 1 thru 6 for ‘Book Appt’ on previous page.
2. On the Appointment Builder, tap the ‘View/Edit Booking Notes’ button. Type your notes in the ‘Notes’ text box.
3. Touch ‘Save’ when finished.
4. Touch ‘Cancel’ to close the popup.

Note: You can add/edit booking notes on the Appointment Manager as well.

Edit Appointment Data

Change Service

To edit a scheduled service in the Book:

1. Touch the scheduled appointment you wish to edit in the book.
2. Touch ‘Modify Booking’ on the Appointment Manager pop-up.
3. Remove an unwanted service by tapping it in the Ticket Info Window, then touch ‘Remove’.
4. Select a new service by tapping it.
5. Touch ‘Save’ when finished

Change Client

To edit a scheduled client in the Book:

1. Touch the scheduled appointment you wish to edit in the book.
2. Touch ‘Modify Booking’ on the Appointment Builder pop-up
3. Select a different client from the drop down menu

4. Touch ‘Save’ when finished.

Confirm Appointment

To confirm an existing appointment:

1. Touch the scheduled appointment you wish to confirm in the book.
2. Touch a Confirm Type: *Left Message, No Answer, etc.*
3. Touch ‘Save Confirm’ on the Appointment Manager.

View Booking Info

To view the booking info for any scheduled appointment:

1. Touch the scheduled appointment you wish to review in the book.
2. Booking info (including time, date, staff, last modified, etc) appears at top of Appointment Manager.
3. Touch ‘Close Don’t Save’ when finished.

Edit Booking Notes

To add or edit booking notes for a scheduled appointment:

1. Touch the scheduled appointment you wish to edit
2. On the Appointment Manager, tap the ‘View/Edit Booking Notes’ button. Type your notes in the ‘Notes’ text box (or edit an existing note).
3. Touch ‘Save’ when finished.
4. Touch ‘Cancel’ to close the popup.
5. Touch ‘Close Don’t Save’ to exit the Appointment Manager.

Check-in Client

To check-in a client:

1. Touch the scheduled appointment for check-in.
2. Touch ‘Print Check-in Ticket’ If you’d like to print an itinerary for this client to present to the staff.
3. Touch ‘Check-in’.

> NOTE: You can also set ‘Print Client Check-in Ticket’ to occur automatically. See Chapter 13 ‘Back Office/Preferences’ for instructions.

Check-out Scheduled Client

To check-out a scheduled client:

1. Touch the scheduled appointment for check-out.
2. Touch ‘Check-out’ on the Appointment Manager.
3. Follow instructions for taking payment in Chapter 8 ‘Cash Register’.

Unlink Appointments at Checkout

When checking out a client with linked appointments, you can choose to ‘unlink’ them and simply charge for one or more bookings at a time.

To do this from the Book:

1. Touch the Appointment in the Book you wish to checkout.
2. Touch ‘Checkout’ on the Appointment Manager.
   (The Linked Appointment Pop-up will appear).

3. On the pop-up, highlight the appointment(s) you wish to checkout at this time.
4. Touch the 'Selected' button to choose the highlighted appointment(s) or touch the 'All' button to choose all appointments on the list.
   (You will land in the Ticket Manager with your selected appointments ready for checkout).
5. Now edit the ticket and take payment as usual. Follow instructions for taking payment in Chapter 8 'Cash Register'.

Move Appointment

To move an existing appointment to a new time, date or staff:

1. Touch the scheduled appointment you wish to edit in the book.
2. Touch 'Modify Booking' on the Appointment Manager.
3. If you simply want to nudge the appointment by :15 min or so, select the new start time in the Ticket Info Window.
4. For all other moves, touch 'Move Appointment'.
5. If you're moving to a different day, navigate to the day you really want by tapping the '+ / -' buttons on the NavBar.
6. Touch the desired new time block
   (The appointment builder re-appears with the information you're moving).
7. Touch 'Save' when finished.

NOTE: You will get an alert message if you move an appointment to a staff member that is not set up to perform the specific service(s). Simply follow the prompts on screen to continue.

Cancel Move / Restore Appointment

You can restore an original appointment you started to move by pressing the 'Move Appt?' button on the NavBar. This is helpful if you forgot what you were trying to do or, perhaps, if you change your mind halfway through the move. The original appointment will be restored intact. You can then start over. Or press 'Close, Don't Save'.

Double-Book

You can double-book a staff schedule with TouchSuite. This is especially helpful if you know the staff will be available between 'processing' times or similar situations.

To double-book in a timeslot:

1. Touch the scheduled appointment where you want to double-book another appointment.
2. Touch 'Double Book' on the Appointment Manager.
3. Select a start time in the Ticket Info Window, since the new appointment may not start at exactly the same time as the other booking.
4. Now select a client from the Client List.
5. Select one or more services from the Service List.
6. Touch 'Save' when finished.
   (The appointments will be displayed in half/split size to show that they are booked during the same timeframe).

Modify a Standing Appointment Series

To modify a standing appointment series:

1. Touch the scheduled appointment you wish to modify in the book. (The Appointment Manager pop-up appears).
2. Touch 'Modify Series' on the pop-up.
3. Edit the booking as desired on the Appointment Builder.

4. Touch ‘Save’ when finished.

Cancel Appointment

To cancel an appointment:

1. Touch the scheduled appointment you wish to cancel in the book.
2. Touch ‘Cancel’ on the Appointment Manager pop-up.
3. Touch ‘OK’ when prompted by the system.

Cancel a Standing Appointment Series

To cancel a standing appointment series:

1. Touch the scheduled appointment you wish to cancel in the book. (The appointment manager pop-up appears).
2. Touch ‘Cancel Series’ on the pop-up.
3. Touch ‘Yes’ when prompted by the system.

Print Daily Sheets

You can print daily sheets each morning (or at any time) for all staff with scheduled appointments.

To print daily sheets:

1. Touch the ‘Today’ button on the NavBar.
2. If needed, navigate to other days by tapping the ‘+ / - ‘buttons.
3. Touch ‘Print Dailys’ on the NavBar.
4. Daily Sheets will print from the receipt printer one staff at a time. (or they will print from the laser printer instead if you have selected that preference in the Back Office).

NOTE: You can print a daily sheet for just one staff member by following the instructions in Chapter 4: ‘Staff’ / Print Daily Sheet.

Text Dailys

You can send a staff member's appointment schedule directly to their cell phone. (TouchSuite SMS account required).

To text daily sheet info to staff members:

1. Touch the ‘Today’ button on the NavBar.
2. If needed, navigate to other days by tapping the ‘+ / – ‘buttons.
3. Touch 'Text Dailys' on the NavBar.
   (Text messages will be sent instantly to all staff members that have enabled this feature in their Preferences).

View Staff Week

You can easily view appointments for one staff for one week.

To view a staff’s week:

3. Touch the ‘Today’ button on the NavBar.
4. If needed, navigate to other days by tapping the ‘+ / – ‘buttons.
5. Touch the Staff’s name at the top of the screen.
6. The staff’s schedule for the current week is displayed.
7. If needed, navigate to other weeks by tapping the ‘+ / – ‘buttons.

View Openings

You can see an openings chart of appointments for all staff on one screen for a selected week. This may be especially helpful for an owner/manager who wants to get a quick feel for how busy the upcoming week will be. The black bars represent booked appointments. The white spaces represent current openings.

Current Week Chart

To view the openings chart for the current week:

1. Touch the ‘Today’ button or the ‘Book’ button on the home screen.
2. Touch the ‘Week’ button on the NavBar.
3. The opening’s chart for the current week is displayed.
4. If needed, navigate to other weeks by tapping the ‘+ / –‘ buttons.

Future Week Chart

To view the openings chart for a week in the future:

1. Touch ‘Book’ on the home screen.
2. Touch the ‘Find Openings Mode’ button on the NavBar.
3. Select the first day of the week you’d like to see using the month view. (If needed, navigate to other months by tapping the ‘+ / –‘ buttons).
4. The opening’s chart for the selected week is displayed.
5. If needed, navigate to other weeks by tapping the ‘+ / –‘ buttons.

NOTE: You can view the details of an appointment by tapping on the black bar in week view.

Flexpedia™ Appointment Search

You can easily book clients for multiple services using one or more technicians on the same day by using the *Flexpedia* feature. This can help you find the best possible itinerary for a client that gets them in and out of the salon with minimal wait time between services. The page layout on Flexpedia is organized by Step 1, Step 2, etc, to help you through the process.

To conduct a *Flexpedia* appointment search and book the desired itinerary:

1. Touch ‘Book’ on the home screen.
2. Touch ‘Flexpedia’ on the NavBar.
3. Select a date from the drop-down list at the top of the page.
4. Select a service on the 1st Appointment row from the service drop-down list (keeping in mind the order in which the client wants the services performed).
5. Select a specific staff or choose ‘All’ to show all available staff.
6. Touch ‘Find Openings’.
7. Select the desired appointment time block from the list of openings that appears at the bottom of the screen.
8. Press ‘Add To Itinerary’.
9. Now select a service on the 2nd Appointment row. (And repeat the same steps to complete your itinerary).
10. Press ‘Book Itinerary’ when finished.

NOTE: Multiple appointments for a single client are automatically linked in the system to make check-in and check-out easier. You'll never forget to charge for a service, since the client ticket will reflect all services rendered.

Visual Flexpedia™

Visual Flexpedia allows you to filter the book to show the appointment day view for selected staff.

To use *Visual Flexpedia*:

1. Go to the desired appointment day as usual.
2. Touch 'Visual Flexpedia' on the NavBar.
3. Select either:
    a. Staff type(s) in the left-hand list box; or
    b. Staff name(s) in the center list box
4. Touch a client name, if desired, in the right-hand list box. (Use 'Phone Search/Quick Add' to search for or add a client. Touch 'All Client by First/Last' to sort the client list).
5. Touch 'Filter'. (Book appointments as usual. To clear the filtered book, simply touch 'Clear Visual Flexpedia' on the NavBar).

MobileBook™ (add on service)*

Check your booked appointments remotely from any device with internet access (e.g. cell phone, laptop). To sign up for TouchSuite® MobileBook™ request the easy Add-On Services Form.

To use MobileBook™:

1. Visit www.touchsuite.com/mobile using any device with internet access.

2. Enter your Company ID and Passcode.
3. Select a date from the calendar.
4. View booked appointments.

*subscription required

TouchSuite® MobileBook™

Welcome Name!

« September 2010 »

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

9/20/2010 2:00:00 PM
Colin Roughley
Massage 1 hour

8

Cash Register

The Cash Register is where all your sales transactions take place. It's also the place to make price, product and service adjustments to a client's ticket, among other helpful features. The touch screen and attached credit card swiper help make the most of your Cash Register so that you can close out client tickets simply and efficiently.

The most common way to get to the cash register is by tapping an appointment in the Book and selecting “Checkout”. The sales data from the appointment will already be filled in on the client ticket. You can then add on any products the client would like to buy or make any changes to products, services and/or pricing as needed before accepting payment.

You can also get to the cash register by tapping the “$” (register button) or the “|||||” (scan button) on the NavBar. These are especially useful for walk-in retail purchases.

Tabs at the bottom of the screen help you navigate the Cash Register: *Ticket Builder* (optional), *Ticket Manager, Payment, Closed Tickets,* and *Till Manager*.

Following is a list of common tasks related to the Cash Register:

Checkout Scheduled Client

To checkout a client:

1. Touch the ‘Today’ button on the home screen.
2. Touch the desired appt time block (use the scroll bar if necessary).
3. Select ‘Checkout’ on the Appointment Manager pop-up.
4. If desired, add products and/or change services on the Ticket Manager (see detailed instructions on the following pages).
5. Touch the ‘Payment’ tab. (see detailed instructions for taking payment on the following pages).

Checkout Walk-in

To checkout a walk-in customer:

1. Touch the ‘$’ button or the ‘IIIII’ button on the NavBar. (You’ll be taken to the Cash Register / Ticket Manager).
2. Optional: To capture this client’s name and info, Touch ‘Quick Client’ on the NavBar (Enter name and phone number and touch ‘Save’). Then, make sure this client is now selected in the Client drop-down list.
3. See detailed instructions on the following pages for editing ticket and taking payment.

Ticket Manager

The Ticket Manager is where you view and/or edit a client’s ticket before taking payment. This page offers options for applying discounts and promotions, adding/removing products and services, combining tickets, changing pricing on-the-fly and managing staff commissions, giving you flexibility and control at point-of-sale.

Client: Chavis, Dina

Qty	SKU	Description	Price	Actual	Extended	Tax	Staff	More
1		A4 - Color	45.00	45.00	45.00		Chapman, Joyce	More
1	412929751746	B2 Product	1.00	1.00	1.00	0.07	House	More
1	499999999999	Miscellaneous Item	25.00	25.00	25.00	1.63	House	More
1							House	

Chapman, Joyce

Services:

- A1 - Hair Cut
- A2 - Blowdry
- A3 - Foils
- A4 - Color
- A5 - Updo
- A6 - Perm

Subtotal: 71.00

Tax: 1.70

Total: 72.70

Edit Ticket at Checkout

Add Services

To add service(s) to a client ticket at checkout:

1. Select a staff name from the bottom-left drop-down list. (The staff's service list appears).
2. Touch a service on the list and press the [▲] up arrow just above this list. (The service is added to the ticket). (To remove a service, touch the service name on the ticket and press the [▼] down arrow).

Add Products

There are several ways to add product(s) to a client ticket at checkout:

a. Scan It

Use the barcode scanner to scan the item, the item will automatically be entered into the ticket. Note: the cursor must be in the SKU field for this to work.
(To remove this item, touch the product name on the ticket and press the [▼] down arrow).

b. Scan It

Touch the ‘IIIII’ (scan) button on the NavBar and use the barcode scanner. Press ‘Add Item’ when prompted.
(To remove this item, touch the product name on the ticket and press the [▼] down arrow).

c. Use QuickButton

Touch the desired QuickButton and item is added to the ticket. (To remove this item, touch the product/service name on the ticket and press the [▼] down arrow).

NOTE: To set up your custom Quick Buttons, please refer to the instructions in ‘Back Office/Preferences’.

d. Use Search

Touch the ‘Search’ button on the NavBar. Find your item on the list, or start typing the name in the search field. Highlight the desired item and Touch ‘Add Sale’. Touch ‘Close’ on the pop-up when finished. (To remove this item, touch the service /product name on the ticket and press the [▼] down arrow).

e. Do a Misc Sale. (product)

Touch the ‘Misc Sale’ button at lower center of page. Enter the desired price. Check or uncheck the ‘taxable’ box.

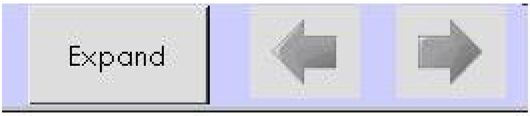
Touch 'Save' when finished. (To remove this item, touch the product name on the ticket and press the [▼] down arrow).

f. Use Visual Ticket Builder

Refer to 'Visual Ticket Builder' instructions later in this chapter for setting up and using Visual Ticket Builder.

NOTE: Rather than add the same product or service several times to a ticket, you can simply change the quantity on a line item (i.e. 2 Shampoos, 5 Nail Polish). Touch the number under the column 'Qty' and type the desired number. Then press 'Enter' on your keyboard. The barcode scanner will add a line item every time you scan the same product also.

Expand Button and Left Right Arrows (at bottom right of window)



The Expand button at the bottom of the screen is used to remove one or more items from a line item that has a QTY greater than 1. (Perhaps a customer bought 4 of something and you decide to give them a few $ off the last item. Tap the line item and expand, a new line item will display below and there you can change the actual price on the fly.)

The left and right arrows are to move the cursor on a line item, instead of using the keyboard or tapping into a field to edit.

Apply Discount

To apply a discount to a line item on the ticket:

1. Touch the ‘More’ button at the right side of the line item. (The More pop-up appears)
2. Enter an amount in the text box called ‘Discount’.
3. Select ‘%’ or ‘$’ on the ‘Disc Type’ drop-down list.
4. Touch ‘Save’ when finished with this pop-up.
5. Repeat as desired for each line item.

To apply a discount to an entire ticket:

1. Touch the ‘More’ button at the right side of any line item. (The More pop-up appears)
2. Enter an amount in the text box called ‘Discount’.
3. Select ‘%’ or ‘$’ on the ‘Disc Type’ drop-down list.
4. Check the box called ‘Apply to Entire Ticket’. (just below ‘Discount Type’)
5. Touch ‘Save’ when finished.

Apply Promotion

To apply a promo code to a line item on the ticket:

1. Touch the ‘More’ button at the right side of any line item. (The More pop-up appears).
2. Select the desired promo code (the one you created in the Marketing section of the program) from the drop-down.
3. Press ‘Save’.
4. Repeat as desired for each line item.

To apply a promo code to an entire ticket on-the-fly:

1. Touch the ‘More’ button at the right side of any line item. (The More pop-up appears).
2. Select the desired promo code (the one you created in the Marketing section of the program) from the drop-down.
3. Check the box called ‘Apply to Entire Ticket’(just below ‘Discount Type’).
4. Press ‘Save’.

NOTE: To apply a promo code already set in Marketing as a ‘Whole Ticket’ promo, simply add the code to any line item. It will automatically be applied to the entire ticket.

Change Price

To edit the ‘actual’ price for a line item on the ticket:

1. Locate the column on the ticket called ‘Actual’.
2. Type in the actual amount you wish to charge for this line item.
3. Press ‘Enter’ on your keyboard.
4. Repeat as desired for each line item.

Change Staff (for commission/payout)

To edit the ‘staff’ for a line item on the ticket:

1. Locate the column on the ticket called ‘Staff’.
2. Select a staff member from the drop-down list.
3. Repeat as desired for each line item

4. Then touch the Payment Tab at the bottom of the page and take payment as usual.

View Client Information (at Checkout)

To view client card information, including purchase history, at checkout (eg, to see the amount they paid for a service on their last visit), go to the Cash Register ‘Ticket Manager’:

1. Make sure a client name is selected from the drop-down list on the Ticket Manager.
2. Touch ‘Client Information’ at the top right of the Ticket Manager.
3. Edit client information if desired.
4. Touch ‘Save’ to save this update, or
5. Touch ‘Close’ to close the pop-up.

Combine Tickets (from the Book)

To combine separate tickets that will be paid for by one client (e.g., mother and daughter):

1. Check out the first client from the book.
2. Touch ‘Add Ticket’ on the Ticket Manager.
3. Select a date range to search for active tickets and touch ‘Get Tickets’.
4. Select a ticket from the list. (The system will ask if you’d like to load this ticket as well).
5. Answer ‘Yes’ and the tickets will be combined.
6. Make any changes you’d like.
7. Make sure the ‘Client’ name in the top-right drop-down list is the Client who is paying for this ticket.
8. Then touch the Payment Tab at the bottom of the page and take payment as usual.

NOTE: Payment will be tracked in the selected client's history.

Unlink Appointments at Checkout (linked on the Book)

To unlink appointments on the Ticket Manager:

1. Touch a Service that corresponds to the appointment the customer will not be paying at this time.
2. Touch 'Unlink Selected'.
   (The entire appointment will be removed from this ticket).
3. Now edit the ticket and take payment as usual.
   (The checkout out appt will turn 'gray' in the Book. The other appt color will remain intact).

Removing & Changing Service(s) at Checkout

When checking out a client from the Book, you can change the service(s) on the Ticket; however, the new ticket will not match the original booked appointment. If you want to make sure the changes for the client are reflected in the actual Book you have 2 options:

Option 1: FORCE CHECKOUT (make changes to the book LATER, if desired – after taking payment)

To Force Checkout on the Ticket Manager:

1. Touch the Service(s) you wish to remove.
2. Touch the [▼] arrow.
   (Some new buttons will appear on the page).
3. Edit the ticket details as desired.

4. Touch ‘Force Checkout’ at the bottom of the page.
   (You will land on the payment screen).
5. Take payment as usual.

NOTE: In the Book, your ‘Forced Checkout’ will be displayed in Beige color. You can touch this closed appointment and edit the details at any time; however, you cannot check out this appointment again. If you removed a service in Ticket Manager, go back to the book, open the appt, tap ‘Modify Appt’ and remove the same service so it matches.

Option 2: MODIFY BOOKING *(make changes to the book NOW – before taking payment).*

To Modify Booking on the Ticket Manager:

1. Touch the Service(s) you wish to remove.
2. Touch the [▼] arrow.
   (Some new buttons will appear on the page).
3. Edit the ticket details as desired.
4. Touch ‘Modify Booking’ at the bottom right of the page.
   (The appointment builder appears)
5. Edit the appointment as necessary.
6. Touch ‘Save’.
7. Now proceed to checkout again.
   (The checked out appointment will turn gray as usual).

NOTE: To stop the Modify Booking process, simply touch ‘Cancel’ at the bottom of the page.

Open Tickets

You can save and print client tickets that you plan to ring up later.

To save a ticket:

1. Use Ticket Manager as usual to edit a client ticket.
2. Touch ‘Save Ticket’ on the NavBar. The Ticket is saved in the database and you can have the system automatically print a copy for your reference. Check the preference ‘Print Open Ticket Receipt’ in the Back Office - Preferences - Printing sub-tab.

To find an open ticket:

1. Touch “$” on the NavBar.
2. Touch ‘Find Open Ticket’ on the NavBar.
3. Enter the open ticket Ref Code (printed on your ticket copy which can be scanned in with the scanner) in the ‘Ref Code’ field or simply select the ticket you want from the open ticket list, and touch ‘Use’.
4. Edit ticket as desired.
5. Check out as usual, or touch ‘Save Ticket’ to re-save and finish later.

Service Redo (split commission or change staff or client name)

Easily handle a service re-do with automatic commission splitting between staff.

To checkout a service redo:

1. Touch ‘$’ on the home screen.
2. Touch ‘Closed Tickets’ tab at page bottom.

3. Touch ‘Search’ at page top right, and enter a search term in the pop-up (ticket number, client name, date 07/ for July or 07/08 for July 8th, etc) to help you find the desired ticket. Tap on the ticket you want.
4. Touch ‘Use’ to display the ticket on screen.
5. Highlight the service name you wish to redo.
6. Touch ‘Redo’ at page center. (A new line item appears on ticket; service price is now split between staff members). (If you make a mistake, highlight the unwanted Redo Service name and touch ‘Remove Redo’ at page center).
7. Select the other staff member for the split.
8. Touch ‘Save Ticket Changes’ when finished. (Your reports will now display the new client history and staff commission information).

You can change the staff or client name and just save the ticket changes also. Changes will reflect in history and reports.

Tip Manager

Specify tips for staff on client ticket

To use the new Tip Manager feature:

1. Edit your client ticket as usual in the Cash Register / Ticket Manager.
2. If the client is paying by credit card, touch the ‘Non-Cash Tip’ button at the lower center of the page.
3. Ask your client if they'd like to leave a tip on the credit card OR, if desired, touch the ‘Tip Slip’ button on the pop-up. (Tip slip will print from the receipt printer). Hand the slip to your client and ask them to ‘Please review their ticket’. The client

will see the tip line and write in a tip. Take the tip slip and credit card from the client to process.

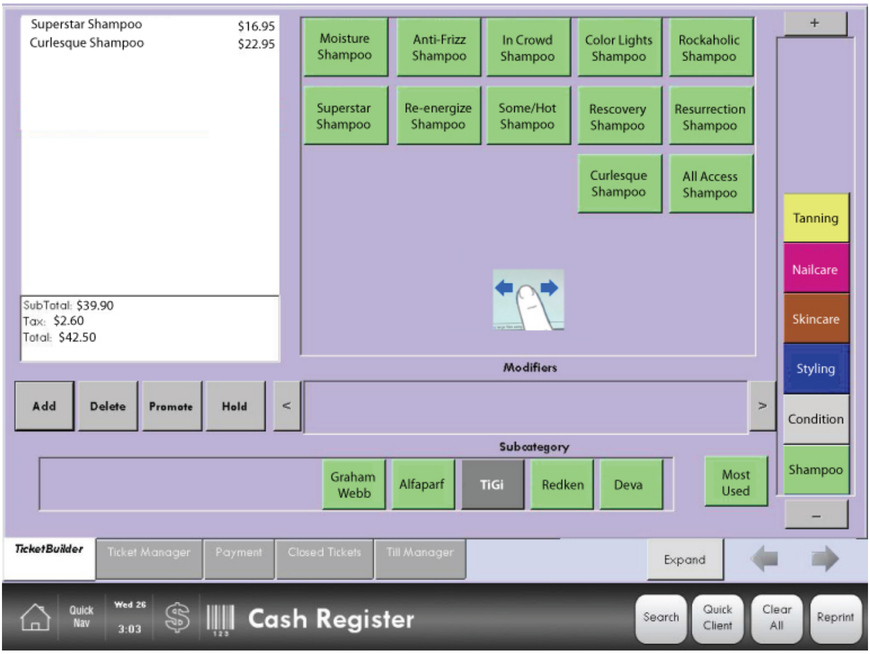
4. On the Non-Cash Tip pop-up, enter the first tip amount as written on the Tip Slip (or as communicated to you orally).
5. Touch ‘Continue’.
6. Enter next tip amount (if any for other staff) and press continue (repeat as necessary).
7. Touch ‘Finish’ to close the pop-up at any time.
8. Review the client ticket in Ticket Manager and make sure the associated staff for each tip line item is accurate or edit as necessary.
9. When the ticket is accurate, touch the ‘Payment’ tab at the bottom of the page and take payment as usual.

NOTE: You can add additional tip line items (e.g., for the assistant who wasn’t listed on the ticket). Simply touch the Non-Cash Tip button again and enter the desired tip. (Make sure the associated staff for this line item is accurate or edit as necessary).

Visual Ticket Builder

The Visual Ticket Builder is an easy way to create and edit client tickets – using quick buttons instead of drop-downs. It works like a quick-service café menu. Best of all, you get to customize the button colors, categories, etc.

Simply select a category on the right-hand side. Touch a menu item at page center. Use finger-swipe navigation (or select subcategory) to search through menu. (See instructions on setting up your product categories).



Superstar Shampoo	$16.95
Curlesque Shampoo	$22.95

SubTotal: $39.90
Tax: $2.60
Total: $42.50

Enable Visual Tickets

Please see Chapter 13: Back Office

Customize Product Categories

Please see Chapter 6: Products

Update Existing Products with Categories

Please see Chapter 6: Products

Customize Modifiers

Please see Chapter 6: Products

Use Visual Ticket Builder

To checkout a client using Visual Ticket Builder:

1. Start checkout as usual.
2. Make sure the ‘TicketBuilder’ (first tab) in the Cash Register is selected. (You need to enable Visual Ticket Builder in the Back Office Preferences System sub-tab).
3. Choose a category from the right-hand side of the page; menu items within this category appear at page center.
4. Navigate subcategories either by tapping a subcategory at bottom center of page, or simply swipe your finger at page center to move the main menu buttons and reveal even more menu items.
5. Go to the next tab ‘Ticket Manager’ to make any adjustments to price, staff, or promotions, and take payment as usual, or use QuickPay (see next section).

NOTE: You will need to customize your product categories for Visual Ticket Builder to work properly. See Chapter 6: Products.

Quick Pay

Use Quick Pay in the Visual Ticket Builder if you are ready to checkout a ticket without any further edits.

1. Touch ‘QuickPay Cash’ or ‘QuickPay Credit’ at page bottom
2. a. For QuickPay Cash, a pop up appears asking the amount of cash collected. Enter amount and press ok.
   b. For QuickPay Credit, you will be taken to the regular payment screen with the payment amount and swipe pop-up ready to go.

Accept Payment

Simple Payment

To accept one form of payment for a client ticket:

1. When client ticket is accurate, touch the ‘Payment Tab’.
2. Select a form of payment by tapping its text box (i.e., credit card, cash, etc.) (The amount due auto-fills in this box).
    a. IF CASH, make sure you also enter the actual amount of cash collected, such as a $100 bill (100.00) in the area marked ‘Cash Collected’.
    b. IF CHECK, make sure you also enter the check number in the field marked ‘Check #’.
    c. IF CREDIT CARD, use the ‘Credit Card 1’ field; don’t swipe card until prompted.
    d. IF GIFT CARD or CERTIFICATE, touch the ‘Gift Payments’ button and follow the directions for Gift Payments that appear later in this chapter.
3. Touch ‘Finish Transaction’. (Or touch ‘Finish Transaction No Receipt’ to save paper, if desired).
4. If credit card used, swipe when prompted. (NOTE: Multi-MID Stores, please see Payment Wizard instructions in the next pages).
5. If a debit only card is used, you will see the Enter Pin popup. Have the client enter their pin on the pin pad (optional item).
6. Receipt will print upon approval. (If declined, an alert message will appear).

Split Payments

To accept two forms of payment for a client ticket:

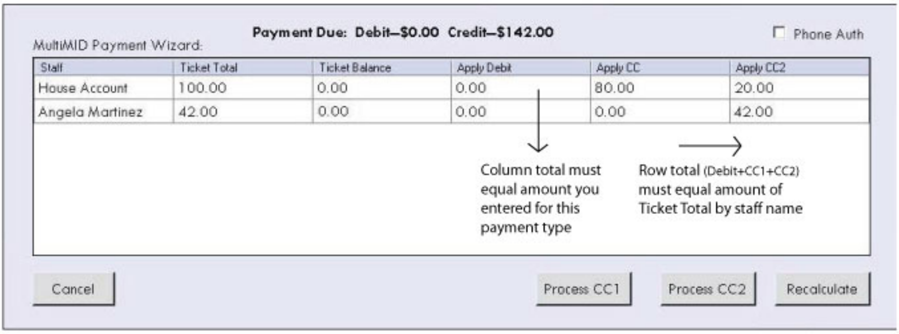
1. Edit your client ticket as usual and proceed to the Payment Screen.
2. Select the first form of payment by tapping its text box (i.e., credit card, cash, etc.) (The amount due auto-fills in this box).

3. Delete the auto-filled number and type the partial amount you want to go on the first payment type.
4. Select another form of payment by tapping its text box. (Use ‘Credit Card 2’ for a second credit card). (The remaining balance due will auto-fill in this field).
5. Touch ‘Finish Transaction’. (NOTE: Multi-MID Stores, please see Payment Wizard instructions in the next pages).
6. Any credit card(s) will be handled first. Swipe card(s) as prompted.
7. If a debit only card is used, you will see the Enter Pin popup. Have the client enter their pin on the pin pad (optional item).
8. Receipts for all transactions will print automatically afterward. If declined, an alert message will appear.

Multi-MID Payment Wizard

The Payment Wizard is a simple chart that helps you organize payments for staff with their own merchant accounts.

Simply follow regular payment instructions until the Payment Wizard appears.



Payment Due: Debit—$0.00 Credit—$142.00

Staff	Ticket Total	Ticket Balance	Apply Debit	Apply CC	Apply CC2
House Account	100.00	0.00	0.00	80.00	20.00
Angela Martinez	42.00	0.00	0.00	0.00	42.00

Column total must equal amount you entered for this payment type

Row total (Debit+CC1+CC2) must equal amount of Ticket Total by staff name

In the example above, the client wants to put $80 on one credit card, and the rest on another card.

1. Review Ticket Total by Staff Name.
2. Enter the amounts to be applied for each payment type:
    a. Each Column total must equal amount you entered for this payment type.
    b. Each Row total must equal amount of Ticket Total by staff. (NOTE: As you enter amounts, Ticket Balance adjusts itself to let you know how much money is still due on this row).
3. When Payment Wizard is accurate, touch 'Process CC1', and swipe when prompted.
4. If applicable, touch 'Process CC2', and swipe when prompted.
5. Receipts print after last transaction. (If any card is declined, the entire payment transaction is voided, and an alert message will appear).

Manual Credit Card Entry

To take a credit card payment manually:

1. Edit your client ticket as usual and then touch the Payment Tab at the bottom of the page.
2. Touch the 'Credit Card 1' text box. (The amount due will auto-fill this field).
3. Touch 'Finish Transaction'.
4. Touch 'Enter Manually' when the pop-up appears.
5. Fill out the form (You must enter at least the Name, Card #, and Expiration Date, and in some cases the CVV2 code, which is the 3-digit security code on the back of a M/C, Visa or Discover Card, or the 4-digit security code on the front of an American Express Card).
6. Press 'Process'. (Upon approval, the receipt will print out automatically. If declined, an alert message will appear).

Gift Cards

Sell Gift Card

Once you have signed up for TouchSuite Gift Card service and receive your plastic cards, you can begin selling Gift Cards to customers.

To sell a gift card using the Cash Register:

1. Touch the '$' button on the NavBar.
   (You'll be taken to the Cash Register / Ticket Manager).
2. Touch 'Gift Card' at the lower center of the screen.
3. Scan the Barcode on the back of the new card using the Barcode Scanner when prompted.
4. Enter the amount (e.g. $75.00) of the Gift Card when prompted.
5. Press 'Continue'.
6. If desired, add other purchases to this ticket on the Ticket Manager (see detailed instructions for 'Edit Ticket at Checkout').
7. Touch the 'Payment' tab and take payment as usual.

Redeem Gift / Gift Payments

To accept gift card(s)/gift certificate(s) as payment:

1. Edit client ticket as usual and touch the 'Payment' tab at the bottom of the screen.
2. Touch the 'Gift Payments' button in the payment collection area of page.
3. Tap the Gift Number field. Scan or manually type the number of the Gift Card/Certificate (available amount will auto-fill).
4. Type the desired amount to be deducted using this form of payment in the 'Payment/Use' column. (Only for gift cards.)
5. If desired, Touch 'Add Gift' at bottom of pop-up for additional gift card/ certificate payments, and repeat steps 3 and 4. (You can remove any line item by highlighting the item and touching 'Remove' at the right-side of that line item)
6. Touch 'Continue' when finished. (Total amount of gift payments will auto fill on the payment screen.
7. When payment page is accurate, touch 'Finish Transaction' and proceed as usual. (Receipts print automatically).

Gift Number	Qty.	Available	Payment/Use	Remove
100107060	1	$40.00	37.00	Remove
2346	1	$100.00	$100.00	Remove

Total Due: $137.00 **Total Payments: $ 137.00**

(In this example, the customer has a $40 Gift Card and a $100 Gift Certificate. The balance due is $137 for today's services).

Redeem Pre-Paid Package(s)

To redeem pre-paid packages stored on Gift Cards:

1. Edit client ticket as usual and touch the 'Payment' tab at the bottom of the screen.
2. Touch the 'Gift Payments' button in the payment collection area of page.
3. Scan or manually type the number of the Gift Card (available items and/or dollar value will auto-fill).
4. Type the desired amount to be deducted using this form of payment in the 'Payment/Use' column.
5. If desired, Touch 'Add Gift' at bottom of pop-up for additional gift card(s). and repeat steps 3 and 4. (You can remove any line item by highlighting the item and touching 'Remove' at the right-side of that line item)
6. Touch 'Continue' when finished. (You will go back to the payment screen with the word 'PRE-PAID' indicated, instead of a dollar value).

7. Touch ‘Finish Transaction’. (Receipts print automatically).
8. Hand Gift Card back to client for future use.

Gift Number	Qty.	Available	Payment/Use	Remove
100106987	1	$0.00	0	Remove
100106987	6	Bleach Blond	1	Remove

Total Due: $75.00 Total Payments: $ 0.00

(In this example the customer has a pre-paid package for 6 Bleach Blond treatments, and is using 1 of them today. The $0.00 in red indicates there is no cash value on the card; the card is only for pre-paid items indicated).

Check Gift Card Balance

To check a balance on a Gift Card:

1. Touch the ‘$’ button on the NavBar.
   (You’ll be taken to the Cash Register / Ticket Manager).
2. Touch the ‘Payment’ tab at the bottom of the screen.
3. Touch ‘Gift Payments’
4. Touch ‘Add Gift’

5. Scan the Barcode on the back of the Gift Card when prompted. (The balance will then appear on screen).
6. Press ‘Cancel’ to close the pop-up when finished.

NOTE: To view a list of all active gift cards and remaining balances, go to ‘Reports’ and touch the ‘Sales’ tab. Then view the report called ‘Gift Cards’.

Gift Certificates

The Gift Certificate template comes pre-loaded in your TouchSuite Software. Simply sell a certificate for any value and the Gift Certificate will automatically print from your Laser Printer.

Sell Gift Certificate

To sell a gift certificate:

1. Touch the ‘$’ button on the NavBar.
   (You’ll be taken to the Cash Register / Ticket Manager).
2. Touch ‘Gift Certificate’ at the lower center of the screen.
3. Enter the amount (e.g. $75.00) of the Gift Certificate when prompted.
4. Press ‘Continue’.
5. Touch the ‘Payment’ tab and take payment as usual.
   (The Gift Certificate will print out automatically once payment transaction has completed).

Redeem Gift Certificate

To take a Gift Certificate as payment for a client ticket, follow instructions for 'Redeem Gift / Gift Payments' earlier in this chapter.

> NOTE: If customer is only using part of the value of a Gift Certificate – you can either provide them change, or you can sell them a new certificate for the balance. Typically, you would not allow partial redemption of a gift certificate and give them change.

Reprint Gift Certificate

To reprint a gift certificate:

1. Touch the '$' button on the NavBar.
2. Touch 'Reprint' on the NavBar.
   (a pop-up appears, with a tab for Receipts and a tab for Gift Certificates).
3. Select the 'Gift Certificate' tab.
4. Highlight a Gift Certificate on the list that you'd like to reprint.
5. Touch 'Print'.

Reprint Receipt

To reprint a receipt:

1. Touch the '$' button on the NavBar.
2. Touch 'Reprint' on the NavBar.
3. (a pop-up appears, with a tab for Receipts and a tab for Gift Certificates).
4. Select the 'Receipts' tab.
5. Highlight a receipt on the list that you'd like to reprint.
6. Touch 'Print' (or touch 'Print Gift Receipt' to print this as a Gift Receipt).

Closed Tickets

You can access closed tickets to review and/or make changes (e.g. refunds/returns, change associated staff and client name).

Find Closed Ticket

To find a closed ticket:

1. Touch the '$' button on the NavBar.
2. Touch the 'Closed Tickets' tab at the bottom of the page.
3. Touch the 'Search' button at the top right of the page.
4. Enter one search phrase into the search textbox.
   (You can search for virtually any piece of information that appeared on the original ticket, including Ticket ID, Sales Date enter format "07/" for all tix in July), Client Name, Staff Name, Subtotal, Total, etc. The search window will narrow your choices as you type).
5. Now highlight the ticket you want.
6. Touch 'Use'. (The full ticket information will appear on screen).

Modify Closed Ticket

To edit a closed ticket

1. Follow steps for finding a closed ticket (above).
2. On each line item, edit staff name or client name (these are the only items you can change).
3. Touch 'Save Ticket Changes'. (Your adjustments will instantly apply to all related reports).

Refunds / Returns / Store Credit

To do a refund/return:

1. Follow steps for finding a closed ticket (above).
2. Touch the ‘Refund’ checkbox on any desired line item (or touch the ‘Refund Entire Ticket’ checkbox at bottom right).
3. For a partial refund, change the amount in each line item to the actual amount you want to refund.
4. Now, on the bottom left of the page, enter the total amount to be refunded as cash or credit in the appropriate text box. (You can use the information at the bottom center of the page as a guide, which shows how it was originally paid for).
5. For CASH REFUND, simply enter the total refund in the cash text box and press ‘Refund’. The receipt will print automatically.
   For CREDIT REFUND, enter the total refund in the CC text box and press ‘Refund’. A Refund Wizard pop-up appears. Enter the total refund again in the box called ‘Refund Amount’. Then press Process CC. Upon refund approval, the receipt will print automatically.
   For REFUND TO GIFT CARD / STORE CREDIT: enter the total amount to be refunded in the GIFT CARD text box and press ‘Refund’. (The system will ask you to scan a new gift card – this can be a card the customer already has or provide a new card). Scan the Gift Card or enter the card number manually. (Transaction will automatically complete and print receipts).

Till Manager

The Till Manager is where you tally the bills and coins in your cash drawer at the beginning and end of each shift.

Open Till

To open till at beginning of shift:

1. Touch the ‘$’ button on the NavBar.
2. Touch the ‘Till Manager’’ tab at the bottom of the page.
3. Select Today’s Date from the drop-down calendar.
4. Select the manager on duty from the Manager drop-down list.
5. Select your Start and End Times (for this shift, and this till in particular) from the corresponding drop-down lists.

NOTE: Your Till Report will only include transactions that occur during the specified till time. (e.g. if you sell something at 6:01pm but said you were closing at 6pm, your calculations will be off). It is often best to extend the Till Begin and Till End times just in case). These are taken from your business hours as the default so you may want to pad your open and close hours to reflect extended hours incase.

6. Select the Staff Member responsible for this shift using the Staff drop-down list.
7. Enter the number of bills and coins at start of shift in the text fields below ‘Quantity’. (You may use the on-screen calculator to help you count). (The total ‘Amount’ of each category will auto-fill). (You may also just enter a total amount if you do not care about keeping track of each denomination.)
8. Touch ‘Save’ when all monies are entered.

Close Till

To close till at the end of shift:

1. Touch the ‘$’ button on the NavBar.
2. Touch the ‘Till Manager’’ tab at the bottom of the page.
3. Select the Till you want to close from the Till drop-down list.
4. Touch ‘Close’ on the Till Adjustment pop up.

5. Enter the number of bills and coins remaining in the cash drawer in the text fields below ‘Quantity’. (You may use the on-screen calculator to help you count). (The total ‘Amount’ of each category will auto-fill).
6. Enter your total Credit Card receipts, Checks, etc. by category in the text fields at the right.
7. Touch ‘Close’ when all monies are entered.

NOTE: The system will alert you if the till count is not accurate. For security reasons, (i.e. prevent theft), it will not tell the staff member/receptionist the correct amount due.

Edit Till

To edit/adjust a till:

1. Touch the ‘$’ button on the NavBar.
2. Touch the ‘Till Manager’’ tab at the bottom of the page.
3. Select the Till you want to edit from the Till drop-down list.
4. Touch ‘Adjust’ on the Till Adjustment pop-up.
5. Enter the number of bills and/or coins you need to adjust in the cash drawer in the text fields below ‘Quantity’. (Use negative [-] numbers to remove money, use positive numbers to add money)
6. Touch ‘Save’ (a Notes pop-up appears).
7. Add a note if desired.
8. Touch ‘Save’ when finished.

Client Basket™

Client Basket is a ‘kiosk’ feature that allows customers to add items for checkout to their own tickets (satellite terminal required).

To enable Client Basket:

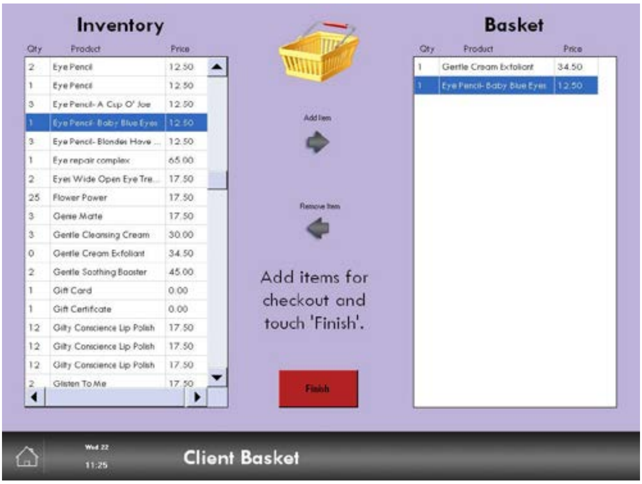
1. Touch ‘Back Office’ on the home screen.
2. Touch ‘Preferences’ on the NavBar.
3. Check ‘Enable Client Basket’.
4. Touch ‘Save’ on the NavBar

NOTE: You will have a new default sign-in screen on your satellite terminal with two buttons: ‘Client’ and ‘Staff’. *Client* takes you to a screen where the client can choose items for purchase. *Staff* takes you to the regular home screen (passcode required).

To use Client Basket:

1. Touch ‘Client’ on the satellite terminal sign-in screen.
2.
   a. For booked clients, highlight your name in the ‘Today’s Clients’ list box, and touch ‘Select’.
   b. For non-booked clients, touch the ‘Search’ button at page top right. Either type your name in the ‘Enter Name’ field or use the scroll bar to find and highlight your name on the client list, and touch ‘Select’.
3. Confirm your identity by typing the last 4 digits of your phone number on file.
4. Highlight desired item(s) for purchase at screen left and touch ‘Add’ at page center. (To remove an item from checkout, highlight item at screen right and touch ‘Remove’ at page center.
5. Touch ‘Finish’ when you are done adding item(s). (System will automatically add selections to client ticket at checkout).

Client Basket



Inventory

Qty	Product	Price
2	Eye Pencil	12.50
1	Eye Pencil	12.50
3	Eye Pencil- A Cup O' Joe	12.50
1	Eye Pencil- Baby Blue Eyes	12.50
3	Eye Pencil- Blondes Have ...	12.50
1	Eye repair complex	65.00
2	Eyes Wide Open Eye Tre...	17.50
25	Flower Power	17.50
3	Genie Matte	17.50
3	Gentle Cleansing Cream	30.00
0	Gentle Cream Exfoliant	34.50
2	Gentle Soothing Booster	45.00
1	Gift Card	0.00
1	Gift Certificate	0.00
12	Gilty Conscience Lip Polish	17.50
12	Gilty Conscience Lip Polish	17.50
12	Gilty Conscience Lip Polish	17.50
2	Glisten To Me	17.50

Add items for checkout and touch 'Finish'.

Basket

Qty	Product	Price
1	Gentle Cream Exfoliant	34.50
1	Eye Pencil- Baby Blue Eyes	12.50

9

Vendors

Vendors is designed for simple vendor management. The main view is a *Vendor List*, a summary of all vendors. Tabs at the bottom of the page help you navigate Vendors: *Vendor List, Vendor Details, PO List, PO Details,* and *Receiving Manager.*

The Vendor Details view shows you all data on a particular vendor.

Add Vendor

To add a new vendor to the database:

1. Touch ‘Vendors’ on the home screen.
2. Touch ‘New Vendor’ on the NavBar.
3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press ‘Tab’ on the keyboard to go to the next field.
   (or select a different field by tapping it).
6. Touch ‘Save’ when finished.

NOTE: *Company Name* is a mandatory field. This must be entered before you are able to save the new vendor data.

Edit Vendor

To edit an existing vendor:

1. Touch ‘Vendors’ on the home screen.
2. Touch the desired vendor row.
3. Touch the ‘Details’ tab at page bottom.
4. Tap a text field you wish to edit.
5. Type information into the field using the keyboard.
6. Press ‘Tab’ on the keyboard to go to the next field. (or select a different field by tapping it).
7. Touch ‘Save’ when finished.

Delete Vendor

To delete an existing vendor:

1. Touch ‘Vendors’ on the home screen.
2. Touch the desired vendor row.
3. Touch the ‘Details’ tab at page bottom.
4. Touch ‘Delete’.
5. Press ‘OK’ when prompted by the system.

NOTE: If you have products associated with this vendor, you will need to review those products and select a new default vendor for use in purchase orders.

Set Default Vendor

You can set any vendor as your ‘default vendor’, which can help make product data entry easier. You can change your default vendor at any time. To set your default vendor:

1. Touch ‘Vendors’ on the home screen.
2. Touch the desired Vendor row.
3. Touch the ‘Details’ tab at page bottom.
4. Touch the Default Vendor check box.
5. Touch Save.

View Purchase Orders

To view your purchase order history, including orders that are still open:

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘PO List’ tab at page bottom.
3. Touch the desired Purchase Order row.
4. Touch ‘PO Details’ tab at page bottom to review this purchase order.
5. Touch ‘PO List’ to return to the PO Summary List Page.

PO Builder

Purchase Orders are easy with the PO Builder. (If you’ve used the TouchSuite Appointment Builder feature, you’ll notice that POs work much the same way.

To create a new PO:

1. Touch ‘Vendors’ on the home screen.
2. Touch ‘New PO’ on the NavBar.
3. Select the vendor you want to order from.
    a. In the ‘Vendor’ window to the right, scroll or use the PgUp/PgDn buttons to find the vendor you want and tap to select. It will be highlighted in red.
        i. To add a new vendor use the Phone Search/Quick Add button at the top right.
        ii. To sort the vendor list use the toggle buttons above the window; ‘By Company Ascending/Descending’ or ‘By Contact Ascending/Descending’.
    b. The ‘Vendor Products’ window below will automatically populate with that vendor’s products.
4. Select the products you want to order.
    a. Tap each product in the ‘Vendor Product’ window to move it into the ‘PO’ window.

5. Adjust the quantity and cost of each product you are ordering as needed.
    a. In the ‘PO’ window, tap in the ‘Qty’ column to adjust the amount of each product you want to order and/or tap the ‘Cost’ column to adjust the cost.
    b. You can also remove any items at this point using the ‘Remove’ button below the window.
6. Touch ‘Save' at bottom right of the page.

Adding additional products to the PO that are not associated to that vendor:

1. Select additional product from the ‘All Products’ window in the center of the form.
2. You can search, scroll and filter the columns to help you find additional product. To filter the list by brand, tap on the ‘Brand’ column, then use the scroll bars to find a specific product.
3. Tap on each product you want added to the PO.
4. You will be prompted to add the product to the Vendor’s product list if there is no association. Your database will be updated to reflect the product and vendor relationship.

Manage Order

To modify, cancel, print, pay, clone, submit and receive your order; use the ‘PO Details’ tab.

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘PO List’ tab at page bottom.
3. Touch the desired Purchase Order row.

4. Touch ‘PO Details’ tab at page bottom to review this purchase order.
5. Touch ‘PO List’ to return to the PO Summary List Page.

Submit Order

Once and order has been submitted, the Status of the order will change from *Open* to *Sent* or *Emailed*, reflected in the ‘Status’ field (upper left page).

1. Submit the Purchase Order.
    a. If you prefer to fax or mail your order, check the ‘Faxed, Mailed, Submitted in Person:’ checkbox.
    b. If you prefer to email your order, press the ‘Send’ button. (The email window popup appears. The email address fills in automatically if you added it to the Vendor’s details. If not, you can manually type in an address.)
2. Press ‘Save/Finish Later’.

Modify Order

If you have not submitted your order, you can modify it at any time.

1. Press the ‘Modify’ button (bottom left page).
2. You will be in the PO Manager. Add more product, remove product and adjust pricing/quantities as needed.
3. Press ‘Save Changes’ (bottom right page).

If an order that was sent needs to be modified, you can clone (described below) the original PO, then make changes as needed to the new PO and resubmit. Void or cancel the original PO using the Void/Cancel button (bottom right).

Pay for the Order

To set the order status to *Paid*;

If you are paying from the Till, use the 'Pay From Till' button (left page). You will be prompted to select an open till, and then you will be brought to the Till Manager to make the adjustment. PO Number and amount will be automatically filled in for you. Otherwise, if you paid in some other manner, press the 'Paid' button to change the PO status to *Paid.*

Clone Order

You can use the info from a previous purchase order to create a new PO. This is especially helpful if you tend to call in the same order on a regular basis:

To clone an existing order:

1. Touch 'Vendors' on the home screen.'
2. Touch 'POs' on the NavBar.
3. Use the scroll bar if necessary to find the desired PO.
4. Touch the desired PO that you'd like to reuse.
5. Touch 'PO Details' tab.
6. Touch 'Clone' button on the left.
7. You can now adjust the products and/or quantities if desired.
8. a) Press 'Send' if you wish to send immediately via email.
   b) Press 'Print' if you'd like to fax, mail or submit in person.
   c) Press 'Save/Finish Later' to save your changes if you plan to revise or print at a later time.

Receive Ordered Products

When you receive the products you ordered, you will need to let the system know that they have arrived so that they can be added to your inventory.

One alternative way to acknowledge receipt of ordered products if you are not going to use the Receiving Manager (described below):

1. Confirm the amount of each product received in the text field ‘Rec’d’.
2. If partial quantities are delivered, just add the amount and press ‘Save/Finish Later’. See ‘Resume a Receiving Session’ below.
3. Press ‘Receive Complete’ when entire order has been delivered.

The PO status will change to *Completed* if entire order is received and *Partially Complete* if only partial quantities received.

Easy Receiving Manager

Use the easy ‘Receiving Manager’ to receive items by scanning, receive entire POs at once, and receive items you’ve never carried before. You can receive items from *existing POs* and *separate purchases* you have made using this tool.

Receive by Scanning/ Receive Entire PO at once

To quickly receive items using your barcode scanner:

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘Receiving Manager’ tab at page bottom.
3. Tap the ‘SKU’ field next to the ‘Details’ button.
4. Scan a barcode to receive product into inventory. If the product is in a PO, the system will ask if you’d like to load this PO with original quantities.

    a. Choose ‘Yes’ and the PO will load with original quantities.
    b. Choose ‘No’ and the PO will still show, but without quantities.
5. Adjust the line item(s) as necessary using the drop-downs. (If desired, touch ‘Details’ at the left of any line item to see Product Details as stored in your Products section. You can edit this page as desired).
6. Touch 'Receive Another' to receive another item and repeat steps 3 through 5.
7. Touch ‘Save’ if you want to come back and finish later.
8. Touch ‘Finish’ if you are done. ‘Finish’ will also start the printing of labels if you have set them to print.
9. PO Status will be reflected as *Completed* if 4a was done.

Receive Entire PO at once (alternative from step 4a above)

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘PO List’ tab at page bottom.
3. Select a PO you want to receive.
4. Touch the ‘Receiving Manager’ tab at page bottom. All items in the PO will be displayed with full quantities.
5. Press ‘Finish’ when done.
6. PO Status will be reflected as *Complete*d.

Receive Product(s) Never Carried Before

To quickly receive products you’ve never carried and scan them into the database:

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘Receiving Manager’ tab at page bottom.
3. Tap the ‘SKU’ field next to the ‘Details’ button.

4. Scan a new product in the SKU field. (Touch ‘Create’ to have TouchSuite auto-generate a SKU number for you).
5. Edit the line item as desired.
6. Touch 'Receive Another' to receive another item and repeat steps 3 through 5.
7. Touch ‘Save’ if you want to come back and finish later.
8. Touch ‘Finish’ if you are done. ‘Finish’ will also start the printing of labels if you have set them to print.

Resume a Receiving Session

If you used the Receiving Manager and pressed ‘Save’ instead of ‘Finish’, the session was saved for you and you can go back and finish at any time.

1. Touch ‘Vendors’ on the home screen.
2. Touch the ‘Receiving Manager’ tab at page bottom.
3. Touch the ‘Recall’ button.
4. The saved session will display and you can resume receiving products.

10

Marketing

Marketing is easy with TouchSuite. You can send automated e-mails, create message templates and targeted send lists. Future versions of TouchSuite will feature paper mailers, Internet-based messaging and other marketing services.

Tabs at the bottom of the screen help you navigate Marketing: *Automatic, Create Email Campaign, Campaign History*, *Mailing Labels,* and *Promotion Manager*.

Automated E-Mail

The automated e-mail page allows you to quickly set up standard emails that get sent automatically to your clients. Here you can 'enable' or 'disable' a standard template simply by tapping its box.

Enable Automated Email

To set-up and enable an automated email:

1. Touch 'Marketing' on the home screen.
   (You will land on the Automated Email page).
2. Locate the template that you wish to enable.
   (i.e., Birthday, Thank you or Reminder).
3. Check the box below the template name by tapping it.
4. Edit the message as desired.
5. Touch 'Save'.

NOTE: A client's email address must be input on their Client Card for automated emails to work. Automated emails are sent out overnight at approximately 1am.

Birthday emails are sent 21 days prior to birthday.
Thank You emails are sent 2 days after a checkout.
Reminder emails are sent 2 days prior to an appointment.
Same-Day Birthday emails are sent on actual birthday.

Disable Automated Email

To disable an automated email:

1. Touch 'Marketing' on the home screen.
   (You will land on the Automated Email page).
2. Locate the template that you wish to disable.
   (i.e., Birthday, Thank you or Reminder).
3. Un-check the box below the template name by tapping it.
4. Touch 'Save'.

Enable Automated SMS for Clients

You can send automated text messages (instead of automated emails) for 'Birthdays', 'Thank-yous', and 'Reminders'. (TouchSuite SMS Account required).

To enable automated SMS for clients:

1. Touch 'Marketing' on the home screen.
2. Make sure the 'Automatic' tab is selected.
3. Locate the template that you wish to enable.
   (i.e., Birthday, Thank you or Reminder).
4. Check the box below the template name by tapping it.
5. Edit each message as desired.

6. Check the box called ‘SMS’ at the top right of the screen.
7. Touch ‘Save’.

NOTE: Text messaging requires an active cell phone number and corresponding wireless company saved in each client’s information page. Their provider’s messaging rates still apply.

Disable Automated SMS for Clients

To disable automated text messages:

1. Touch ‘Marketing’ on the home screen.
2. Make sure the ‘Automatic’ tab is selected.
3. Un-check the box for ‘SMS’ at the top right of the screen.
4. Touch ‘Save’.

View Automated Outbox

To view which messages are being sent out (scheduled):

1. Touch ‘Marketing’ on the home screen.
2. Make sure the ‘Automatic’ tab is selected.
3. Tap the ‘Automated Outbox’ button.
4. Tap a header at the top of the popup that pertains to the emails you want to view (*Reminder, Thank You, Birthday*).
5. Press ‘Close’ when finished.

Create E-Mail

You can create a new e-mail message for one-time use and/or save it as a template for later use. The ‘Create Email Campaign’ page is organized in simple sections: *templates, edit message,* and *scheduling*.

To create/send an email:

1. Touch ‘Marketing’ on the home page.
2. Touch the ‘Create Email Campaign’ tab at page bottom.
3. If desired, select template on left-hand list box (subject & message will auto-fill).
4. Touch the ‘To’ button at top center page to edit recipient list.
    a. Select a ‘distribution list’ on pop-up if desired.
    b. Touch the ‘individual recipient’ checkbox to add recipients one at a time. (All clients/staff that have an email will display in the box. Choose by tapping, press ctrl to select multiple/deselect.)
    c. Press ‘Close’ when done.
5. Edit email subject and message text at center page as desired.
    a. (To save this email as a template, simply enter a template name and touch ‘Save as Template’ at left-hand side of page).
6. Set your delivery options as desired (right-side of page)
    a. Select ‘Send Now’ or ‘Send On’ (and select date).
    b. If desired select a frequency for this email campaign to repeat (the default setting is for one-time only email)
7. Touch ‘Submit’ at bottom center of page.

Picture Email Blasts

Spice up your email marketing with html picture emails. Upload your own logo, photo, and format your text.

To create a picture email:

1. Touch ‘Marketing’ on the Home Screen.
2. Touch ‘Create Email Campaign’ tab at bottom page.
3. Touch the 🖼 image icon on the toolbar at center of page.
4. Insert USB Flash Drive (containing your picture file(s)) when prompted.
5. Highlight the name(s) of your desired picture file(s) in the left hand list box, and touch ‘Use’ at screen lower right.
6. Scale your picture by touching it and adjusting the margins.
7. Add desired text using the keyboard.
8. Use the toolbar to edit font size, color, etc.
   (Note: You cannot place text on top of the picture. To do that, you’ll need to create a design using separate design software and save as a picture file, then upload to TouchSuite as a picture).
9. Send email as usual.

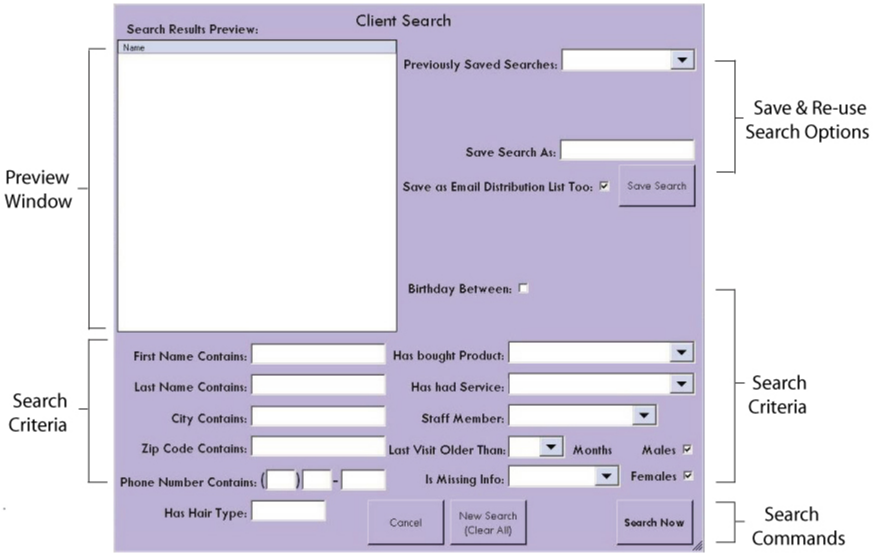
Create Distribution List

You can create and save custom distribution lists for email and texting (e.g. all women who have purchased a particular service, all clients in a selected zip code, etc). Saved distribution lists automatically update themselves to include any new clients who fit into that category. So you only have to create a custom list once and it will stay current.

To create a custom distribution list:

1. Touch ‘Marketing’ on the home screen.
2. Touch the ‘Create Email Campaign’ tab at the bottom of the screen.
3. Touch the To: button at the top of the page.
4. Touch the ‘Create Distr List’ button at the right of the page.
   (The Client Search pop-up appears).

5. Enter your criteria for this list on the lower half of the pop-up. (Use the drop-downs or type directly into a field. The resulting distribution list will only include clients who meet ALL the criteria). (Use a Previously Saved Search by selecting from the top-right drop-down).
6. Touch the ‘Search Now’ button at bottom of pop-up. (In a moment, your list will appear in the Preview window).
7. Name this List in the ‘Save Search As’ field (eg, April Birthdays, etc).
8. Press ‘Save Search’. (This list will now be available for use on the Create Email page.
9. Press ‘Cancel’ to exit the pop-up when finished.
10. Follow directions for Create Email in this chapter to create an email using your new distribution list.



Campaign History

You can view all your sent and pending emails by tapping the ‘Campaign History’ tab. Simply select a category from the list menu by tapping it – and the corresponding e-mails will be displayed.

Invalid Email Manager

TouchSuite makes it easy to handle invalid addresses when sending marketing emails.

Here’s how it works:

1. Create and submit your marketing email as usual.
2. Invalid address(es) will appear in a pop-up.
3. Either:
    a. ‘Ignore These’ (the email will be sent to everyone else); or
    b. Fix each address and touch ‘Update’ (the email is then sent to all recipients, and client cards are automatically updated).

NOTE: TouchSuite alerts you when it is ‘Sending Email’ and confirms ‘Message Sent’.

Print Mailing Labels

You can easily print mailing labels for a targeted group of clients.

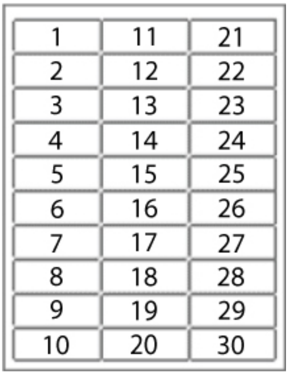
To print mailing address labels:

1. Touch ‘Marketing’ on the home screen.
2. Touch the ‘Mailing Labels’ tab at page bottom.

3. If desired, select individual clients using the List Box. (Note: Hold down the ‘Ctrl’ button on your keyboard while tapping each name).
4. Select a Mailing Type from the drop-down list.
5. Select a Date Range that relates to this mailing (e.g., birthdays from April 1 thru April 30).
6. Select a Start Position for the addresses to appear on the paper (see illustration).
7. Make sure to insert address label paper into the laser printer.
8. Touch ‘Print’.

NOTE: Mailing labels are formatted for standard 1” x 2 5/8” address label paper (e.g. Avery 5160 or generic equivalent).

Start Positions: Labels



1	11	21
2	12	22
3	13	23
4	14	24
5	15	25
6	16	26
7	17	27
8	18	28
9	19	29
10	20	30

Setup Promotions

You can add a special promotion code for a specific marketing campaign (e.g., 15% off all Revlon products during the month of May). Then, at checkout, you can simply select this code to apply the discount and, ultimately, track how successful the promotion is.

To add a promo code:

1. Touch ‘Marketing’ on the home screen.
2. Touch the ‘Promotion Manager’ tab at page bottom.
3. Type a unique 5-charater code in the ‘Promotional Code’ text box.
4. Select ‘%’ or ‘$’ from the ‘Discount Option’ drop-down list.
5. Type an amount in the ‘Discount’ text box.
6. Add a note describing the promotion in the ‘Notes’ area.
7. If desired, check the ‘Apply to Whole Ticket’ checkbox at center page.
8. Touch Save when finished.

NOTE: If you want the ability to apply a promotion both ‘per line item’ and ‘to whole ticket’, set it up as a regular promotion (not ‘whole ticket’) and instead make that choice on-the-fly at checkout. See the ‘Cash Register’ help section for applying promotions.

11 Messages

It's easy to send and receive interoffice messages with TouchSuite. Messages are displayed automatically as soon as the intended recipient(s) checks in or out with the timeclock feature. A staff member can also view and/or send messages manually by following the instructions below.

Tabs at the bottom of the screen help you navigate your Messages: *Inbox*, *Internal Messages,* and *Email*.

View Inbox Message

To view your interoffice message inbox:

1. Touch 'Messages' on the home screen.
2. Touch the header 'Inbox' tab at page bottom.
3. Select a message on the top left-hand side of the inbox by tapping it.
4. The message will appear in its entirety in the area below.

Create Outgoing Message

To create a new interoffice message:

1. Touch 'Messages' on the home screen.
2. Touch the 'Internal Messages' tab at page bottom.
3. Select a Recipient List using the drop down menu.
   (or add recipients one at a time).
4. Type a message using the keyboard.

5. Press ‘Send Message’ for recipient(s) to view on the terminal at a later time.
6. Press ‘Send as SMS’ to send as a text message to the recipient(s) mobile phone.

HELPFUL HINT: To select more than one recipient for a message, hold the ‘Ctrl’ button on your keyboard and then tap each desired recipient name. To deselect, touch the recipient name again.

Send Manual Text Message (to staff)

To send a text message to a staff member:

1. Touch ‘Messages’ on the home screen.
2. Touch the ‘Internal Messages’ tab at page bottom.
3. Highlight the desired recipients. (NOTE: Hold the ‘Ctrl’ button on your keyboard as you select each desired recipient).
4. Type a message in the ‘Outgoing Message’ text box.
5. Touch the ‘Send as SMS’ button at the bottom right-hand side of the page.

NOTE: Text messaging requires an active cell phone number and corresponding wireless company saved in each staff member’s information page. Their provider’s messaging rates still apply.

Receive Email

To receive an email:

1. Touch ‘Messages’ on the home screen.
2. Touch the ‘Email’ tab at page bottom.
3. Select an email to read from the left-hand side window. (The subject and message will be displayed on the right-hand side of the screen).

Reply Email

To reply to an email:

1. Select an email from the left-hand side window.
2. Touch the ‘Reply’ button at top left of page. (a new email form will appear for you to fill out and send).
3. Type recipient(s) in the ‘To’ field.
4. Type a message in the message field.
5. Touch ‘Send’.
6. Touch ‘OK’ upon confirmation. (Touch ‘Go To Email’ to get back to your inbox).

Forward Email

To forward an email:

1. Select an email from the left-hand side window.
2. Touch the ‘Forward’ button at top left of page. (a new email form will appear for you to fill out and send).
3. Type recipient(s) in the ‘To’ field.
4. Type a message in the message field.
5. Touch ‘Send’.
6. Touch ‘OK’ upon confirmation. (Touch ‘Go To Email’ to get back to your inbox).

Delete Email

To delete an email from your inbox:

1. Select an email from the left-hand side window. (The subject and message will be displayed on the right-hand side of the screen).
2. Touch the ‘Delete Email’ button at bottom right of page.
3. Touch ‘OK’ upon confirmation.

To select more than one email message, hold the ‘Ctrl’ button on your keyboard and then tap each desired email. To deselect, touch the recipient name again. Delete will cause all selected emails to be deleted.

Compose Email

To compose and send a new email from this section:

1. Touch ‘Messages’ on the home screen.
2. Touch the ‘Email’ tab at page bottom.
3. Touch ‘Compose’ on the top left of page.
4. Type recipient(s) in the ‘To’ field.
5. Type a subject in the ‘Subject’ field.
6. Type a message in the message field.
7. Touch ‘Send’.
8. Touch ‘OK’ upon confirmation. (Touch ‘Go To Email’ to get back to your inbox).

12 Reports

With TouchSuite, comprehensive reporting is right at your fingertips. Simply touch ‘view’ next to the report you’d like to see. You may then press ‘print’ on the NavBar. Email a report by touching ‘send’ next to the report name.

Reports are organized by department for easy navigation. Tabs at the bottom of the screen help you navigate the Reports section: *Sales, Calendar, Staff, Clients, Products/Services, Vendors & POs, Export*, *Outgoing reports* and *Finished Reports*.

Importantly, only managers with clearance can access this section.

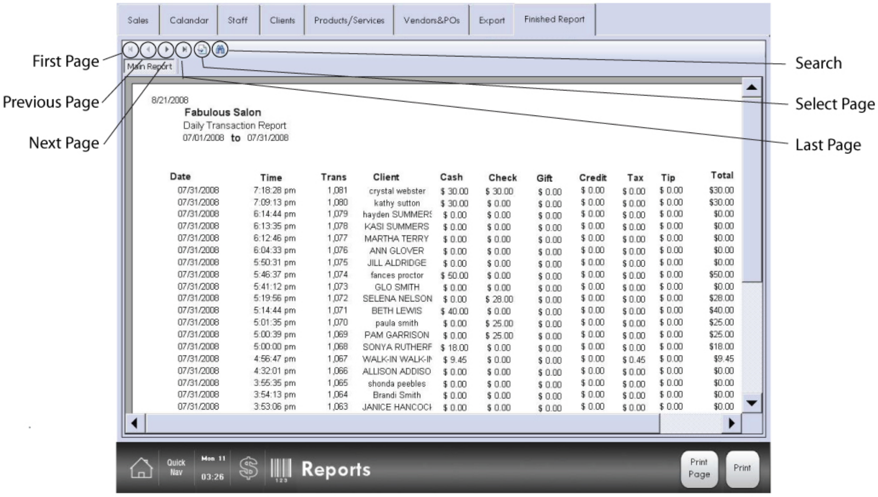
View/Print Report

To view/print a report:

1. Touch ‘Reports’ on the home screen.
2. Find your desired report (use page tabs as necessary).
3. Select a Date Range toward the top of the page to generate a report for that timeframe.
4. Touch ‘View’ next to the name of the report you’d like to see. (For some reports, you may need to first make a selection from a nearby drop-down list, such as select staff member or account to view).
5. The report will generate on screen.
6. Notice the icons on the top left of the screen.
    a. Use the arrows to navigate forward and backward through different pages.

b. Use the ‘Paper’ icon to select a specific page number.
c. Use the “Binoculars’ icon to select a specific word to search for within the report.

7. If you’d like to print this report, press print on the NavBar. Or use the Print Page button to print the current page.



8/21/2008
Fabulous Salon
Daily Transaction Report
07/01/2008 **to** 07/31/2008

Date	Time	Trans	Client	Cash	Check	Gift	Credit	Tax	Tip	Total
07/31/2008	7:18:28 pm	1,081	crystal webster	$ 30.00	$ 30.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$30.00
07/31/2008	7:09:13 pm	1,080	kathy sutton	$ 30.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$30.00
07/31/2008	6:14:44 pm	1,079	hayden SUMMERS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	6:13:35 pm	1,078	KASI SUMMERS	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	6:12:46 pm	1,077	MARTHA TERRY	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	6:04:33 pm	1,076	ANN GLOVER	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	5:50:31 pm	1,075	JILL ALDRIDGE	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	5:46:37 pm	1,074	fances proctor	$ 50.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$50.00
07/31/2008	5:41:12 pm	1,073	GLO SMITH	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	5:19:56 pm	1,072	SELENA NELSON	$ 0.00	$ 28.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$28.00
07/31/2008	5:14:44 pm	1,071	BETH LEWIS	$ 40.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$40.00
07/31/2008	5:01:35 pm	1,070	paula smith	$ 0.00	$ 25.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$25.00
07/31/2008	5:00:39 pm	1,069	PAM GARRISON	$ 0.00	$ 25.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$25.00
07/31/2008	5:00:00 pm	1,068	SONYA RUTHERF	$ 18.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$18.00
07/31/2008	4:56:47 pm	1,067	WALK-IN WALK-IN	$ 9.45	$ 0.00	$ 0.00	$ 0.00	$ 0.45	$ 0.00	$9.45
07/31/2008	4:32:01 pm	1,066	ALLISON ADDISO	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	3:55:35 pm	1,065	shonda peebles	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	3:54:13 pm	1,064	Brandi Smith	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
07/31/2008	3:53:06 pm	1,063	JANICE HANCOCK	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00

Email Report

Email a report one time or select the weekday(s) and time(s) of day that you’d like to automatically email reports on a recurring schedule. Send yourself or anyone else updated reports twice a day, at the times you choose.

To email a report one time:

1. Touch Reports on the home screen.

2. Find your desired report (use page tabs as necessary).
3. Select a desired date range at top center of page.
4. Touch ‘Send’ next to desired report name (a pop-up appears).
5. Fill out the form, To and CC.
6. Touch ‘Send Now’.

To schedule emailed reports:

1. Touch Reports on the home screen.
2. Find your desired report (use page tabs as necessary).
3. Touch ‘Send’ next to desired report name (a pop-up appears).
4. Fill out the form, To and CC.
5. Check the Daily, Weekly or Monthly radio buttons to send the report at the desired frequency.
6. Check the days the reports will be sent.
    a. For Daily you must choose which days. Choose Sunday through Saturday or any combination of days.
    b. For Weekly you must choose one day.
    c. For Monthly, choose which day of the month, the 1st or the 15th.
7. Select the send times.
8. If you prefer to see the previous day’s report – select that check box.
9. Press ‘Send Later’ to schedule.

View/Remove Recurring Email Reports

To see a list of reports sent via email:

1. Touch ‘Reports’ on the home screen.
2. Select the ‘Outgoing Reports’ tab at page bottom.

To remove or deactivate a report from the email queue:

1. Find the report you want to remove, tap the ‘Remove’ button.
2. OR to deactivate the email function temporarily, deselect the ‘Active’ checkbox by tapping the checkmark.

Export Report

To export a report:

3. Touch ‘Reports’ on the home screen.
4. Select the ‘Export’ tab at page bottom.
5. Select a Date Range toward the top of the page to generate a report for that timeframe.
6. Touch the name of the report (in the list box) you wish to export.
7. Touch the ‘Export’ button at the center of the page.
8. When prompted, insert your USB Flash Drive into either Port 1 or Port 2 (located in front of the system near the on/off button under the plastic cover).
9. Remove USB Flash Drive when prompted.

NOTE: On the USB Flash Drive, the report will appear in a folder labeled TouchSuite. The file format is Microsoft Excel.

Report Descriptions

SALES	
BATCH REPORT	Lists all approved credit card transactions during selected date range.
DAILY TRANSACTIONS	Lists all transactions incl. forms of payment, tips and summary for selected date range. Recommended for use as the End of Shift/Day Report. Choose 'Detail' or 'Summary' for report type. Choose 'By All' or 'Multichoice' for staff member(s).
REFUND TRANSACTIONS	Lists all refund transactions during selected date range.
GIFT CARDS	Lists all Gift Cards sold, incl. original values and remaining balances.
GIFT CERTIFICATES	Lists all Gift Certificates sold, incl. certificate use status.
PROJECTED SALES FROM BOOK	Lists future sales based on booked appointments for the selected date range.
SALES BY CLIENT	Lists purchased items by client during selected date range.
CLIENT SALES	Lists sales totals and payment method totals by client during selected date range
SALES BY DATE	Lists all sales by selected date range.
SALES BY STAFF	Lists sales by staff for selected date range and/or specified staff member.
RING UP	Lists the passcodes used to ring-up each sale.
SALES BY SERVICE	Lists all service sales by selected date range.

Sales by service by staff	Lists all service sales by staff member for selected date range.
Sales by Product	Lists all product sales by selected date range.
Sales by Product by Staff	Lists all product sales by staff member for selected date range and/or specified staff member.
Sales by SKU	Lists sales by SKU number, including client ticket detail, during selected date range.
Sales by Category	Lists all product sales by product category description during selected date range.
Sales by Subcategory	Lists all product sales by product subcategory description during selected date range.
Sales by Brand	Lists sales by brand name, including client ticket detail, during selected date range.
Sales by _________	Lists all product sales by selected data field. You can generate this list by Brand, Size, Color, Style, SKU, or any customized field you created when entering the original product.
Promotions	Lists promo code usage.
Tax Summary	Lists sales tax collected for each tax type as set in Back Office.
Open Tickets	Lists all saved invoices that have not been checked out.

CALENDAR

Appointments by Date	Lists all booked appointments by selected date range.
Appointments by Staff	Lists all booked appointments per staff member by selected date range.
Wait List	Lists all clients currently on a wait list, incl. phone number.

CANCELLATIONS	Lists all clients who originally booked then cancelled their appointment by selected date range.
WALK INS	Lists all walk-in clients by selected date range.
STANDING APPOINTMENTS BY STAFF	Lists standing appointments for all staff or selected staff member.
STANDING APPOINTMENTS BY CLIENTS	Lists all standing appointments by client name.
STANDING APPOINTMENTS BY CLIENTS SUMMARY	Lists appointment detail for standing appointments for all clients or by selected client.
STANDING APPOINTMENTS BY STAFF SUMMARY	Lists appointment detail for standing appointments for all staff or by selected staff.
PENDING APPOINTMENTS	Lists appointment detail for pending appointments for all staff or by selected staff.
BOOK/CALENDAR LOG	Lists all modified appointments (and displays the staff member and date of last edit, along with original booking date).

STAFF

STAFF LIST	Lists staff member contact information.
STAFF TIPS	Lists all staff member declared cash tip income (reported from Timeclock) and other tip income (reported from Cash Register) for selected date range.
STAFF SCHEDULES	Displays each staff member's schedule by date range.
TIMECLOCK	Timeclock report that lists hours worked for each staff member for selected date range.

TIMECLOCK BY STAFF SUMMARY	Timeclock report that lists clock-in/clock-out details and total hours worked for each staff member for selected date range.
STAFF SERVICES	Displays the custom service menu for each staff member, incl. price and service duration.
STAFF PAYOUT	Staff commission report that lists all products and services sold by staff (or selected staff member) for selected date range.
RENTER PAYOUT	Renter payout/commission report that lists all products and services sold by selected renter for selected date range.
AUDIT LOG	A log of all areas accessed by each staff member for selected date range.
TILL SUMMARY	A summary of cash drawer tills opened/closed by staff (or selected staff member) for selected date range.
EMPLOYEE SCHEDULE BY WEEK	Lists weekly staff schedule by selected date range.
STAFF SUMMARY	An evaluation report that shows productivity data for all staff (or selected staff member).

CLIENTS

CLIENT LIST	Lists all client contact information in the database by first name or last name.
HEARD ABOUT REPORT	Lists referral/heard about info.
MERGED CLIENTS	Lists original and updated client info for merged client cards.

PRODUCTS / SERVICES

PRODUCTS LIST	Lists all products in the database, which can be sorted by category.
PRODUCT DETAILS	Lists product detail information for each product in your database.
INVENTORY LIST	Lists inventory detail, including quantities, pricing and profit margin.
INVENTORY VALUE	Lists inventory detail, including the wholesale and retail values of items in stock.
SERVICES LIST	Lists all services in the database, which can be sorted by category, incl. price and service duration.
PROFITABILITY BY CATEGORY	Lists all products and services in terms of cost, revenue and profit to help you determine which items are most profitable for your Pro.
VENDOR PRODUCT LIST	Lists products sold by vendors (or selected vendor).
COMPANY USE BY PRODUCT	Lists items that have been removed from inventory for shop-use and indicates who removed them, sorted by product name.
COMPANY USE BY STAFF	Lists items that have been removed from inventory as shop-use and indicates who removed them, sorted by staff name

VENDORS & POs

VENDOR CONTACT LIST	Lists all vendor contact information in the database.
VENDOR PRODUCT LIST	Lists products sold by vendors (or selected vendor).
PURCHASE ORDER LIST	Lists all purchase orders, which can be sorted by category.

13 Back Office

Back Office is where you manage your software settings, user preferences and credit card processing.

Back Office settings are organized by department. Tabs at the bottom of the page help you navigate this section: *Company, System, Credit Cards, Preferences, Summary* and *Multi-Terminal*.

Importantly, only managers with security clearance can access this section.

Company

Company is where you enter your legal business information, including your address, federal ID # and tax information. Some of this information will already be filled in from the initial Setup Wizard.

To enter company data:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘Company’ tab at page bottom.
3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press ‘Tab’ on the keyboard to go to the next field (or select a different field by tapping it).
6. Touch ‘Save’ when finished.

Business Hours

The business hours are used for displaying the “Appointment Book” time slots and are also used in managing your cash drawer till. Please pad the open and close times to truly reflect your actual hours of operation. If you normally close at 6 pm but you tend to allow clients that are in your store to remain after hours to make purchases or you continually check out clients after 6 pm, make sure your ‘Close’ business hours are set for 7 pm or later.

Setting Tax Types

You can set unique tax rates for products and services. There are 4 customizable presets (Tax A, Tax B, Tax C, Tax D). You can rename these as desired.

To create or edit a Tax Type:

1. Touch ‘Back Office’ on the home screen.
2. Make sure you are on the ‘Company’ tab.
3. At bottom left, highlight a tab for Tax A, B, C or D (You can rename these tab titles [e.g., Treatment, Beverages, etc]. Simply touch the ‘Change’ button and enter your desired title. Then touch 'Save'.)
4. Enter the tax rate (NOTE: State, County, City, and Other taxes are added together for a grand total, so you might only need to enter one number in one box).
5. Touch ‘Save’ on the NavBar.

NOTE: To associate a product or service with a particular tax type, simply go to the Product Details or Service Details page and check the appropriate box.

To set a Tax Type as Default Product Tax

1. Go to the desired Tax Tab and check the box for Products Default.
2. Touch the long button ‘Reset All Products to Defaults’ to apply this change to your existing products. (You will see an alert message about this new setting).
3. Touch ‘Reset Taxes’ (or touch cancel).

To set a Tax Type as Default Service Tax

1. Go to the desired Tax Tab and check the box for Services Default.
2. Touch the long button ‘Reset All Services to Defaults’ to apply this change to your existing services. (You will see an alert message about this new setting).
3. Touch ‘Reset Taxes’ (or touch cancel).

System

This section is for email settings as well as backups, upgrades, time/date information and more. Many of the functions will not be used or will be used in support situations if needed. The email settings will enable you to send and receive email as well as send text messages. You may need to contact your broadband service provider to ensure that you enter the information correctly.

HELPFUL HINT: If you use Microsoft Outlook on another computer, you can find your proper account settings by opening Outlook and looking at the section called ‘Tools / E-Mail Accounts’.

To enter your email settings:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘System’ tab page bottom.
3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press ‘Tab’ on the keyboard to go to the next field (or select a different field by tapping it).
6. Press ‘Send Test Email’ when finished.

Backup

TouchSuite backs up your system data automatically overnight if you leave your computer on as recommended; however, you can also backup your system data manually at any time.

To back up your system data:

1. Touch ‘Back Office’ on the home screen.
2. Select the System tab at page bottom.
3. Touch the ‘Backup Database’ button.
4. The backup will begin automatically (this may take a few minutes).
5. Simply wait for the backup to complete. (It will return you to the home page).

Upgrade

You are notified onscreen when a software upgrade is available. Simply touch ‘Upgrade Now’ or ‘Remind Me Later’ on the pop-up. Upgrades are very fast (approx. 30 seconds).

To check if you have the latest upgrade, or to upgrade manually:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘System’ tab at page bottom.
3. Touch ‘Upgrade’.
4. A message pops up notifying you that the system will let you know when an upgrade is available. Press OK.
5. You can now return to your daily tasks. When the Upgrade is available, a popup will notify you to upgrade ‘Now’ or ‘Later’.
6. Tap ‘Now’ and wait for the upgrade to complete. It will return you to the home page when completed.

Set Date / Time

To change the system date & time:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘System’ tab at page bottom.
3. Touch the ‘Date/Time’ button.
4. Adjust the date and time on the pop-up. (For the time, you may need to slide your finger across the number you wish to highlight and change).
5. Touch ‘Apply’ to apply the changes.
6. Touch ‘OK’ when finished.

Open Drawer

To open the cash drawer (this method can be used to test if the cash drawer is working properly):

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘System’ tab at page bottom.
3. Touch the ‘Open Drawer’ button at the upper right-hand side of the screen.

Import Utility

The Import Data Utility allows you to import data from other programs (MS Excel and Comma Delimited File formats).

To use the Import Data Utility:

1. Touch ‘Back Office' on the NavBar.
2. Select the 'System' tab at page bottom.
3. Touch the 'Import Data' button.
4. Select a category 'Clients' or 'Products'. (The History button will display your import history summary).
5. Insert your Flash Drive containing the data you want to import.
6. Touch 'Load Data' to view the data on the Flash Drive. (Data in an incorrect format will be highlighted in red. This must be corrected prior to import. You may make corrections directly on the screen, or use another computer if you prefer – then try the import feature again).
7. Touch 'Recheck Data' to check your file for compatibility.
8. Touch 'Import' to import this data into your database.
9. Touch 'Close' when finished.
10. If desired, touch a new category for import or select 'Back to TouchSuite'.
11. Remove Flash Drive.

Staff Training Mode

Set TouchSuite to ‘Training Mode’ to practice booking, checkout, and more (great for new hires).

To enable training mode:

1. Touch ‘Back Office’ on the home screen.
2. Touch the ‘System’ tab at page bottom.

3. Touch 'Enable Training Mode' at page right.
4. Start practicing.

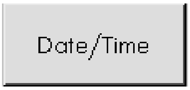
Button:	**Use For:**
Backup Database	This button will backup your database. (NOTE: Your system backs up your database automatically each night. This button lets you backup manually at any time).
Upgrade	This button will update your system to the most current software version of TouchSuite.
Verify Backup Drive	This button lets you know if your backup flash drive is connected and working properly.
Uninstall Remote Support	This button will remove the Remote Support Feature from your system. TouchSuite Customer Service will not be able to log onto your system.
Import Data	This button will import Data into the system.
Renew Internet Connection	This button will refresh the internet connection with the system.
Clear Print Queue	This button will clear all the print queues.

This button will test your internet connection and let you know if it is working properly.

This button will reopen the Startup Wizard that you initially used to setup your system.

This button sets TouchSuite to ‘Training Mode’ to practice booking, checkout, and more (great for new hires).

This button will open your cash drawer. It is often used to test that your cash drawer is functioning properly.



This button will open your Date & Time Properties so that you can reset them. (Please follow instructions on previous page).

This button will send you an email to test your settings and confirm that this feature is working properly.

Credit Cards

Credit Cards is where you enter your merchant account information for proper setup of credit card processing. Please refer to your introduction letter for more information on setting up your account. You can also call technical support for help.

Account Information

To setup your merchant account information:

1. Touch ‘Back Office’ on the home screen.
2. Select the header ‘Credit Cards’ tab at page bottom.
3. Tap a text field you wish to type into.
4. Type information into the field using the keyboard.
5. Press the ‘Tab’ button on the keyboard to go to the next field (or select a different field by tapping it).
6. Press ‘Save’ on the NavBar when finished.

Enable Multi-MIDs (for Multi-MID Locations)

To turn on *Multiple-Merchant Accounts (Multi-MIDs)* functionality:

1. Touch ‘Back Office’ on the home screen.
2. Touch the ‘Credit Cards’ tab at page bottom.
3. Touch the appropriate checkboxes under the subheading for *Multiple-MID Options*.
4. Touch ‘Save’ on the NavBar when finished.

Preferences

Preferences is where you manage your user settings for desired functionality, such as whether you’d like client phone numbers to show up on the booking screen or client list. Preferences are organized in sections (sub-tabs): *System, Display, Printing, Quick Buttons and Add Ons*.

To set preferences:

1. Touch ‘Back Office’ on the home screen.

2. Select the ‘Preferences’ tab at page bottom.
3. Select the desired sub-tab (printing, display, etc.)
4. Check [√] any box by tapping it to set that preference.
   (tap again to un-check, if desired).
5. Press ‘Save’ on the NavBar when finished.

Preference Descriptions

SYSTEM	
Print Next Appt on Receipt	Prints customer’s next appointment on their receipt.
Refund ONLY To Gift Cards	The system will no longer allow cash or credit card refunds, but instead will prompt you to put the refund amount on a gift card.
Enable QSR	Enables the ‘Quick Service’ feature – no signature required for purchases of $25 or less.
Enable Visual Ticket Builder	Enables the ‘Visual Ticket Builder’ feature. Appears as the first tab in Cash Register.
Disable ALL Access Controls	The system will stop asking for user passcodes to access program sections except for Back Office.
Enable Session login	The system will stop asking for passcodes within the cash register after the initial entry into the cash register. Once cash register is exited, passcode prompting will resume.
Open Cash Drawer for Credit only transactions	The cash drawer will pop open following a credit card sale (the same as it does for cash).

Enable 24 Hour Calendar	Displays the full 24-hours on each day of the Book (instead of displaying business hours).
Disable ONLY Check Out Access	The system will stop asking for user passcodes to access the cash register.
Disable Modification Reminder Send out	System will no longer send client an email informing them of changes to their existing appointment.
Enable Client Basket	Enable client shopping on your satellite machine.
Enable Wait List	Display the Wait List window at all times in the Book
After completion of a transaction land on Book/New Ticket	After a sale, you will either return to the Book 'today view' or stay in the Cash Register to start a new ticket.
Withholding	Designates a percentage of staff earnings to be withheld (e.g. employee training, charitable contribution, etc). Select Products or Services or both to withhold from.
Screen Display	Enter a welcome message for your Customer Facing Pole Display (optional equipment).
Costs	This sets the standard costs of your products to the designated checked item. The standard costs are used in the profitability reports.

DISPLAY

Show Phone Numbers in Appointments	Displays client phone numbers in appointment book.

Show Phone Numbers in Client List	Displays client phone numbers on client list.
Show Phone Numbers in Appointment by Staff Report	Displays client phone numbers on the ‘Appointment By Staff’ Report.
Show Phone Numbers in Print Daily	Displays client phone numbers on daily sheets.
Require Passcode for Booking and Modifying Appointments	Staff members will be required to enter their passcode to book AND to modify appointments.
Require Passcode for Modifying Appointments	Staff members will be required to enter their passcode ONLY when modifying appointments.

PRINTING

Print Second Primary Receipt	Two itemized receipts will print at checkout.
Print Second CC Receipt	Two credit card receipts will print at checkout.
Print Client Ticket at Check In	Automatically prints a client ‘traveler’ ticket to the *receipt printer* upon checking in a client.
Print Client History on Client Ticket at Check In	Adds info on last 3 visits to client ‘traveler’ ticket.

PRINT CLIENT TICKET TO REPORT PRINTER	Automatically prints a client ‘traveler’ ticket to the *report printer* upon checking in a client.
PRINT DAILYS TO REPORT PRINTER	Prints daily sheets to report printer instead of receipt printer.
PRINT COLOR FORMULAS ON DAILYS	Prints the client color formula on the Dailys.
AUTO PRINT DAILY BATCH REPORT	Automatically prints daily Batch Report info at end of day (close to midnight). NOTE: TouchSuite system must be ON for this to function properly.
PRINT CLIENT NOTES ON DAILYS	Adds client notes to daily sheets.
PRINT OPEN TICKET RECEIPT	Automatically prints an open invoice upon save.
PRINT OPEN HOURS ON DAILYS	Prints business hours on daily sheets.
RECEIPT MESSAGE (W/DATE SELECT)	The 'Receipt Message' is a time-sensitive message that prints on every customer receipt (great for promotions that have an end date).
POLICY MESSAGE	The 'Policy Message' prints on every customer receipt if checked.

Quick Buttons

You can add up to 48 custom buttons to your cash register to make checkout a breeze.

To add your custom Quick Buttons:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘Preferences’ tab at page bottom.
3. Locate the area called Quick Buttons. (You can set 6 rows of buttons – Bar A, Bar B, etc).
4. Touch ‘Quick Bar X’ button at the right side of the chart to select/change which row you are setting (A,B,C,D,E,F)
5. Touch an available blank button.
6. Use the Product/Service Search pop-up to find your desired product/service and highlight the desired item. (*To use the service popup, check the ‘Select a Service’ checkbox first.*)
7. Touch ‘Use’ on the pop-up (The Quick Button is now dedicated for that product/service. You can change the text that will show on this button by modifying the text fields directly below the button).
8. Touch ‘Save Quick Bar’ when finished.

Add-Ons

Add-Ons is where you manage your Add-On Services account information.

Customer Number

Your customer number is assigned to you by TouchSuite when you order the system. This number is required to activate any of the add-on services you wish to use. Please call TouchSuite support for help in entering this number when you subscribe to an add-on service.

Gift Card Account

Once you have signed up for the TouchSuite Gift Card service and receive your plastic cards, you can begin selling Gift Cards to customers.

To setup your gift card account information in TouchSuite:

1. Touch ‘Back Office’ on the home screen.
2. Touch the ‘Preferences’ tab at page bottom.
3. Touch the ‘Add-Ons’ sub-tab. (Use the arrow at the right of the last visible sub-tab to reveal more sub-tabs, including the ‘Add-On’ sub-tab you will need to select).
4. Type your account number into the field marked ‘Gift Card Account’.
5. Touch ‘Save’ on the NavBar when finished.

SMS Account Code

Once you have signed up for SMS Account Service, you can begin sending text messages to staff and clients.

To setup your SMS Account Code in TouchSuite:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘Preferences’ tab at page bottom
3. Touch the ‘Add-Ons’ sub-tab. (Use the arrow at the right of the last visible sub-tab to reveal more sub-tabs, including the ‘Add-On’ sub-tab you will need to select).
4. Type your account number into the field marked ‘SMS Account Code’.
5. Touch ‘Save’ on the NavBar when finished.

NOTE: TouchSuite uses your existing data in training mode, but does not save or record any changes. All data is restored intact when switching back to 'Live Mode'.

Online Data Backup

Get peace of mind with TouchSuite's new online data backup service. Your important client, staff, product, and sales data are automatically backed up daily in a remote, secure location (Note: Requires that your internet is working properly and system is left on overnight). Should you need to restore your system with the latest saved data, our team will handle it for you.
To sign up for TouchSuite® Online Backup, ask us for the easy Add-on Services form. We'll send it to your email.

*subscription required

To setup Online Data Backup Code:

1. Touch 'Back Office' on the home screen.
2. Select the 'Preferences' tab at page bottom
3. Touch the 'Add-Ons' sub-tab. (Use the arrow at the right of the last visible sub-tab to reveal more sub-tabs, including the 'Add-On' sub-tab you will need to select).
4. Type your account number into the field marked 'Online Data Backup', and check the box called 'Online Backup Account'.
5. Check the 'Enable Online Backup' checkbox.
6. Touch 'Save' on the NavBar when finished.

Mobile Booking

Check your booked appointments remotely from any device with internet access (e.g. cell phone, laptop).

To setup Mobile Booking:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘Preferences’ tab at page bottom
3. Touch the ‘Add-Ons’ sub-tab. (Use the arrow at the right of the last visible sub-tab to reveal more sub-tabs, including the ‘Add-On’ sub-tab you will need to select).
4. Type your account number into the field marked ‘Mobile Book Code’.
5. Touch ‘Save’ on the NavBar to activate.
6. Add staff members by pressing Add and selecting each staff that will be accessing the book remotely.
7. Press ‘Save’ on the NavBar when finished.

To use MobileBook™:

5. Visit www.touchsuite.com/mobile using any device with internet access.
6. Enter your Company ID and Passcode.
7. Select a date from the calendar.
8. View booked appointments.

Summary

Summary provides you with a list of database totals (e.g., total clients, total employees, etc.) You can also reactivate inactive Clients, Employees and Products.

To view the Summary:

1. Touch ‘Back Office’ on the home screen.
2. Select the ‘Summary’ tab at page bottom.

To Reactivate Clients, Employees or Products:

1. Touch ‘Back Office’.
2. Touch ‘Summary’ tab at page bottom.
3. Choose the desired function button. Inactive Clients, Inactive Employees, or Inactive Products.
4. The Reactivate popup displays.
    a. Select the items you want to reactive by tapping the checkboxes.
5. Touch ‘Activate’ at bottom when finished.
6. Touch ‘Close’ when finished. You can now access the items in their appropriate areas of TouchSuite.

Multi-Terminal

This section is for locations that use more than one TouchSuite terminal.

To edit Multi-Terminal settings:

1. Touch ‘Back Office’ on the home screen.
2. Select the header ‘Multi-Terminal’ tab at page bottom .
3. Check [√] a box by tapping it to set that preference.
   (tap again to un-check, if desired).
4. The Main Machine name will likely already be filled in. If you need help with this section, please call Technical Support.
5. Touch ‘Save’ when finished.

14

Timeclock

Clock In / Out

Clocking in/out is a snap with TouchSuite.

To clock in:

1. Touch ‘Timeclock’ on the home screen.
2. Type your employee passcode # on the keypad pop-up.
3. Touch ‘Clock In’.
4. Touch ‘OK’ when asked to confirm.

NOTE: If you have any messages waiting for you, they will be displayed at this time.

To clock out:

1. Touch ‘Timeclock’ on the home screen.
2. Type your employee passcode # on the keypad pop-up.
3. Touch ‘Clock Out’.
4. Enter the amount of tips earned.
5. Touch ‘OK’ when asked to confirm.

NOTE: Hours worked and reported tips can be viewed in the Reports section.

Modify Hours or Tips

Update existing hours and/or tips:

1. Touch ‘Timeclock’ on the home screen.
2. Touch ‘Modify’ on the NavBar.
3. Select a Staff Member.
4. Select a Recent Activity Item.
5. Edit a text field at bottom left (i.e., In, Out, Tips as necessary).
6. Touch ‘Update’ on the NavBar.

Create new timeclock line item

To create a new instance of hours worked (e.g., a staff member forgot to sign in and out):

1. Touch ‘Timeclock’ on the home screen.
2. Touch ‘Modify’ on the NavBar.
3. Select a Staff Member at page left.
4. Select any Recent Activity Item at page right (so that you can use its formatting as a template).
5. Edit text fields at bottom left (i.e., Date, Time as necessary).
6. Touch ‘Insert’ on the NavBar.

Delete a timeclock line item

1. Touch ‘Timeclock’ on the home screen.
2. Touch ‘Modify’ on the NavBar.

3. Select a Staff Member at page left.
4. Select any Recent Activity Item at page .
5. Touch ‘Delete’ on the NavBar.

15 Tradeshow

Tradeshow is a special feature which connects you to everything that's going on in the beauty industry. You can access live RSS news feeds from national publications such as *American Salon* and *The New York Times*. You can also e-mail any listed news article to yourself or another colleague for later viewing.

View News Feed

To view a live news feed in Tradeshow:

1. Touch 'Tradeshow' on the home screen.
2. Select a publication you'd like to view by tapping it in the top-left list box.
3. Touch 'Load Feed'. (This may take a few moments).

> NOTE: News articles/editorials from the RSS feed will fill the right-hand side of the screen and provide you with a quick summary of their contents. If you wish to read the full content of these articles/editorials, you must e-mail them to another place for later viewing.

E-Mail Selected News Feed

To e-mail the selected news feed:

1. Touch 'Tradeshow' on the home screen.

2. Select a publication you’d like to view by tapping it in the top-left list box.
3. Touch ‘Load Feed’. (This may take a few moments).
4. Type a valid e-mail address into the area marked ‘E-Mail Address’.
5. Touch ‘E-Mail Feed with Links’.

16 Regulatory Compliance

About This Guide

This user guide is intended as a reference for TouchSuite Salon Management System. TouchSuite Salon is designed for today's beauty salon industry and features an intuitive user interface, stylish graphics and comprehensive data management.

This manual has been examined for accuracy. While precaution has been taken in the preparation of this manual, Invenstar, LLC takes no liability for error or omissions. Invenstar, LLC also does not assume any responsibility for damage(s) incurred directly or indirectly from errors, omissions, or discrepancies of this manual.
IN NO EVENT WILL INVENSTAR LLC BE LIABLE FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THIS PRODUCT OR DOCUMENTATION, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN PARTICULAR, INVENSTAR LLC SHALL NOT HAVE LIABILITY FOR ANY HARDWARE, SOFTWARE OR DATA STORED OR USED WITH THE PRODUCT, INCLUDING THE COSTS OF REPAIRING, REPLACING OR RECOVERING SUCH HARDWARE, SOFTWARE OR DATA.

CE Mark

This device complies with the requirements of the EEC directive 89/336/EEC with regard to "Electromagnetic Compatibility" and 73/23/EEC "Low Voltage Directive".

Caution on Lithium Batteries

There is a danger of explosion if the battery is replaced incorrectly. Replace only with same or equivalent type recommended by the manufacturer. Discard used batteries according to the manufacturer's instructions.

Legislation and WEEE Symbol

2002/96/EC Waste Electrical and Electronic Equipment Directive on the treatment, collection, recycling and disposal of electric and electronic devices and their components.

The crossed dustbin symbol on the device means that it should not be disposed of with other household wastes at the end of its working life. Instead, the device should be taken to the waste collection centers for activation of the treatment, collection, recycling and disposal procedure.

To prevent possible harm to the environment or human health from uncontrolled waste disposal, please separate this from other types of wastes and recycle it responsibly to promote the sustainable reuse of material resources. Users should contact either their supplier, or their local government office, for details of where and how they can take this item for environmentally safe recycling.

Business users should contact their supplier and check the terms and conditions of the purchase contract. This product should not be mixed with other commercial wastes for disposal.

FCC Compliance

The TouchSuite Salon terminal has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC rules. Operation is subject to the following two conditions:

- This device may not cause harmful interference.
- This device must accept any interference received, including interference that may cause undesired operation.

These limits are designed to provide reasonable protection against harmful interface in a residential installation. This equipment generates and can radiate radio frequency energy and, if not installed and used according to the instruction, may cause harmful interference to radio communications. However, there is not guarantee that interface will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which is found by turning the equipment off and on, the user is encouraged to try to correct the interface by one or more of the following measures:

- Reorient or relocate the receiving antenna
- Increase the separation between the equipment or device
- Connect the equipment to an outlet other than the receiver's
- Consult a dealer or an experienced radio/TV technician for assistance

Warranty Limits

If the TouchSuite terminal is opened by any person other than the authorized technicians, the warranty will then be automatically terminated. The user should consult his/her dealer for any technical problems. Warranty voids if the user does not follow the instructions in application of this product. The manufacturer is by no means responsible for any damage or hazard caused by improper use.

Trademarks and Servicemarks

Safety Information

1. To disconnect the machine from the electrical power supply, turn off the power switch and remove the power cord plug from the wall socket. The wall socket must be easily accessible and in close proximity to the machine.
2. Read these instructions carefully. Save these instructions for future reference.
3. Follow all warnings and instructions marked on the product.
4. Do not use this product near water.
5. Do not place this product on an unstable cart, stand or table. The product may fall, causing serious damage to the product.
6. Slots and openings in the cabinet and the back or bottom are provided for ventilation; to ensure reliable operation of the product and to protect it from overheating. These openings must not be blocked or covered. The openings should never be blocked by placing the product on a bed, sofa, rug, or other similar surface. This product should never be placed near or over a radiator or heat register or in a built-in installation unless proper ventilation is provided.
7. This product should be operated from the type of power indicated on the marking label. If you are not sure of the type of power available, consult your dealer or local power company.
8. Do not allow anything to rest on the power cord. Do not locate this product where persons will walk on the cord.

9. Never push objects of any kind into this product through cabinet slots as they may touch dangerous voltage points or short out parts that could result in a fire or electric shock. Never spill liquid of any kind on the product.

Appendix A: Tips & Troubleshooting

Appendix
A

Most problems with TouchSuite Salon can be solved quickly by following the advice in this chapter.

General Suggestions

To quickly reset the system

On your keyboard, press Control/Alt/Delete at the same time. When prompted, touch ‘Log Off’. The system will quickly reset. When the password screen appears, simply press ‘OK’. No password is necessary. In a moment, you will be back on the home screen.

If the monitor screen freezes

In the event that your touch screen freezes or is unresponsive to your touch, simply hold the power on/off button at the front of your monitor until the system turns itself off. Press this button a second time to reboot your system. You will not lose any stored data, but you may need to redo the most recent task you were working on.

If the scanner is not working

Make sure the USB cable from the scanner is securely attached to the USB port and that the red indicator light on the scanner is illuminated. Did you remember to tap the ‘Scan Item’ button before scanning? Or check that the cursor is blinking in the correct text field (SKU) where the information will be input? Make sure to hold scanner 4-6” away from the barcode? Did you press the button underneath the scanner while aiming at the barcode? TouchSuite offers you the option of manually entering the UPC barcode numbers for initial data entry and selecting the product from a list at checkout.

NOTE: Some clear bottles and oddly-shaped bottles are not easily read by standard scanners.

If the receipt printer is not working

Make sure your receipt printer is properly connected per the instructions in Chapter 1 'Getting Started'. Make sure the printer is turned on and that the blue indicator light on the printer is illuminated. Try pressing the *paper feed button* (the square-shaped button) at the front of the unit to determine if the printer is responsive. Try your task again. In the event that the receipt printer still does not print your receipt, try rebooting the system by holding the power on/off button on the monitor until the system turns itself off. Press this button a second time to reboot your system.

If the laser printer is not working

Make sure your laser printer is properly connected per the instructions in Chapter 1 'Getting Started'. Make sure the printer is turned on and that the blue indicator light on the printer is illuminated. You may need to press the blue 'Power Button' at the top of the unit if the printer is in power save mode. The printer will then illuminate the blue light and print a test page. Try to print your desired page again. In the event that the laser printer still does not print your desired page, try rebooting the system by holding the power on/off button on the monitor until the system turns itself off. Press this button a second time to reboot your system.

If I accidentally delete a client, staff member or product

TouchSuite will always ask ‘Are you sure you want to delete this?’ before allowing you to continue. You can reactivate clients, products and staff in the Back Office. Select ‘Back Office’ from the home screen. Then tap the ‘Summary’ tab at page bottom. Press the ‘Reactivate’ button for the particular item and check the ones you want to reactivate. Press ‘Close’ on the popup. From time to time, you may want to print a Client List report, a Product List report, etc. so that you have this data available for your reference.

Preparing for an emergency (i.e., bad weather, extended closing)

You should back up your database. Select ‘Back Office’ from the home screen. Then tap the ‘System’ tab at page bottom. Press the ‘Backup Database’ button. The backup process may take a few minutes. You may repeat this process as often as you like. The new backup simply replaces the one before it. When this is complete, shut down your system. You may also need to unplug all devices and store them safely as directed by local authorities.

NOTE: In the event of a power outage, the battery backup will beep loudly. You should immediately back up your data and shut down the system. Battery power acts as a safety net. It is not for extended use.

Recovering from a system failure

In the unlikely event of a complete system failure, you will be able to *restore* all the data you’ve backed up. We recommend you contact our technical support department to assist you to ensure that your data is recovered intact.

Appendix B: Service & Support

Invenstar/TouchSuite Customer Service	561-948-7288 Opt. 1
Invenstar/TouchSuite Sales Department	561-948-7288 Opt. 2
Invenstar/TouchSuite Technical Support	561-948-7288 Opt. 3
Invenstar/TouchSuite Corporate Office	561-948-7288 Opt. 4
Merchant Account & Credit Card Processing Customer Service	800-793-3250 Opt. 5

Online Tutorial	www.touchsuite.com/salon
Latest News & Features	www.touchsuite.com/salon
Add-On Services	www.touchsuite.com/salon

Document Revisions			
Version	Date	Author	Notes
A	1/11/08	DY	First Release
B	1/13/08	TG	Graphics, Edits, Notices
C	1/14/08	TG/DY	Image Updates
D	9/6/08	DY	Updates, Graphics, Edits
E	2/17/09	DY	Updates, Graphics, Edits
F	5/11/09	DY	Updates, Graphics, Edits
G	6/22/09	DY	Updates, Graphics, Edits
H	10/2/09	DY	Updates, Graphics, Edits
I	11/25/09	DY	Updates, Graphics, Edits
J	2/18/10	DY	Updates, Graphics, Edits
K	3/24/10	DY	Updates, Graphics, Edits
L	6/10/10	DY	Updates, Graphics, Edits
M	9/22/10	DY	Updates, Graphics, Edits
N	7/10/11	DY/CB	Updates, Graphics, Edits

TouchSuite® is a product and Trademark of:

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