



QUICK GUIDE

1-Overview

Welcome to the User Manual for SALONGENIUS. More information is available electronically in SALONGENIUS under **F1-HELP HELP**

This guide helps you standardise your day using SALONGENIUS. From starting your day, through to end of your day, this document should be your first point of call.

Use this page as a guide and find more information in the following pages

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Getting Started

Starting the day BASICS (First time users to read overview manual before using SALONGENIUS)

Starting SALONGENIUS

Select the **SALONGENIUS** button.



WARNING - SALONGENIUS Archive/Purge recommended!

Do you wish to view more details?



Do you wish to retrieve your emails?



Enter Till float for Today



Enter Access Code or Insert Licence Key to Continue



WARNING - This system has not been backed up for 12 days. Do you wish to backup now?

This message is for owners, receptionists or co-ordinators and shows recommendations for **archiving data**.

Emails can be collected now or later OR can be set to collect automatically throughout the day

Count your till float and enter here. If a mistake is made exit SALONGENIUS, then reopen SALONGENIUS to re-enter the float

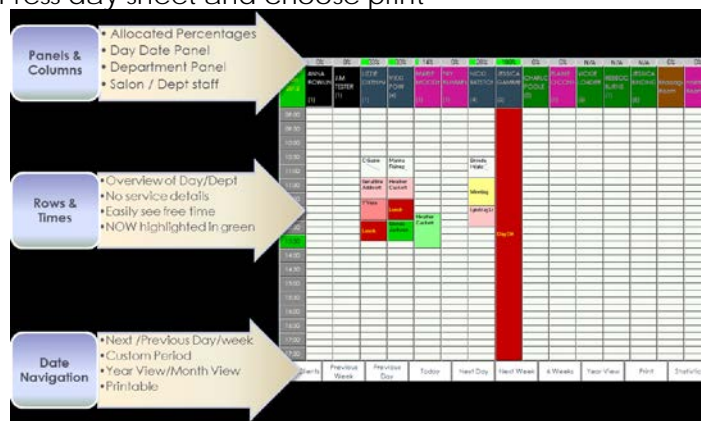
Enter your **security access code** here.


Back up now – if an error appears – please check your back up media is connected before calling SALONGENIUS support

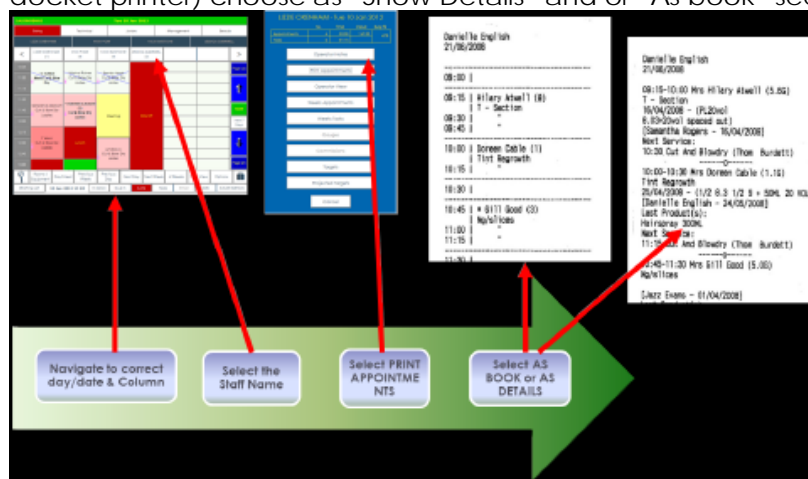
Starting your day - Appointment Book

To keep your salon running smoothly we recommend you print off the following daily sheets from the appointment book

1. **Open appointment book** – at this point if you have automatic appointment reminders configured it will send reminders to clients that are set to receive SMS messages.
 - a. Once the reminders have been sent you will be asked to print a list of clients that could not be reminded – **CHOOSE YES**
 - b. **Check clients who could not be reminded** and change contact options if applicable. Eg. set receive SMS to YES
 - c. Or **set client to be reminded** (within the clients appointment)
2. **Print off the day sheet** in case of power failure – ideally print off the day before.
 - a. Press day sheet and choose print



3. **Print the Data quality report** - This report shows the missing contact details for each client booked in today
 - a. Click on Options
 - b. Reporting
 - c. Choose the "Today" button or date range you require
 - d. Client Reports
 - e. Choose "Data Quality"
 - f. Print this list and use it to check and fill in missing client contact details.
4. **Print a list of clients booked via Online Bookings**
 - a. Click on Options
 - b. Reporting
 - c. Choose Appointments button
 - d. Choose Appointments booked online then print.
 - e. OR choose the "@" symbol (top right hand side of screen) 
5. **Operator printouts** – today's histories and appointments
 - a. Click on operators name at the top of the appointment column (white background button) from the pop up menu choose "Print Appointments" (this prints from the docket printer) choose as "Show Details" and or "As book" see below.



6. **Client communications SMS and email (this should be done throughout the day)**
 - a. Check SMS messages from your clients (if clients allowed to reply to your messages) by clicking on the SMS button and answering yes to checking for messages – if set to auto receive the messages the button will flash and change colour to blue when you have messages.
7. **Check SMS clients reminders have been sent for tomorrow** – clients should have a blue mobile phone on their appointment - if the appointment has a pink phone or no phone image you will need to check why the message has not been sent.
 - a. IMPORTANT – if the appointment **DOES NOT** have a phone image please configure by clicking on Options then choosing YES to “Always Remind Client”



Client set to be reminded (pink)



Client has been reminded (blue)



Client has confirmed

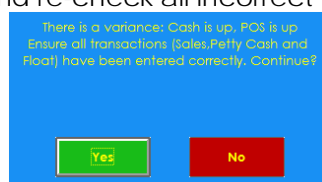
End of day

To enable you to close off your day easily please read best practice and have a clear procedure for your daily duties such as cashing up refunds, how to handle transaction mistakes etc.

1. **Correct any transaction errors** from the day and keep a copy of the original receipts and correction receipts.
 - a. Make sure any petty cash and other transactions are completed
 - b. Open the till by pressing on the “Print Docket” button
2. **Daily Reconciliation (Cashing Up)**
 - a. From the main sales screen choose **F5-5 DAILY RECONCILIATION** and choose **TODAY**. Start by counting ALL the Money in the till, gift vouchers (redeemed) cheques and total your EFTPOS transactions.



- b. Cash entry – when entering cash enter the number of the cash denominations NOT the dollar amount eg. if you have 3 x 5 cent pieces enter 3
- c. Press ok when all cash is entered
- d. In the next box enter the cheques, gift vouchers (redeemed) and the total of your EFTPOS reconciliation.
- e. Check amounts and press YES when you are happy with the figures – at this point you may receive a variance warning message letting you know your till is NOT balancing. Please press NO and re-check all incorrect transactions have been amended, cash



and other payment types are correct.

- f. When you are sure you have counted correctly press YES. At this point you can see what the variance is and correct if necessary.
- g. When prompted enter variance reason on your report – this will happen automatically when exiting SALONGENIUS at the end of the day.
- h. **BACK UP**

Daily Reconciliation - Common Variances

Consider	Action	Issue	Solution	Notes
Float Entry	Float is ENTERED	At the end of the day do you remove the float before counting the cash?	YES - By NOT including the float in the cash counted you will have -Cash Variance NO - If you count ALL the cash you are using the float correctly Entering the float lets SG know how much cash is in the till to start with	By not entering the float SG assumes there is no cash is in the till to start with
	Float is NOT entered		YES - By NOT entering the float and then REMOVING the float value from the cash counted you are using the system OK but NOT tracking your float NO - You MUST REMOVE the float value from the cash counted value otherwise you will have +Cash Variance	
Petty Cash	Petty Cash is taken from the till	Do ALL the cash withdrawals get tracked as PETTY CASH OUT?	YES - ALL cash withdrawals are tracked as PETTY CASH OUT correctly NO - You MUST track ALL cash withdrawals are tracked as PETTY CASH OUT	Cash removed from/returned to the till MUST be tracked using the PETTY CASH OUT/IN functions If these are not used correctly cash variations will occur REMEMBER to get & keep receipts
	Petty Cash change is returned to the till	Do ALL the cash returns get tracked as PETTY CASH IN?	YES - ALL cash returns are tracked as PETTY CASH IN correctly NO - You MUST track ALL cash returns are tracked as PETTY CASH IN, even if there is no change	
Credit/Debit Cards	You DO take tips/cash-back on cards	Set F2-1-3 CREDIT CARDS AMOUNT=YES	If you enter the full amount, inc tips/cash-back into SG you are using POS correctly If you enter only the sale amount in SG there will be +POS and -Cash variances	Did you know that your credit card provider will charge you a percentage rate of the full transaction amount, not just the sale amount? Thus your business will be paying for the tip/cash-back
	You DO NOT take tips/cash-back on cards	Set F2-1-3 CREDIT CARDS AMOUNT=NO	SG will complete the bill for the sale amount only	

Daily Reconciliation Considerations

There are some fundamental things that need to be considered.

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Daily reports

1. Total from sales of service & retail F5-1-1-3-2-1 SALON SUMMARY
2. Petty Cash for today F5-1-1-3-3-PETTY CASH

Basic Weekly and Monthly Reports

1. **Totals** from sales of service & retail F5-1-n-3-2-1 SALON SUMMARY
2. **Petty Cash** F5-1-n-3-3-PETTY CASH
3. Totals from sales of **Gift** F5-1-n-3-5-GIFT
4. What each **staff** have sold service & retail and referral
 - o F5-1-n-4
 - o 2-TAKINGS ACTUAL
 - o 3-TAKINGS COMMISSION-ABLE
5. **Products** bought by staff F5-1-n-4-1-STAFF PURCHASES
6. Sales **discounted** F5-1-n-5-4-DISCOUNTS
7. **Stock used** F5-1-n-6
 - o 1-DAMAGED STOCK
 - o 2-TRANSFERRED STOCK \$ 3-SHOP USE

Managerial Reports

1. **Salon Performance** F3-1-1-1 SALON
2. **Staff Performance** F3-1-1-2 STAFF
3. **Client Retention**
 - a. F7-2-4-CLIENT RETENTION
 - b. 1-SALON RETENTION
 - c. 2-CLIENTS BY OPERATOR
 - d. 3-NEW CLIENTS BY OPERATOR

Best Practice

Mistakes

Wrong payment method

- o print a duplicate receipt by clicking the print docket button
- o write on the docket explaining what the error was eg. *Should have been cash not pos.*
- o place the docket in the till so the manager can correct the mistake before cashing up at the end of the day.
- o **Correct by** refunding the incorrect bill and re-entering the correct bill

Refunds and adjustments etc.

- Please make sure any refunds or adjustments are finalised **BEFORE YOU CASH UP AT THE END OF THE DAY.**

It is beneficial to keep a note in the cash draw of any adjustments you need to make at the end of the day.

- Correct any bills entered with the incorrect payment method using the refund feature

Daily Reconciliation Variances Useful Reports

1. The following is a guide to common variances.
 - **DAY SHEET – STATISTICS** report for day – lists Paid and Outstanding Appointments
 - **OPTIONS – REPORTING – APPOINTMENTS** report for day – Appointments booked
 - **F5-4 TODAYS SALES** – aged list of sales for today (or F5-1-n-3-6)
 - Depending on the problem, the following reports may also be referred to:
 - **F5-1-1-3-3 PETTY CASH** – check petty cash IN and OUT
 - **F5-1-1-3-4-1 ACCOUNT PAYMENTS** – check account payments
 - **F5-1-1-3-5 GIFT ACTIVITY** – gift reports
 - **F5-1-1-3-2-4 PAYMENT TYPES** – reports per payment type
 - **F5-1-1-5 ADJUSTMENTS** – reports of adjustments

Equipment & Start-up

Turning on the equipment

If applicable please ensure that the printers and screen are turned on before starting the computer.

Computers

Leaving Computers on out of hours

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

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

RECOMMENDATION: Computers should be restarted every 2-7 days. Restart your computers following the same principles listed below.

Data Server

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

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

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

Turning On

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

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

Turning Off

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

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

If you are unsure about how to start or shut down your computer please contact SALONGENIUS support.

Contact us

Adelaide SA	08 7071 3840	Melbourne VIC	03 9028 0398
Brisbane QLD	07 3733 1858	Perth WA	08 9106 9158
Darwin NT	08 8901 7630	Sydney NSW Head Office	02 8355 4731
Hobart TAS	03 6108 2339	New Zealand	64-9887 7435
Fax No:	02 8607 8118		

- **Support:** Need some help? Want some training? support.australia@salongenius.com
- **Sales:** Would you like new equipment, SALONGENIUS optional extras, docket rolls or just want some advice. sales.australia@salongenius.com
- **Accounts:** Account queries admin@keystonebusinesssystems.com.au
- **Contact Us:** Want to let us know about something or recommend a new feature you would like.

Other services – We also supply the following items order online www.salongenius.net.au

- Docket Rolls
- Docket Printer Ribbons
- Customised client **Loyalty/Gift Cards**, Smart Client Loyalty Cards & key fobs
- Scratch & win cards
- Computers, Tablets, Docket Printers, Modems,
- Fingerprint readers, Smart Card Readers, Barcode / QR code scanners.